

Organizational Staffing Assessment
VILLAGE OF ORLAND PARK, ILLINOIS

FINAL REPORT



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1. INTRODUCTION AND EXECUTIVE SUMMARY

The Matrix Consulting Group was retained by the Village of Orland Park to conduct an Organizational Staffing Analysis Assessment of the Village. The report, which follows, presents the results of the study. This study was designed to provide an assessment of the Village's organizational structure and the efficiency and effectiveness of the overall operations specifically in areas that impact staffing. The Police Department in general was not included within this assessment. In this concluding point of the study, the project team has assembled this final report, which summarizes our findings, conclusions and recommendations.

1. STUDY SCOPE AND METHODOLOGIES

The Village of Orland Park sought assistance in evaluating its current organizational structure and staffing allocations. Over the last several years, many staffing changes have occurred to address financial constraints and the Village desired to undertake a comprehensive overview of staffing by department and to review the overall departmental structure of the organization. The Village sought this review to complement its continued efforts to streamline operations while maintaining appropriate service levels in an increasingly challenging economic environment.

In this Study, the Matrix Consulting Group's project team utilized a wide variety of data collection and analytical techniques. The project team conducted the following data collection and analytical activities:

- **Developed an in-depth understanding of the key issues impacting the Village.** To evaluate the Villages organizational structure and staffing allocations, the Matrix Consulting Group conducted interviews with members of the Village Board of Trustees, Village management and managers and staff in each

department. Interviews focused on goals and objectives, management systems, the use of technology, the levels of service provided by the Village, the resources available to provide those services, etc.

- **Developed a Profile of the Village.** The Matrix Consulting Group conducted interviews with Village staff in each department to document current organization of services, the structure and functions of the various departments, budgets, workload data, management systems, etc. This document was utilized as a “base” point of comparison for further analysis and comparison for all recommended changes.
- **Provided an opportunity for employee input.** In addition to interviews, the Matrix Consulting Group administered an employee survey. This survey asked employees to evaluate a variety of statements regarding the overall operations of the Village as well as their departments, and to identify constraints they faced as well as their perceptions on improvement opportunities.
- **Identified key strengths and opportunities for improvement in each department.** The ‘best management practices’ included comparisons to industry standards developed by professional organizations, such as the American Planning Association, American Public Works Association, etc. Additionally, the project team also utilized the Matrix Consulting Group’s library of best practices developed by the firm while conducting hundreds of management studies throughout the Country. The project team focused on best management practices for municipal operations, rather than state or federal agency practices.
- **Conducted further analysis of issues identified and summarize analysis in the project report.** Based on initial findings developed, the project team evaluated additional data, analyzed issues and alternatives, resulting in recommendations to staffing levels and management that would streamline operations, organizational structure and service delivery.

The objective of this study was to identify opportunities for improvement in the Village’s operational and organizational efficiency, as well as assess individual departmental staffing needs, and the overall organizational structure appropriate for the Village in the future.

This report consists of a summary of the review of the operations, management, and staffing of the Village’s departments

2. EXECUTIVE SUMMARY

The table, which follows, presents a summary of the recommendations contained in this report.

Section	Recommendation	Entity / Individual Responsible to Implement	Timeframe (Short < 2 years) Long > 2 years)	Priority	Cost / (Savings)
A.1	Replace the existing Public Relations Coordinator position to a full Public Information Officer position with an expansion of duties and responsibilities. This position should oversee the Public Information desk and associated staff.	Village Manager	Short	High	\$15,000
A.1	The provision and coordination of Special Events within the Village of Orland Park should be changed through the following efforts. The Special Events Coordinator position should be transferred to the Recreation Department and responsibilities changed to handle most special events programming. The role of the Recreation Coordinators in handling Special Events should be reduced.	Village Manager	Short	High	n/c

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Section	Recommendation	Entity / Individual Responsible to Implement	Timeframe (Short < 2 years) Long > 2 years)	Priority	Cost / (Savings)
A.1	The Board of Trustees should hold a policy workshop to discuss the current level of involvement in the provision of special events both in terms of financial and staff resources. Alternative approaches to providing these events should be considered including partnering with community entities / agencies.	Board of Trustees / Village Manager	Short	High	n/a
A.1	The Village Manager's Office should add a dedicated Administrative Assistant position to support the Village Manager and other professional staff within the Office.	Village Manager	Short	Medium	\$45,000
A.1	The duties assigned to the Assistant to the Village Manager should be reconfigured to focus more on analytical and continuous improvement efforts rather than provision of administrative support functions.	Village Manager	Short	Medium	n/a
A.1	Short-term the Village should move the IT function under the Finance Department.	Village Manager	Short	Medium	n/a

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Section	Recommendation	Entity / Individual Responsible to Implement	Timeframe (Short < 2 years) Long > 2 years)	Priority	Cost / (Savings)
A.1	Longer term, the Village should seek to add a second Assistant Village Manager and reorganize departments in a manner that groups departments of similar nature under one of the Assistant Managers to enable the Village Manager to focus on higher-level planning and strategic issues rather than routine operational issues.	Village Manager	Long	Medium	\$120,000
A.1	Over time, the Village should move to having a centralized IT function with all IT staff reporting to the IT Manager. A service level contract could be developed to identify support that will be provided for key public safety systems / IT needs.	Village Manager	Long	Medium	n/a
A.2	The Village of Orland Park should implement a formal training policy outlining the annual training requirements for various positions, including required supervisory training.	HR Director	Short	Medium	n/a
A.2	The HR Division should undertake a workforce planning effort to develop a workforce plan including succession planning.	HR Director	Long	Medium	n/a

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Section	Recommendation	Entity / Individual Responsible to Implement	Timeframe (Short < 2 years) Long > 2 years)	Priority	Cost / (Savings)
B.1	The Village should phase out the Office of Special Services at an annual cost savings in excess of \$110,000. Prior to doing so, a public education effort should be undertaken to inform resident of alternative options for procuring the services currently provided by this Office.	Board of Trustees / Village Manager	Short	High	(\$110,000)
C.1	The Village should eliminate the Assistant to the General Manager position at the Civic Center and have the Recreation Department Administrative support staff provide assistance and support as needed to the Civic Center Manager.	Board of Trustees / Village Manager	Short	High	(\$45,000)
D.1	Engineering Services should be consolidated Village-wide and placed within the Development Services Department. This function should be lead by an individual with a Professional Engineer certification.	Village Manager	Short	High	n/a
D.1	The Village should develop a plan to transition back to full-time building inspectors who are cross-trained in multiple trades.	Development Services Director	Short	Medium	Unknown

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Section	Recommendation	Entity / Individual Responsible to Implement	Timeframe (Short < 2 years) Long > 2 years)	Priority	Cost / (Savings)
D.1	Short-term the Village should implement a business retention program through contracted services. Longer-term, the Village should implement an Economic Development Coordinator position within the Development Services Department.	Village Manager / Development Services Director	Short / Long	High High	Vary dependent on approach taken.
D.2 (a)	Post common plan check corrections on the Village's website to provide guidance to architects and design professionals on the development requirements in the Village of Orland Park.	Development Services Director	Short	Medium	n/a
D.2 (b)	The Village of Orland Park should develop a program to encourage and reward staff for achieving the ability to perform multiple trade inspections. The Village should implement a classification and salary schedule that encourages and rewards employees for attaining additional trade certifications beyond those required to hold the position.	Development Services Director	Short	High	Dependent on approach taken (est. < \$20,000)
D.2(b)	The Village of Orland Park should formalize the utilization and deployment of more cross-trained building inspectors to better manage and adjust to changing workloads.	Development Services Director	Short	High	n/a

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Section	Recommendation	Entity / Individual Responsible to Implement	Timeframe (Short < 2 years) Long > 2 years)	Priority	Cost / (Savings)
D.2 (c)	Checklists should be utilized during the intake process to ensure submitted applications are complete. Incomplete applications should not be accepted.	Development Services Director	Short	Medium	n/a
D.2 (c)	Checklists utilized should be made available on the Village's website for use by the public in self-evaluating their own applications in advance.	Development Services Director	Short	Medium	n/a
D.2 (c)	The Village should further implement a permit technician position, in lieu of one of the administrative staff positions, on the front counter to assist the public and review applications as received. Incomplete applications (i.e. – those unable to be reviewed) should be rejected and not accepted.	Development Services Director	Long	Medium	\$15,000
D.2 (c)	The permit technician should be trained to perform simple zoning clearances on building permit applications to streamline the process.	Development Services Director	Short	Low	n/a
D.2 (d)	The Village should expand the use of technology to enable applicants for trade permits to complete a permit application via the Internet involving all of what is now an over-the-counter transaction.	Development Services Director	Long	High	Unknown.

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Section	Recommendation	Entity / Individual Responsible to Implement	Timeframe (Short < 2 years) Long > 2 years)	Priority	Cost / (Savings)
D.2 (e)	The Village should utilize the new software to provide the capacity for the public and for applicants to access data through the Internet.	Development Services Director	Long	High	n/a
E.1	The Village should implement a position of Purchasing Manager / Purchasing Agent position to the Finance Department (refilling vacant position) and centralize procurement functions throughout the Village.	Village Manager / Finance Director	Short	Medium	n/a (currently authorized position)
E.2 (a)	The Village should implement the reporting of performance measures, rather than workload indicators, within each Department Budget section and focus on those "key" measures / indicators that are most applicable to evaluating performance.	Finance Director	Long	Medium	n/a
E.2 (b)	The Finance Staff should develop a plan for full implementation of the electronic document functions of the Innoprise software related to payables.	Finance Director	Short	High	n/a
E.2 (b)	Finance Staff should develop an approach to implementing electronic payments to vendors as the preferred payment method of the Village in lieu of issuing paper checks.	Finance Director	Short	High	n/a

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Section	Recommendation	Entity / Individual Responsible to Implement	Timeframe (Short < 2 years) Long > 2 years)	Priority	Cost / (Savings)
E.2 (c)	The implementation of electronic timesheets for the Village of Orland Park employees should be implemented as a high priority process change.	Finance Director	Short	High	n/a
E.2 (d)	The Finance Department should develop and implement a comprehensive training program to train Department staff on the utilization of the new Innoprise financial system focusing on the functionality available on the system, reporting features and options, and specifically on those business processes that can be implemented electronically rather than paper-based.	Finance Director	Ongoing	High	n/a
F.1	To better focus efforts, all maintenance functions from the Parks and Building Maintenance and Public Works Departments should be combined into a single organizational unit. (i.e. Infrastructure Maintenance).	Village Manager	Long	High	n/a
F.2 (B)	Hire two (2) additional Maintenance Workers I. The ratio of developed acreage to Maintenance staff will effectively be 16.6 to one, which is still above recommended levels.	Village Manager	Long	Medium	\$161,000

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Section	Recommendation	Entity / Individual Responsible to Implement	Timeframe (Short < 2 years) Long > 2 years)	Priority	Cost / (Savings)
F.2 (C)	Implement Computerized Maintenance Management System for Building and Grounds Maintenance.	Parks and Building Director	Ongoing	High	Unknown
F.2 (C)	Begin to add skilled trades mechanics to the Building Maintenance Division. The project team recommends an assessment of the greatest needs in the existing structures to determine which of the trades is most needed. Further, the project team recommends the maintenance of the two seasonal Painters to perform a cycle of painting the primary, heavy-traffic buildings such as Village Hall, Civic Center, etc.	Village Manager	Long.	High	Unknown.
F.2 (D)	The Building Maintenance Division should institute a minimal preventive maintenance program that will allow for the performance of PM on at least the major maintenance components, as they are defined through a formal effort to inventory all of the mechanical systems in the Village's facilities.	Parks and Building Director	Short	High	n/a
G.1	Engineering Services should be consolidated Village-wide and placed within the Development Services Department. This function should be lead by an individual with a Professional Engineer certification.	Village Manager	Short	High	n/a

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Section	Recommendation	Entity / Individual Responsible to Implement	Timeframe (Short < 2 years) Long > 2 years)	Priority	Cost / (Savings)
G.1	To better focus efforts, all maintenance functions from the Parks and Building Maintenance and Public Works Departments should be combined into a single organizational unit. (i.e. Infrastructure Maintenance).	Village Manager	Long	High	n/a
G.2 (A)	The project team has calculated a required staffing contingent that is extremely close to the current staffing levels in the Division. There are, however, factors that may be causing the Division to fall short of accomplishing recommended preventive maintenance and required repairs to the streets and stormwater infrastructure.	Public Works Director	Long	Medium	n/a
G.2 (B)	Maintain the staffing of the Equipment Maintenance Division of Public Works at current levels.	Public Works Director	n/a	n/a	n/a
G.3	Develop an overall asset management plan for the management of the infrastructure and assets for which the two departments have been given responsibility.	Public Works Director	Ongoing	High	n/a

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Section	Recommendation	Entity / Individual Responsible to Implement	Timeframe (Short < 2 years) Long > 2 years)	Priority	Cost / (Savings)
G.3	Develop an inventory of the infrastructure and assets for which the Public Works Department and the Parks Operations and Building Maintenance divisions have responsibility. This should include a definition of the assets to be collected, assignment for collecting data, and a schedule for the collection of data.	Public Works Director.	Ongoing	High	n/a
G.3	The Public Works Department and the Parks divisions of Parks Operation and Building Maintenance should purchase and install a computerized maintenance management system to develop an annual work program and scheduling plan. This CMMS should be the primary vehicle by which the organizations report on work activity and the productivity of the resources utilized in accomplishing work in accordance with the work plan.	Public Works Director	Ongoing	High	Unknown.
G.3	Develop a comprehensive set of work activities performed by each division in the Public Works Department as well as the Parks Operations and Building Maintenance Division.	Public Work Director	Long	Medium	n/a

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Section	Recommendation	Entity / Individual Responsible to Implement	Timeframe (Short < 2 years) Long > 2 years)	Priority	Cost / (Savings)
G.3	The organizations providing infrastructure maintenance should define the service levels that are appropriate to be accomplished.	Public Works Director	Long	High	n/a
G.3	Once all activities have been defined, performance standards should be defined, which outline, for each major activity, the methods of accomplishment, crew sizes, levels of service, the probable materials needed, and the expected average daily production levels to be achieved. A sample of such a performance standard has been provided.	Public Works Director	Long	High	n/a
G.3	The Department of Public Works, and the Parks Divisions of Parks Operations and Building Maintenance should develop a formal work planning and scheduling system.	Public Works Director / Parks and Building Director	Long	High	n/a
G.3	Each Village Department providing maintenance services should generate a monthly performance report comparing planned versus actual performance and costs. The intent of the monthly performance report is to report actual accomplishments against the annual work plan. This report should provide the basis for directors' monthly performance reports to the Village Manager.	Directors	Long	High	n/a

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Section	Recommendation	Entity / Individual Responsible to Implement	Timeframe (Short < 2 years) Long > 2 years)	Priority	Cost / (Savings)
G.3	The Village should consider the transition to a centralized vehicle maintenance repair shop that is set up as an internal service fund, fully funded by user charges for services which are established to ensure that the shop breaks even on a cost basis at the end of each year.	Village Manager	Long	Medium	n/a
G.3	The Public Works Department should acquire and implement a formal pavement management software system.	Public Works Director	Ongoing	High	Unknown.
G.3	The Village should evaluate the pavement condition of its streets on a three-year cycle, with 33% of the streets being evaluated each year.	Public Works Director	Ongoing	Medium	n/a
G.3	The Streets Division should develop funding strategies for funding the preventive and corrective maintenance requirements of the Village's streets.	Public Works Director	Ongoing	Medium	n/a

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Section	Recommendation	Entity / Individual Responsible to Implement	Timeframe (Short < 2 years) Long > 2 years)	Priority	Cost / (Savings)
G.3	The Utilities Division is meeting a minimal preventive maintenance program, as well as the daily requirements of customer service. However, the failure to replace the underground infrastructure on a timely basis may result in the increasing frequency of failures in the future, thereby forcing a reallocation of staff to reactive maintenance rather than preventive.	Public Works Director	n/a	n/a	n/a
H.1	Following implementation of the on-line registration and online payments features for recreation classes, the Village should reevaluate the necessity of existing administrative support staff and target reduction of one position.	Recreation Director	Short	High	Potential (\$50,000)
H.1	The Village should consider the implementation of a Marketing / Retention position for the Sportsplex / CPAC on at least a part-time basis.	Recreation Director	Long	Medium	\$55,000
H.1	The current approach and level of staffing for graphics should be maintained in the short-term under other organizational and operational changes are implemented. Longer-term, a full time position may be warranted.	Recreation Director	Long	Medium	-

Section	Recommendation	Entity / Individual Responsible to Implement	Timeframe (Short < 2 years) Long > 2 years)	Priority	Cost / (Savings)
H.1	The vacant Recreation Supervisor position should be filled in the mid-term to enable the Recreation Operations Manager to fully transition to duties of that position and provide a full-time staff member to oversee the afterschool, preschool, and day camp programs.	Recreation Director	Short	High	\$40,000
H.2 (A)	The Parks and Recreation Department should conduct a formal cost of services study for recreation programming.	Recreation Director	Long	Medium	Unknown.
H.2 (B)	The Recreation Department should fully implement online recreation class registration and payments	Recreation Director	Short	High	n/a

Each of these recommendations is discussed in more detail later in the report outlining the rationale and basis for the individual recommendation.

3. SUMMARY OF POSITION AND ORGANIZATIONAL CHANGES.

For ease of review, the following table summarizes the major position changes contained in the recommendations above. It shows for each department the positions that are recommended to be added, deleted or transferred. There are also several organizational changes, generally those positions that are identified to be transferred,

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that will place functions within the organizational structure where they can be more effective and coordinated with other similar services.

Department	Position	Comments	Estimated Cost Impact
Village Manager	Public Information Officer	Replace Public Relations Coordinator.	\$15,000
	Special Events Coordinator	Transfer to Recreation	n/a
	Administrative Assistant	New position	\$45,000
	IT	Short term transfer to Finance. Long term centralize all IT functions.	n/c
	Assistant Village Manager	New position to be added longer term as part of reconfiguration of departments.	\$120,000
Village Clerk	Special Events	Positions eliminated.	(\$110,000)
Civic Center	Asst. to the General Mgr.	Position eliminated. Administrative support provided by Recreation.	(\$45,000)
Development	Engineering Functions	Consolidate in Development Services.	n/a
	Permit Technician	Further implement this approach to service delivery.	\$15,000
	Building Inspectors	Transition back to FT inspectors who are cross-trained in multiple trades.	Unknown.
	Business Retention	Short-term contract for service. Longer term add Economic Development Coordinator position.	Varies.
Finance	Purchasing Manager	Filling vacant currently authorized position.	n/c
Parks and Building Maintenance	Building Maintenance functions / positions.	Should be transferred to Infrastructure Management Department.	n/c
	Maintenance Worker I (2 positions)	Should be added over time to address deferred / preventive maintenance.	\$161,000

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Department	Position	Comments	Estimated Cost Impact
Public Works	Engineering Functions	Consolidate in Development Services.	n/a
Recreation	Administrative Support	Potential longer term to reduce one position following full implementation of on-line registration and on-line payments.	(\$50,000)
	Recreation / Retention Coordinator	New position to focus on marketing of Recreation facilities and memberships, and retain existing members of Sportsplex.	(\$55,000)
	Graphics Technician	Longer-term may be necessary for full-time position to support all Village operations.	-
	Recreation Supervisor	Vacant position should be filled.	\$40,000

These position and organizational changes are scheduled to be implemented over a period of several years. Longer term, the overall structure of the Village is recommended to group departments into one of three major units: Administrative / Support Functions, Development-related functions, and Maintenance Related functions. The short term and longer term organizational structure is reflected in the organization charts contained in Section 3.1 of this report.

2. ORGANIZATIONAL STRUCTURE, STAFFING AND OPERATIONAL RECOMMENDATIONS

The Matrix Consulting Group began their analysis of the Village's organizational structure and staffing analysis in June 2011. The process that was utilized in conducting this study and evaluating operations, staffing allocations, and organizational structure included the following:

- Initial interviews were conducted with the Village Manager and Village Trustees to identify issues, service delivery objectives, and understand existing organizational structure.
- Interviews were then conducted with all of the Village's department heads and selected other managers, supervisors, and employees. The purposes of these interviews were to document the following:
 - Organizational structure in each department;
 - Key issues facing the department;
 - Staffing of the department and responsibilities of these staff; and
 - Management systems utilized to plan, monitor and adjust approaches to providing services.
- A survey was conducted of employee attitudes toward the current Village organizational structure and management issues. Particular focus was placed on areas of duplication throughout the organization.
- A span of control analysis was conducted on managerial positions to determine areas where issues may be present relative to too narrow or too broad spans of control.
- Various alternative approaches to organizing Village services were developed and evaluated.

This document reflects the analysis of the project team in evaluating organizational structure and management issues in the Village of Orland Park.

3. ORGANIZATIONAL STRUCTURE IS AN IMPORTANT ELEMENT IN A COMMUNITY'S ABILITY TO ACCOMPLISH ITS OBJECTIVES.

Local government organizational structures are often unplanned, thereby resulting in an overall system that can be duplicative, fragmented, inefficient, and difficult to alter once in place. The Village of Orland Park is no exception, and several issues in the last decade have impacted the organizational structure and approach to service delivery. These include:

- Extended period of high growth in population and services provided;
- Generally high service levels demanded by the public;
- Incremental changes in organizational structure and staffing allocations based, at times and in part, based upon strengths of individuals rather than other factors; and
- Declining revenues or other constraints in recent years.

Incremental changes in organizational structure and organization, with no overall strategy, are often detrimental to the organization's overall performance. For example, questions posed and evaluated by the project team included:

- Are some programs unnecessarily duplicative? Does this duplication constrain progress in other areas? Administrative savings resulting from consolidation of redundant programs can be put towards enhancement of other Village services.
- Is the current structure too fragmented? Does the fragmentation prevent the Village of Orland Park from effectively mounting major initiatives or encourage smaller, less effective programs? Does this result in slower progress and lost opportunities for major gains? Fragmentation often means less flexibility for major initiatives and less accountability for basic services provided.
- Is the current structure inefficient? Do too many departments or divisions recreate the same administrative structures or have involvement in the provision of a single service? Are these structures necessary or are they redundant?
- Does a complex structure make it resistant to change direction, either from the elected Village Board, the Village Manager, or top management? Does the complexity of an organizational structure and the diversity of its structure make it

more difficult for the public and the community to identify opportunities, obtain information, and influence policy? Would other methods of organization allow a greater degree of public input?

- Are staffing allocations in line with service expectations? Are staffing allocations designed to maximize the potential of each position?

Each of these issues should be carefully considered during any contemplated reorganization. Changes have occurred in the way in which proactive and leading organizations have been organized to maximize their effectiveness. Some of the more pertinent trends are described in the following section.

4. A NUMBER OF ORGANIZATIONAL TRENDS SHOULD BE CONSIDERED.

There are a number of trends apparent in public sector organizations that should be considered in evaluating alternative forms of organization. These trends reflect a move away from organizations and systems that are:

- Centralized or decentralized as a matter of “principle” – rather focus should be on the specific services provided and the efficiency of service provision;
- Hierarchical;
- Rule-driven;
- Process-oriented; and
- Reactive.

The public sector is moving toward organizations and systems that are characterized by the elements presented below:

- **Centralized and responsive.** Public sector organizations are designing service delivery methods, especially internal support services, based upon a centralized approach that focuses on the most efficient and effective provision of the internal service without regard to perceptions of authority, control, silos, or historical practice. Going hand in hand with this is the provision of highly responsive, economical and efficient services governed by technical experts. This approach allows other departments to focus on their “core business” rather than administrative functions.

- **Decentralized and flexible.** Progressive local government organizations are designing their structure, systems and processes to provide a varied response to different situations, therefore making themselves more flexible and open to change. Greater autonomy and initiative are encouraged with required centralization utilized only where internal control is needed, it fosters greater efficiency, or cost savings.
- **Flatter organizations.** Progressive organizations are also reducing the number of layers of managers and supervisors resulting in fewer levels of organization and oversight, and enabling line workers to make more decisions. The flatter organization results from the need for quicker decisions and changes lessening the need for the command and control functions previously performed by middle managers. These organizations also typically have highly developed supervisory training programs and high levels of accountability for individuals selected for supervisory / managerial positions.
- **Mission and results-driven organizations.** Public organizations are encouraging long-term thinking through the development of strategic plans, the definition of goals, translation of these goals into desired objectives, and the use of performance measures to make more informed decisions on program priorities and resource allocations.
- **Competitive organizations.** Under pressure from the economy, reduction in revenue sources, and devolution of service from the state and federal level, local governments throughout the nation are restructuring their services to be more cost efficient and effective.
- **Anticipatory organizations.** Instead of dealing with crises as they occur, local governments are focusing on how to prevent them through such efforts as development of plans for preventive maintenance of a community's infrastructure, the development of strategic plans, adoption of performance measures, complaint tracking, etc.
- **Customer centric organizations.** Constituents are increasingly looking over the shoulder of local government and requiring justification for the actions of elected and appointed officials. There is increasing conflict within communities regarding the funding priorities of local government. This requires local entities to increasingly spend more time considering how to reach residents and be more proactive in getting their constituents involved.

These trends need to be considered in the evaluation of the Village of Orland Park's organizational structure and the development of alternatives to the current organizational structure.

5. IN EVALUATING THE PLAN OF ORGANIZATION AND MANAGEMENT SYSTEMS, A NUMBER OF PRINCIPLES SHOULD BE CONSIDERED.

In evaluating the plan of organization and the management systems of the Village of Orland Park, the Matrix Consulting Group utilized a number of principles for organizational structure. These principles are presented in the paragraphs below:

- **Organizational structure must be designed to facilitate the objectives of the Village.** Organizations must be willing to adapt to new situations, realities and priorities within a community. The organizational structure must reflect the public policy goals and objectives of a community for it to remain vital.
- **Organizational structure should facilitate decision-making, planning and management of operations and activities.** This impacts the organizational structure and the management / supervisory staffing assigned within a structure. Critical functions within an organization should be placed where those responsible can access key decision makers without having to work through multiple layers of an oversight organization. Similarly, less vital functions can be safely placed more deeply within an organizational structure. Additionally, organizational structures should enable the sharing of “internal support” services, where feasible, to maximize staff utilization, enable staff to specialize in the functions performed, and enable the overall department / agency to focus on its core businesses.
- **Organizational structures should focus attention on management or public policy priorities.** Key issues or initiatives should be given organizational prominence. This may be temporary (of a new service area) or long-term (public safety). Key services provided by the Village must be reflected in the organizational structure with no “gaps” or “overlaps” in service delivery.
- **Span of control must be appropriate given complexity of function and the management systems in place to monitor performance.** Some functions require lower ratios of staff to supervisors either due to the complexity or level of workload or operational practices that require higher levels of oversight. Other functions, such as those that are more centralized (typically) or more routine in nature, are open to higher ratios of staff to supervisors.
- **Responsibility for performing a function should be placed as low in the organization as it can while retaining effectiveness and efficiency.** Many recent trends in organizations have focused on the objective of “pushing decision making down” to line staff. Reducing the need to refer to managers also reduces the need for those same management positions.
- **Organizational structure and management systems should not be unnecessarily complex.** Organizational structures and management systems

should be based on common sense and should also be easily understood both internally and externally.

- **Roles and responsibilities of managers and supervisors should be clearly defined.** This is particularly important when there are multiple layers of supervision in an organizational structure. What makes one level of supervision different from the others above and below it? Is there a clear rationale for adding or maintaining an additional level of management or supervision?
- **An organization must be designed to maximize efficiency of programs and of its own staffing.** An organizational structure is the reflection of the priorities of the community in many ways. This includes the efficiency with which the operations of the community are run. Similar functions should be grouped together under common supervision.

These principals, coupled with the trends identified previously, lead to a number of key organizational issues, which should be considered in evaluating any organizational structure.

6. THE GUIDING PRINCIPALS OF AN EFFECTIVE ORGANIZATIONAL STRUCTURE CAN BE TRANSLATED INTO CRITERIA FOR EVALUATING THE VILLAGE OF ORLAND PARK'S ORGANIZATIONAL STRUCTURE.

In order to evaluate the organizational structure and staffing needs of the Village of Orland Park, the project team has utilized the principals summarized in the preceding sections, as follows:

Organizational Structure Criteria
Facilitates objectives and policies.
Facilitates decision-making and planning.
Facilitates management of operations.
Access to key decision makers for staff.
Critical functions near key managers.
Key programs with organizational prominence.
No gaps or overlaps in services.
Span of control is "appropriate."
Decision making at line level where possible.
Effort to make the organization "flat."

Organizational Structure Criteria
Management systems support structure.
Roles and responsibilities are clearly defined.
Distinction of roles among staff are clear.
Organization makes "common sense."
Similar functions are grouped together.

These criteria, presented in the preceding table, were utilized by the project team as a way of screening and comparing various alternative organizational structures, in conjunction with the information gained from the comparative survey and other data points, to identify the recommended alternatives.

3. SUMMARY OF ORGANIZATIONAL STRUCTURE CHANGES BY DEPARTMENT

This chapter summarizes, by department or function, the major recommended changes in organizational structure and processes that have been developed for the Village of Orland Park during this study. It should be noted that only those areas where specific changes were noted, are included in this chapter. Changes and alternatives considered, but not recommended have not been included in the report for brevity and to focus attention on the identified opportunities.

The recommendations contained in this chapter are based upon the efforts of the project team in assessing and evaluating the Village of Orland Park's organizational structure, service approaches, operational practices and staffing allocations based upon efforts that included:

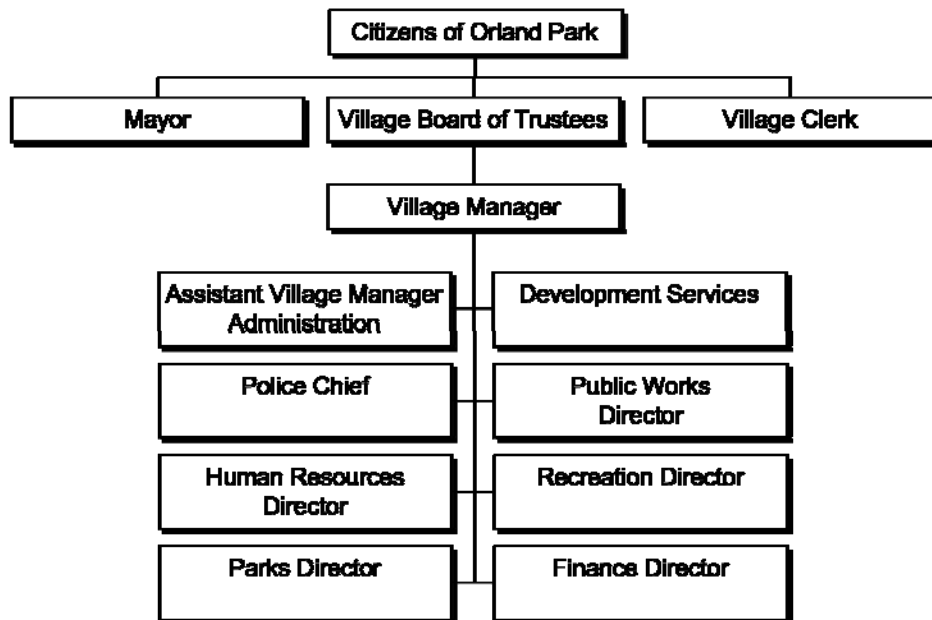
- Development and review of current organizational profile and staffing allocations;
- Comparison to other municipal organizations through the for selected positions and additional research on specific functional areas;
- Comparison to other progressive and efficient organizations;
- Issues identified by staff during the interview phase that were subsequently evaluated and analyzed by the project team;
- Issues staff identified through the employee survey and subsequently evaluated by the project team;
- Span of control evaluation; and
- Identification and evaluation of potentially duplicative or fragmented services provided throughout the organization.

These recommendations are not based primarily upon a single evaluation of one of the activities or factors listed above, but rather a comprehensive and holistic view of the organization taking into account all the data points and information available. Key guiding principles utilized by the project team in this evaluation and the subsequent development of specific recommendations were focused on changes that resulted in one or more of the following:

- Simplification / streamlining of the organization (where a resulting benefit accrued to the organization);
- Centralization of services where efficiency or effectiveness or benefits (monetary or non-monetary) could be achieved;
- Fostering future ability to be flexible in service approach and / or maintain or improve services;
- Enabling departments / agencies to focus on their core business services; and
- Consistency with good government management principles for organizational design and operation.

The following organizational chart represents the current organizational structure of the Village of Orland Park.

Village of Orland Park
Current Organizational Structure



The following sections contain tables summarize the key points evaluated and considered by the project team prior to reaching a decision point. For each departmental area, the table summarizes the factors evaluated, identified gaps or overlaps in service or lack of focus / accountability, the key benefits of the change, issues or concerns that should be noted regarding the change, and the specific recommendation identified by the project team.

A. VILLAGE MANAGER’S OFFICE.

The Village Manager’s Office is responsible for the overall administration of the Village’s operations, oversight of all departments, and support to the Village Board of Trustees. The following organizational chart shows the current staffing allocations for the Village Manager’s Office.

Evaluation Criteria	Key Comments / Observations
	<ul style="list-style-type: none"> • Village has a large number of special events coordinated internally and supported directly with Village staff in comparison to almost every organization the project team has worked with in the last several years. Prevailing practice typically involves more events handled either by local community organizational (Chamber of Commerce, special committees of community volunteers, or other local not-for-profit entities. Few utilize the amount of paid Village staff to support special events at the same level as Orland Park. • Public Information Coordinator position should be expanded to a full-service Public Information Officer to include additional support to the organization beyond current duties including serving as principal contact for the media, conducting press conferences and responding to media inquiries on behalf of Trustees and Village Administration with limited oversight. • Current segregation of IT support functions, with dedicated staff to the Police Department, provides less effective utilization of staff and makes difficult more cross utilization of staff. Total staffing numbers within IT are on the high end of typically utilized benchmarks.
<p>Alignment of Staffing / Managerial Control criteria such as:</p> <ul style="list-style-type: none"> • Span of control is “appropriate” • Decision making at line level where possible • Roles and responsibilities are clearly defined • Distinction of roles among staff are clear • Management systems support structure 	<ul style="list-style-type: none"> • Village Manager has a span of control of 1 : 8 (for department heads) and 1 : 10 including other direct reports. This is within typically seen standards but Manager has responsibility for direct oversight of all major functional areas. • Improves management systems for staff utilization. • Expanded utilization of the Assistant to the Village Manager position on true analyst functions will provide additional resources to the Organization to undertake continuous improvement efforts and analysis. • Generally functions and responsibilities within each department / functional area are clear. Specific exceptions are listed within each departmental section.
<p>Alignment with External Entities / Organizational Design Practices:</p> <ul style="list-style-type: none"> • Organization structure and makes “common sense” / “meets industry standards” or “best management practices” • Effort to make the organization “flat” / maximize managerial positions • Staffing levels are in line with recognized “best management practices” and associated workload / service levels. 	<ul style="list-style-type: none"> • Current organizational structure is traditional approach, with fairly flat organization and utilization of one Assistant Manager position. • Addition longer-term of a second Assistant Manager would enable reduction in direct report to the Village Manager enabling additional time / effort to be spent on larger Village issues and more strategic efforts / focus. • Staffing levels within the Administration function are generally in line with standards seen in other communities.

(A.1) KEY ORGANIZATIONAL ISSUES.

The following points summarize the key findings regarding the organizational structure and management staffing in the Village Manager’s Office:

- The number of managers and staff reporting directly to the Village Manager is at 8 – within normal “standards” but given range of responsibilities handled by the Village Manager provides opportunity for future reduction to provide additional time / focus on strategic planning and special initiatives.
- The Village’s Public Information Coordinator does not provide the full range of public information efforts often seen in other similar communities. The Public Information Officer position would provide a higher level of interaction with the community, Village Departments, and the media in order to communicate the Village’s message more consistently and effectively.
- Should the Special Events coordination remain as part of the Village Manager’s Office or be reallocated to the Recreation Department where the majority of other special events coordination occurs? Should the level of involvement of the Village in special events be maintained at the current level and supported as extensively with Village staff?
- Should the Village Manager’s Office have a dedicated Administrative Assistant position?
- The Assistant to the Village Manager position is underutilized as it currently is utilized due to the lack of dedicated Administrative Assistant support within the Village Manager’s Office.
- Should all IT staff be consolidated in the Village’s IT Division rather than having dedicated IT staff assigned to the Police Department?

The project team has identified, as alternatives, the following recommendations to address each of these organizational issues. The table below, provides a summary of the benefits and issues that may result from making these changes.

Alternatives / Recommendation	Benefits	Issues
Implement a full Public Information Officer position.	<ul style="list-style-type: none"> • Greater focus on public information with expanded Public Information Officer position. 	<ul style="list-style-type: none"> • Transitioning to a Public Information Officer role will require clear plan of action and shifting responsibilities between departments and individuals.

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Alternatives / Recommendation	Benefits	Issues
	<ul style="list-style-type: none"> • Enhanced communication with the public / media on Village issues, events, and publicity. • Reducing role of other high level managerial staff in public information efforts. • Position should oversee functioning of the Public Information Clerk positions. 	<ul style="list-style-type: none"> • The Village should have a single high-level Public Information Officer responsible as primary contact for media.
<p>Reallocation of Special Events Coordinator position to Recreation.</p>	<ul style="list-style-type: none"> • Realignment of Special Events Coordinator position to the Recreation Department will enable more focus on these events and enable other staff to limit involvement in these areas. • Better allocation of work among available staff. • Reduction in the role played by Recreation Coordinators in handling special events, enabling them to increase time spent on recreation programs. • Concentrates all special events handling under one individual and one department. • Other communities with a high level of sponsored events routinely coordinate these through a single position – often in the Recreation Department, since the majority of events are managed from that function. 	<ul style="list-style-type: none"> • Major change in the Village's approach to handling special events. • Transitioning positions to new roles will require clear plan of action and reallocation of some staff between departments.
<p>The Village should undertake a policy discussion at a Trustee workshop to determine if the Village desires to maintain as high a level of involvement in the direct provision and staffing of special events.</p>	<ul style="list-style-type: none"> • The Village provides a very high level of community services through the special events programming undertaken. • However, this level of support for special events exceeds that provided directly by most municipalities. 	<ul style="list-style-type: none"> • Community expectation may make changes difficult. • Alternative groups to conduct / sponsor / manage special events may not be available within the community. • Some events may not continue without the existing level of Village support.

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Alternatives / Recommendation	Benefits	Issues
	<ul style="list-style-type: none"> The policy discussion should determine the level and amount of financial and staffing resources the Village desires to allocate to special events. Reduction in the number of special events provided directly may provide additional resources (both financial and staffing related) to provide more core services. 	
<p>Addition of an Administrative Assistant / Secretarial position to the Village Manager's Office.</p>	<ul style="list-style-type: none"> Enhanced utilization of professional staff with implementation of administrative assistant / secretarial position. Dedicated administrative support to the Village Manager's professional staff. Reduction in amount of administrative / coordination / scheduling work conducted by professional staff. 	<ul style="list-style-type: none"> Implementation of a new position will require additional budgetary costs estimated at \$45,000. Increase in number of full-time employees within the organization and the Village Manager's Office.
<p>Utilization of the Assistant to the Village Manager as a professional analyst rather than supporting basic administrative functions.</p>	<ul style="list-style-type: none"> Enables this entry-level managerial position to focus on higher-level analytical duties in support of the efforts of the Village Manager. Provides opportunity for staff with analytical ability to conduct more meaningful research and operational reviews to implement a "continuous" improvement effort. 	<ul style="list-style-type: none"> Requires addition of the Administrative Assistant position to ensure administrative functions of the office are handled.
<p>Longer-term, addition of a second Assistant Village Manager's position.</p>	<ul style="list-style-type: none"> Reduces daily oversight of operational issues by Village Manager. Enables Village Manager to focus on highest priority issues facing the Village. Enables departments of similar focus to report to a single individual. 	<ul style="list-style-type: none"> Adds additional top-level Management position at a substantial cost to the organization. Should be timed at a point in the future where resources are available to support the restructuring. Perception may be created of "expansion" of Village Manager's Office.

Alternatives / Recommendation	Benefits	Issues
	<ul style="list-style-type: none"> Provides greater depth of coverage for high-level management. Increases key managerial support to the organization. 	
<p>Longer-term, consideration should be given to centralizing all IT staff under the direction of the IT Manager.</p>	<ul style="list-style-type: none"> Enables greater cross-utilization of staff. Provides a greater focus on organizational-wide IT support and efforts. Enables highest-priority programs and issues to be allocated needed resources for addressing / implementation. 	<ul style="list-style-type: none"> Perception of “loss of control” by Police department over their IT functions. New approach to service delivery that may take time to transition into. Need to evaluate skill-sets of individual staff and develop future training / cross-training programs.

The project team believes that the functioning of the organization and the Village Manager’s Office, in particular, can be enhanced through the implementation, over time, of the recommended staffing changes outlined in the table above.

Recommendation: *Replace the existing Public Relations Coordinator position to a full Public Information Officer position with an expansion of duties and responsibilities. This position should oversee the Public Information desk and associated staff.*

Recommendation: *The provision and coordination of Special Events within the Village of Orland Park should be changed through the following efforts. The Special Events Coordinator position should be transferred to the Recreation Department and responsibilities changed to handle most special events programming. The role of the Recreation Coordinators in handling Special Events should be reduced.*

Recommendation: *The Board of Trustees should hold a policy workshop to discuss the current level of involvement in the provision of special events both in terms of financial and staff resources. Alternative approaches to providing these events should be considered including partnering with community entities / agencies.*

Recommendation: *The Village Manager’s Office should add a dedicated Administrative Assistant position to support the Village Manager and other professional staff within the Office.*

Recommendation: *The duties assigned to the Assistant to the Village Manager should be reconfigured to focus more on analytical and continuous improvement efforts rather than provision of administrative support functions.*

Recommendation: *Longer term, the Village should seek to add a second Assistant Village Manager and reorganize departments in a manner that groups departments of similar nature under one of the Assistant Managers to enable the Village Manager to focus on higher-level planning and strategic issues rather than routine operational issues.*

Recommendation: *Over time, the Village should move to having a centralized IT function with all IT staff reporting to the IT Manager. A service level contract could be developed to identify support that will be provided for key public safety systems / IT needs.*

(A.2) KEY OPERATIONAL ISSUES.

In conducting the evaluation of the Village's operations, in addition to evaluating staffing and organizational structure issues, the project team evaluated various operational issues / service levels. The following section summarizes key recommendations related to operational practices identified by the project team.

(1) Human Resources Should Provide a More Comprehensive Training Effort for the Village Staff.

The provision of training is currently fragmented between the Village's Human Resources function and the operating departments. A consistent policy and practice should be adopted that outlines the type, amount and frequency of training that will be provided to employees and which are the responsibility of the Human Resources Division and which should be the responsibility of the specific operating department. This policy should outline and differentiate the required training for general employees and for supervisory employees. At a minimum, the policy should provide the following for supervisory personnel: an annual allotment of eight hours covering basic supervisory practices, supplemented by refresher training on sexual harassment,

diversity, and equal employment practices. Job specific training should continue to be provided by the operating department (and included as part of each individual employee performance appraisal), but tracked and monitored in a centralized training database / software maintained by Human Resources.

Recommendation: The Village of Orland Park should implement a formal training policy outlining the annual training requirements for various positions, including required supervisory training.

(2) The Human Resources Division Should Develop a Workforce Plan.

Workforce planning allows organizations to identify and manage changes in the workforce. The age of the workforce and growing retirement eligibility are concerns in many organizations. This may be a particular concern in some departments where the Village is anticipating high levels of retirements or the loss of key individuals in the next several years.

Implementing workforce planning allows management to project retirement rates by division or department, and prepare for replacement of lost competencies and skills. Additionally, succession planning ensures that internal competencies are being developed in key skill areas to provide continuity of service.

Workforce planning is generally defined as obtaining the right number of people with the right skills, experience, and competencies in the right jobs at the right time. In order to do workforce planning, data must be available, and systems must be available to manage data. Data requirements include workforce demographics, trends in personnel transactions, data on the skills of the existing staff and future skills needed.

The steps involved in workforce planning include the following:

- **Supply Analysis:** Identify organizational competencies; analyze staff demographics; identify employment trends.

- **Demand Analysis:** Identify future workload and activities; analyze competency sets needed in future workforce.
- **Gap Analysis:** Compare information from the supply analysis and demand analysis to identify the gaps between current and future workforce needs.
- **Solution Analysis:** Develop strategies for closing gaps in competencies and reducing surplus competencies (i.e., planned recruiting, training, retraining, transfers, succession planning, etc.).
- **Evaluation:** A periodic and systematic review of the workforce plan, reviewing mission and objectives to assure validity.

'Best practice' cities are beginning to implement workforce planning as a key function performed by their human resources staff. The Cities of Minneapolis and Austin, for example, have initiated workforce planning in the last five years and have been recognized by national publications for their efforts. While these communities are obviously much larger than the Village of Orland Park, the purpose of the plan is just as applicable to smaller organizations; and in some cases, where there are only single individuals with relevant skill sets in the organization, even more critical.

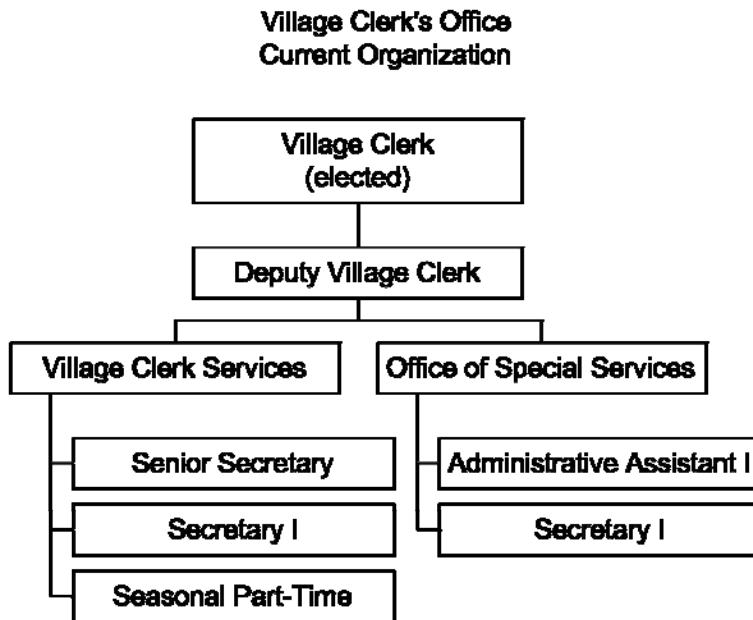
The Human Resources Division should be charged with the development of a workforce plan for the Village of Orland Park within the next eighteen to twenty-four months. The Village Manager's Office should be expected to be a major contributor to this effort by defining key positions and providing the organization priority for this effort.

Recommendation: The HR Division should undertake a workforce planning effort to develop a workforce plan including succession planning.

B. VILLAGE CLERK'S OFFICE.

The Village Clerk serves the residents of Orland Park by providing access to municipal records, support to other departments by sharing and making available official documents / records, and serving as the local election official. The Clerk also oversees

the Office of Special Services. The following organizational chart outlines the current staffing allocations:



The following table summarizes the evaluation criteria utilized and the findings that resulted from the evaluation of the organizational and operational practices of the Village Clerk’s Office:

Evaluation Criteria	Key Comments / Observations
<p>Alignment with Organization criteria such as:</p> <ul style="list-style-type: none"> • Facilitates objectives and policies • Facilitates decision making and planning • Facilitates management of operations • Access to key decision making and planning • Critical functions near key managers • Key programs with organizational prominence • No gaps or overlaps in services • Similar functions are grouped together 	<p><u>Village Clerk's Division:</u></p> <ul style="list-style-type: none"> • Staff and functions performed are focused on direct service provision and support to the organization for the Village Clerk’s component of the Office. • Reporting structures and staffing levels are appropriate. <p><u>Special Services Division:</u></p> <ul style="list-style-type: none"> • Services provided are generally duplicative of those provided elsewhere in the community or by other entities. • Services provided in this area are not typically viewed as “core services” by municipal government.

Evaluation Criteria	Key Comments / Observations
<p>Alignment of Staffing / Managerial Control criteria such as:</p> <ul style="list-style-type: none"> • Span of control is “appropriate” • Decision making at line level where possible • Roles and responsibilities are clearly defined • Distinction of roles among staff are clear • Management systems support structure 	<p><u>Village Clerk:</u></p> <ul style="list-style-type: none"> • No issues with span of control. • Appropriate delineation of roles and responsibilities among staff of the Office and between this Office and other Departments. <p><u>Special Services:</u></p> <ul style="list-style-type: none"> • Staffing allocation of two staff members to these “non-core” services at a cost of approximately \$100,000 warrants evaluation. • Services provided can generally be accessed elsewhere in the community at no cost to the resident. • Some services (those not readily available from other community sources) could be reallocated elsewhere in the organization, potentially by Public Information Clerk and Cashiers, and absorbed without staffing increases.
<p>Alignment with External Entities / Organizational Design Practices:</p> <ul style="list-style-type: none"> • Organization structure and makes “common sense” / “meets industry standards” or “best management practices” • Effort to make the organization “flat” / maximize managerial positions • Staffing levels are in line with recognized “best management practices” and associated workload / service levels. 	<ul style="list-style-type: none"> • Levels of staffing are generally appropriate for the Village Clerk core functions performed. • Staffing allocated to Special Services appears high in relation to the services provided and the need for the Village to provide these services. Few other local governments dedicate staff to these functions.

(B.1) KEY ORGANIZATIONAL ISSUES.

The following issue exists regarding the organizational structure and management staffing in the Village Clerk’s Office:

- Should the Village maintain dedicated staffing and the services provided by the Special Services Office?

The project team has identified, as alternatives, the following recommendations to address each of these organizational issues. The following table provides a summary of the benefits and issues that may result from making these changes.

Alternatives / Recommendation	Benefits	Issues
<p>The Village should phase out a dedicated Special Services Office and transition selected services to other entities.</p>	<ul style="list-style-type: none"> • None of the clients the project team has worked with in the last five years have such a high level of resource allocation to these types of “non-core” services. • The elimination of this Office enables the Village to reallocate significantly more than \$110,000 into more needed and core services for the public. • None of the services currently provided would be “lost” to citizens – they would simply be procured / handled by other entities. 	<ul style="list-style-type: none"> • Other than a “perceived” reduction in services or an added convenience, few individuals would be impacted by this change in service. • Key services currently performed by this staff can be procured elsewhere (i.e. – passports from the post office in town). • Other services could be reallocated elsewhere in the organization where they could be provided by existing staff.

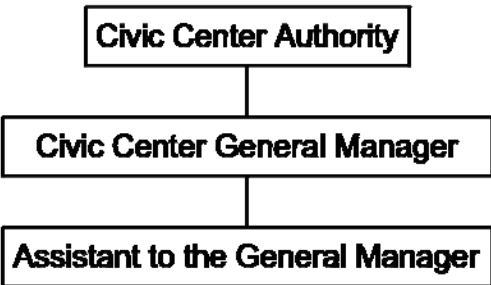
Recommendation: The Village should phase out the Office of Special Services at an annual cost savings in excess of \$110,000. Prior to doing so, a public education effort should be undertaken to inform resident of alternative options for procuring the services currently provided by this Office.

C. CIVIC CENTER.

The Civic Center is operated under the direction of the Orland Park Metropolitan Exposition, Auditorium and Office Building Authority (commonly referred to as the “Civic Center Authority”). This operation serves the residents of Orland Park by providing a facility for hosting community events, for rental for private events and as the host of various cultural and business events. The Civic Center Authority is an independent authority with one member of the Board of Trustees serving as the Village’s representative.

The following organizational chart outlines the current staffing allocations for the Civic Center:

**Civic Center
 Current Organization**



The following table summarizes the evaluation criteria utilized and the findings that resulted from the evaluation of the organizational and operational practices of the Village Clerk’s Office:

Evaluation Criteria	Key Comments / Observations
<p>Alignment with Organization criteria such as:</p> <ul style="list-style-type: none"> • Facilitates objectives and policies • Facilitates decision making and planning • Facilitates management of operations • Access to key decision making and planning • Critical functions near key managers • Key programs with organizational prominence • No gaps or overlaps in services • Similar functions are grouped together 	<ul style="list-style-type: none"> • Services provided are generally not duplicated by other Village operations. • No identified gaps or overlaps in services. • Operation under a Civic Center Authority is the typical structure seen for similar organizations; though examples exist of smaller operations (such as that provided by the Village of Orland Park) operating directly as a department of the Village (assuming financial restrictions allow).
<p>Alignment of Staffing / Managerial Control criteria such as:</p> <ul style="list-style-type: none"> • Span of control is “appropriate” • Decision making at line level where possible • Roles and responsibilities are clearly defined • Distinction of roles among staff are clear • Management systems support structure 	<ul style="list-style-type: none"> • No issues with span of control. • Appropriate delineation of roles and responsibilities among staff of the Civic Center operation and between the Civic Center and other Departments is present with the exception of the large role played by staff in Veteran’s efforts and Special Events.

Evaluation Criteria	Key Comments / Observations
<p>Alignment with External Entities / Organizational Design Practices:</p> <ul style="list-style-type: none"> • Organization structure and makes “common sense” / “meets industry standards” or “best management practices” • Effort to make the organization “flat” / maximize managerial positions • Staffing levels are in line with recognized “best management practices” and associated workload / service levels. 	<ul style="list-style-type: none"> • Current organizational structure and reporting relationships are appropriate. • Staffing levels exceed workload requirements for current utilization of the facility. • Staff expend significant time supporting non-Village activities (i.e. – Veteran’s services) and Special Events.

(C.1) KEY ORGANIZATIONAL ISSUES.

The following issue exists regarding the organizational structure and management staffing in the Village of Orland Park Civic Center:

- Is the level of staffing allocated to the Civic Center in relation to the number of events and workload appropriate?

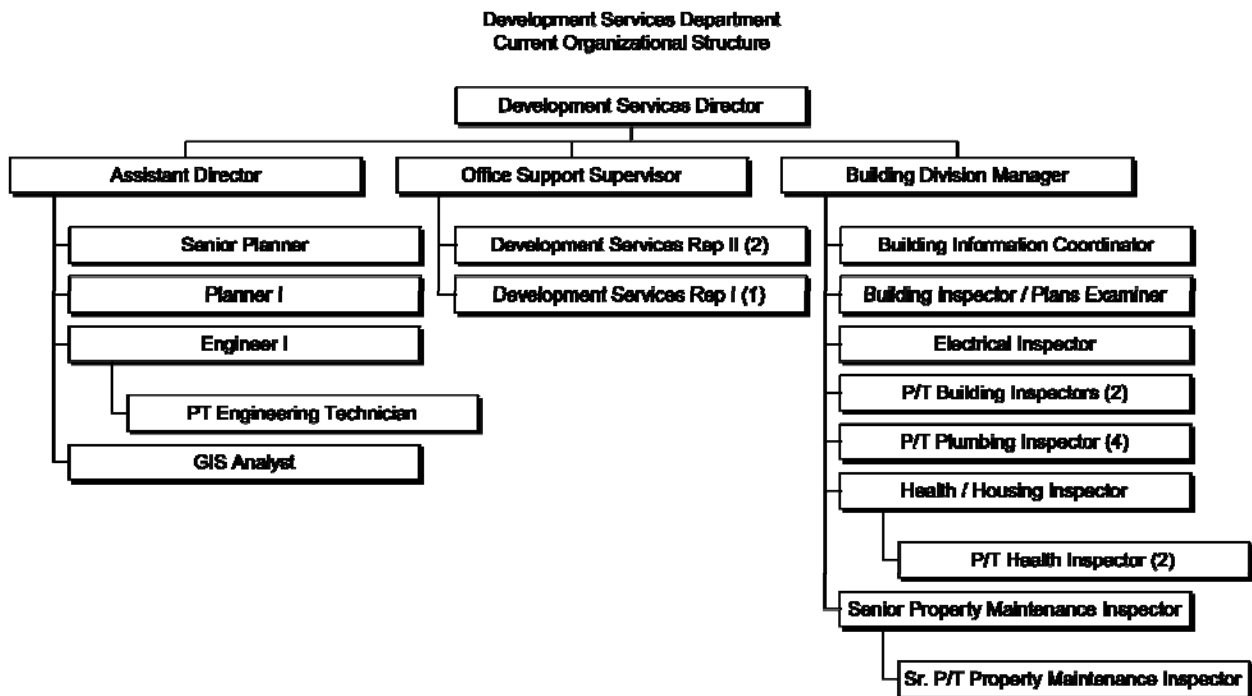
The project team has identified, as alternatives, the following recommendations to address each of these organizational issues. The table below, provides a summary of the benefits and issues that may result from making these changes.

Alternatives / Recommendation	Benefits	Issues
<p>The Village should reduce the administrative position allocated to the Civic Center and the Recreation Department should provide necessary administrative support to the Civic Center General Manager.</p>	<ul style="list-style-type: none"> • The current level of staffing allocated to the Civic Center (2 full-time positions) is not warranted based upon existing workloads and utilization levels. • A significant component of work currently performed appears related to non-Village functions. • The Village can save the costs associated with one position by eliminating the support position in the Civic Center and having administrative support provided by the Recreation Department. 	<ul style="list-style-type: none"> • A new working relationship / level of interaction will need to be established between the Civic Center Manager and the appropriate Recreation Department staff. • Some issues may arise regarding building operation / access with only one person dedicated to the facility.

Recommendation: The Village should eliminate the Assistant to the General Manager position at the Civic Center and have the Recreation Department Administrative support staff provide assistance and support as needed to the Civic Center Manager.

D. DEVELOPMENT SERVICES DEPARTMENT.

The Development Services Department in the Village of Orland Park is responsible for conducting long-range planning, conducting development review and permitting, enforcing building code regulations, and overseeing property maintenance enforcement. Additionally, office staff are responsible for the business licensing functions within the Village. The current staffing allocations within the Department are shown in the following organizational chart:



The following table summarizes the evaluation criteria utilized and the findings that resulted from the evaluation of the organizational and operational practices of the Development Services Department:

Evaluation Criteria	Key Comments / Observations
<p>Alignment with Organization criteria such as:</p> <ul style="list-style-type: none"> • Facilitates objectives and policies • Facilitates decision making and planning • Facilitates management of operations • Access to key decision making and planning • Critical functions near key managers • Key programs with organizational prominence • No gaps or overlaps in services • Similar functions are grouped together 	<ul style="list-style-type: none"> • Core development functions are currently reporting to a single department head enabling a single individual to oversee service to the public / developers. • Major issue related to split responsibility for provision and oversight of Village engineering functions was identified as an issue to be addressed. • Staff have appropriate access to decision-makers. • Lack of a dedicated position for Economic Development represents a gap in service for a Village like Orland Park that relies heavily on sales taxes generated from continued growth for financial support.
<p>Alignment of Staffing / Managerial Control criteria such as:</p> <ul style="list-style-type: none"> • Span of control is “appropriate” • Decision making at line level where possible • Roles and responsibilities are clearly defined • Distinction of roles among staff are clear • Management systems support structure 	<ul style="list-style-type: none"> • Spans of control within the organization are appropriate. • Staff roles and responsibilities are clearly defined with the exception of engineering functions that have some overlap / lack of clarity between Development Services and Public Works Departments. • Further enhancement of online services would provide greater staff efficiency and provide additional service to the public. • Appropriate management oversight and administrative systems have been implemented.
<p>Alignment with External Entities / Organizational Design Practices:</p> <ul style="list-style-type: none"> • Organization structure and makes “common sense” / “meets industry standards” or “best management practices” • Effort to make the organization “flat” / maximize managerial positions • Staffing levels are in line with recognized “best management practices” and associated workload / service levels. 	<ul style="list-style-type: none"> • Staffing levels are in line with those seen in both similar organizations by service type and workload. • Current utilization of part-time inspections is much greater than that typically seen in communities the size of Orland Park. While not an issue for service delivery at this point, when development activities increase the use of primarily part-time staff could be problematic. The Village should develop a plan for transitioning back to full-time inspectors who are cross-trained in multiple trades. • Enhanced use of the “Permit Technician” approach (currently partially in place with the Building Information Coordinator position) would enable higher levels of public service when workload increases.

(D.1) KEY ORGANIZATIONAL ISSUES.

The following points summarize the key findings regarding the organizational structure and management staffing in the Development Services Department:

- Should Engineering functions be maintained as currently segregated between Public Works and Development Services or should these functions be consolidated within a single Department?
- Should the current approach of utilizing primarily part-time inspectors be maintained?
- Should a permit technician approach to plan review acceptance and review be implemented?
- Does the Village need an enhanced level of focus and a dedicated position for Economic Development?
- Should the Village consider contracting for some economic development activities, such as business retention, with an outside entity such as private contractor or the Chamber of Commerce?

The project team has identified, as alternatives, the following recommendations to address each of these organizational issues. The table below provides a summary of the benefits and issues that may result from making these changes.

Alternatives / Recommendation	Benefits	Issues
<p>Engineering Services should be Consolidated within the Village to provide a single unit responsible for overseeing all engineering design review, inspections, and planning efforts.</p>	<ul style="list-style-type: none"> • Eliminates duplication of effort by existing staff located in multiple departments • Unit should be overseen by a certified PE. • Provides a single Department Director responsible and accountable for the provision / oversight of engineering services. • Most Village plan review functions will report to a single Department Director. • Provides an individual to implement “Village of Orland Park” standards in engineering rather than only industry code compliance. 	<ul style="list-style-type: none"> • Represents an organizational culture change in terms of reporting and service delivery. • Represents a major change in the focus of the Public Works Department to an Infrastructure Maintenance focus. • The Village does not currently have a PE on staff. • Current staff skills and expertise may not easily fit within the new structure.

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Organizational Staffing Analysis Report

Alternatives / Recommendation	Benefits	Issues
<p>The Village Should Develop a Plan for Transitioning Back to Full-time Building Inspectors and Utilize Cross-Trained / Certified Inspectors.</p>	<ul style="list-style-type: none"> • Full-time cross-certified staff enable a more flexible approach to staffing and service delivery than the utilization of part-time and single trade inspectors. • Inspections can generally be provided faster with full-time dedicated inspection staff members. • Cross-certified staff can conduct multiple inspections per stop, if necessary, enhancing service to the public. 	<ul style="list-style-type: none"> • Staffing requirements will continue to be dictated by development demands. • Some certification assistance and on-the-job training may be necessary to attract or develop cross-certified inspectors.
<p>The Village should further implement a Permit Technician position within the Development Services Department.</p>	<ul style="list-style-type: none"> • Greater level of service to the public upon application submittal. • Higher level of professionalism for limited staff. • Ability to enable plans reviewers to focus on higher-level issues and more complex plans. 	<ul style="list-style-type: none"> • May require additional salary outlay over current approach. • Requires transitioning one of the Development Services Representatives to the new position or expanding role of the Building Information Coordinator position (if workloads allow).
<p>Longer term, the Village should add a position (Economic Development Coordinator) dedicated to Economic Development activities.</p>	<ul style="list-style-type: none"> • The reliance of the Village for revenues derived from the business community warrants more dedicated services and attention to this area. • Future business growth will be more difficult than in prior years as the Village reaches full-build out and begins competing more with neighboring jurisdictions. This requires a greater level of effort to attract and retain businesses. 	<ul style="list-style-type: none"> • This position is generally located either in an integrated Development Services Department or directly to the Village Manager. • Given comprehensive Development Services Department and the need to closely coordinate with staff in this Department, the project team believes that it should be located in Development Services. • New position where full costs must be added to the budget.
<p>Short term, the Village should consider out-sourcing some components of an economic development program such as business retention efforts.</p>	<ul style="list-style-type: none"> • Outsourcing to a private individual or the Chamber of Commerce would enable quick implementation and lower annual costs to the Village. • Given the importance of taxes derived from businesses to the 	<ul style="list-style-type: none"> • Some loss of control / direction when service not provided by Village employee. • Depending upon the individual or entity selected to provide the service, there

Alternatives / Recommendation	Benefits	Issues
	Village, this effort will enhance the current dialogue regarding the local business environment.	may be some limited conflicts of interest that arise. <ul style="list-style-type: none"> • The larger issue of having a full Economic Development program is not addressed by this effort.

Recommendation: *Engineering Services should be consolidated Village-wide and placed within the Development Services Department. This function should be lead by an individual with a Professional Engineer certification.*

Recommendation: *The Village should further implement the permit technician approach within Development Services by converting one of the existing Development Services Representative positions or expanding the role of the Building Information Coordinator position.*

Recommendation: *The Village should develop a plan to transition back to full-time building inspectors who are cross-trained in multiple trades.*

Recommendation: *Short-term the Village should implement a business retention program through contracted services. Longer-term, the Village should implement an Economic Development Coordinator position within the Development Services Department.*

(D.2) KEY OPERATIONAL ISSUES.

In conducting the evaluation of the Village’s operations, in addition to evaluating staffing and organizational structure issues, the project team evaluated various operational issues / service levels. The following section summarizes key recommendations related to operational practices in the Development Services Department identified by the project team.

(A) The Development Services Department Should Publish a Common Plan Check Correction Comment Library on the Village’s Website.

The Development Services Department should develop and publish on the Village’s website a listing of common comments and corrections noted during the plan check process. Separate documents should be developed for each review area that

lists the most common ten or twelve comments noted by Plans Examiners on applications reviewed. These corrections should be analyzed, with the most common comments for each construction type (residential or commercial) posted on the Village’s website. Ideally, these types of plan check correction listings would also be developed by other reviewing entities and not simply by the staff located in Development Services.

As an example, the type of corrections noted for the Building Permit function could include the following topics.

Fire protection	Mechanical, electrical, plumbing
Room sizes, lighting, ventilation	Noise insulation
Exits, stairways, railings	Energy conservation
Roofing	Foundation requirements
Masonry	Framing
Garages	Plot plans
Elevations	Floor plans

The posting of the correction library will provide guidance to architects and design professionals in understanding the requirements for construction in the Village of Orland Park, and should include the requirements of all divisions and agencies involved in the review process in the Village. It will identify those corrections most commonly noted during the review process and provide a “check list” for the design professionals to utilize in checking plans prior to submission. Many examples exist from other communities of these type of documents to serve as a guide for staff in developing a comparable document for the Village of Orland Park.

Recommendation: Post common plan check corrections on the Village’s website to provide guidance to architects and design professionals on the development requirements in the Village of Orland Park.

(B) The Development Services Department Should Develop a Plan for Transitioning Back to Full-time Building Inspectors who have Training and Certification in Multiple Trades.

For an organization the size of the Village of Orland Park, the ability to maintain services in the absence of a specific staff member can become difficult and requires that to the extent feasible, all technical staff have multiple certifications and are cross-utilized. Smaller building permitting operations face several challenges including:

- **Limited Backup Support:** In the absence of a specific inspector, there are few resources or staff available to cover required inspections within that trade.
- **Limited Technical Support:** Absent others with in-depth knowledge of a particular trade, there are few resources for inspectors to discuss issues identified in the field and brainstorm on resolutions / alternative approaches.
- **Inability to Flex Resources with changing workloads:** When workloads for specific trades increase or decrease, there is limited ability for the Village to cross-utilize staff or handle changing levels of inspection requests in individual trades.

The Village of Orland Park has begun a process to implement cross-certified inspectors. The project team urges the Village to continue this cross-utilization approach and implement a more formal approach to fully implement multi-trade inspectors for all inspector positions in the future.

While plumbing inspectors require separate licensure / experience requirements from the state, the Village should endeavor to have all inspections fully cross-trained where-ever practical. Absent licensure for plumbing, all inspectors should be able to conduct inspections in all other trade areas. Advantages of this approach include:

- Utilization of combination dwelling inspectors enhances the efficiency of inspection services. A combination inspector increases the efficiency of inspection operations as the inspector can make all of the plumbing, mechanical, electrical, and building inspections in a single stop. With specialized inspectors, multiple different inspectors – a Building Inspector, a Plumbing Inspector, a Mechanical Inspector, and an Electrical Inspector – would all have to inspect the

structure during different stops. This results in increased non-productive travel time and reduces the number of potential inspections per day.

- The combination dwelling inspector provides continuity of contact with the contractor and better public relations. The use of a combination inspector removes stumbling blocks to the timeliness of inspection services for contractors. A combination inspector can approve the electrical, building, plumbing and mechanical work; four different inspectors do not have to make four different inspection stops to approve the construction work performed by the contractor.
- The use of combination dwelling inspectors will enable the Department to better accommodate inspection vacancies. The use of a combination inspector approach rather than inspection specialists significantly reduces the workload impact of vacant inspection positions since there is a broader pool of inspectors to allocate the workload amongst.

The use of combination inspectors is not unusual in the industry. A majority of municipalities in the nation, including throughout the Midwest, utilize combination inspectors to increase their department's flexibility in responding to inspection requests and handling inspection workload. The only major limitation is those trades, such as plumbing, that are harder to obtain without prior experience in the field. The Village should address this by seeking individuals with this background who can also be certified in the other trades.

The Matrix Consulting Group recommends that the Village continue to work to implement a formal program that will move toward requiring, as a condition of employment, that each inspector be able to provide inspections in at least three trade areas. Obviously, the department will need to develop the plan such that each discipline has increased coverage by staff. The application of combination inspectors has the potential for broader application beyond these two areas depending on the complexity of the construction.

The Department should develop a training program for each of these staff based upon a training needs assessment. In addition, the Department should provide a financial incentive to staff that obtain multi-certifications. While recognizing that the financial incentive will need to be developed in conjunction with the Human Resources Department and the Village Manager, a pay incentive of 5% per additional certification (above those required to hold the position) is not uncommon in municipal compensation plans and the financial cost to the municipality is minor relative to the benefit received in increased productivity and utilization of staff. While the Village could implement an approach that requires staff to have these multiple-certifications upon hire, that may provide limitations in the ability of the Village to recruit for future vacancies dependent upon the availability of qualified individuals at the time of the vacancy.

To accomplish this change, the Village should make changes in the job descriptions for Building Inspectors to require that inspectors have more than one trade certification upon hire for all future hires. One approach would be to require that newly hired inspectors have at least two trade certifications and/or a requirement of acquiring a third within one year of hire. Beyond this level, the Village should utilize a “certification pay” approach that provides additional pay for each trade certification achieved. Ideally, the Village should strive to have inspectors who are capable of working in multiple trades. This will not only provide greater ability to flex staff assignments based upon existing workload, but also provide more than one individual within the Village organization with the expertise in the specific trade. This provides additional resources for inspectors to discuss issues noted in the field, find resolutions, and generally improve the technical expertise of all staff.

The Village has utilized to a high degree (and effectively) the utilization of part-time inspectors over the last year. In developing the plan to transition back to full-time inspectors, and assuming cross-certified inspectors, the Village should utilize a standard of 11 inspection stops per day per full-time building inspector to determine staffing needs in the future.

Recommendation: The Village of Orland Park should develop a program to encourage and reward staff for achieving the ability to perform multiple trade inspections. The Village should implement a classification and salary schedule that encourages and rewards employees for attaining additional trade certifications beyond those required to hold the position.

Recommendation: The Village of Orland Park should formalize the utilization and deployment of more cross-trained building inspectors to better manage and adjust to changing workloads.

(C) The Village should implement Plan Review Inspection Checklists and Implement a Permit Technician Position to Enhance Service to the Public.

The Village should consider the implementation of Permit Technician position to staff the front counter for handling all incoming permit applications. This position can be created through the elevation of one of the existing Development Services Representative positions. The front counter staff, those individuals that directly interface with the public on an on-going basis, have a significant impact on the performance levels of the Department. At the present time, the individuals responsible for the intake function have limited code and process knowledge to assist the applicant at the counter with the exception of the Building Information Coordinator who is responsible for issuance of all over-the-counter permits and reviewing incoming residential submittals.

The Village of Orland Park should implement a permit technician approach at the front counter. This is a very common approach – if not prevailing practice – for Building

Departments based upon the project teams experience on a national basis. The permit technician would be responsible for not only first line interaction with the applicants but to review submitted plans for completeness. The permit technician should notify the applicant immediately if the application is incomplete and the application should not be accepted. When deeming an application complete, the permit technician is noting whether all required information is present in the application packet not whether the information is accurate. For example, the permit technician would ensure that all required calculations are present but not review the calculation for accuracy. At the present time, portions of these duties are performed by the Building Information Coordinator who handles residential plan submittals and reviews and all over-the-counter permits. Based upon workload capabilities, this position should also perform commercial completeness reviews. If workload prevents this individual from completing these duties, it would be appropriate to cross-train one of the Development Services Representatives to conduct this function. As online services increase within the Department (and counter service declines), this enables the Department to transition one of the current positions to a more professional level position that can increase the service provided to the public.

The cost of implementing this approach should be minor (perhaps \$20,000) since the Village could transition one of the current front office staff to this function – assuming that the current Building Information Coordinator position cannot assume the duties. This position should be required to have the appropriate ICC certification as a Permit Technician. This will require the other front office positions to be responsible of the majority of the other non-application and administrative functions. With this change

in place, there is not the same level of need for administrative support on the front counter or for processing / intake of applications.

This recommendation is one that has the potential to incrementally increase the level of service provided to the public since a portion of these duties are already performed by the Building Information Coordinator. Based upon the project team's experience with other communities that utilize a permit technician approach, the Village should also note a decrease in the number of reviews conducted as items that previously would have been noted as incomplete on the first plan review cycle, should be significantly reduced. As noted, checklists must be developed for each functional plan review type and these need to be made available to the public for their use in self-evaluating their applications prior to submission.

Recommendation: Checklists should be utilized during the intake process to ensure submitted applications are complete. Incomplete applications should not be accepted.

Recommendation: Checklists utilized should be made available on the Village's website for use by the public in self-evaluating their own applications in advance.

Recommendation: The Village should further implement a permit technician position, in lieu of one of the administrative staff positions, on the front counter to assist the public and review applications as received. Incomplete applications (i.e. – those unable to be reviewed) should be rejected and not accepted.

Recommendation: The permit technician should be trained to perform simple zoning clearances on building permit applications to streamline the process.

(D) APPLICANTS SHOULD BE PROVIDED WITH THE ABILITY TO OBTAIN SIMPLE BUILDING PERMITS ON-LINE.

Permits that do not require a plan check, such as single trade permits, often known as over-the-counter permits, are well suited to online permit processing. Similar to e-commerce transactions, such as buying products from a web site, this activity

involves credit card processing and the printing of a permit. On-line processing of permit applications can be as basic as automating only the front-end information collection process or as complete as full automation of the entire over-the-counter permit transaction.

At their own personal computer, applicants can apply for a building permit, schedule an inspection, and print the permit and receipt. Credit card payments are secured through the use of encryption technology. Applicants can setup their access so that basic information does not need to be re-entered for multiple transactions.

The Village should develop the capability for applicants to complete a permit application via the Internet. Applicants complete online forms and hit a "send" button to transmit the application to the Village's permit database. The software processes, reviews, approves, and stores completed permits. The permit system then generates a permit for the applicant. Applicants can pay for permits using a credit card. This will require coordination with Finance to implement on-line payments.

The department should implement this feature for simple building permits including the full automation of the entire over-the-counter permit transaction. Initially, this would include only single trades permits such as plumbing, mechanical, electrical permits, and re-roof permits. Longer-term, this should be expanded to other types of permits.

Recommendation: The Village should expand the use of technology to enable applicants for trade permits to complete a permit application via the Internet involving all of what is now an over-the-counter transaction.

(E) THE PUBLIC AND APPLICANTS SHOULD BE PROVIDED WITH ACCESS TO PERMITS PLUS OVER THE INTERNET.

The new software, Innoprise, being implemented should provide the capability for

the public and for applicants to access the permitting system through the Internet. This capacity would make information from the Village's permit database accessible via the Internet by permit applicants, residents, and other interested parties. In this instance, the Village's Web site would provide a search form where citizens enter a property address or permit number to receive current information on that permit, 24 hours a day, seven days a week, from any computer with Internet access. The Village can control the amount of information that is accessible by the public and can limit the amount of users by incorporating password protection, if it chooses to do so.

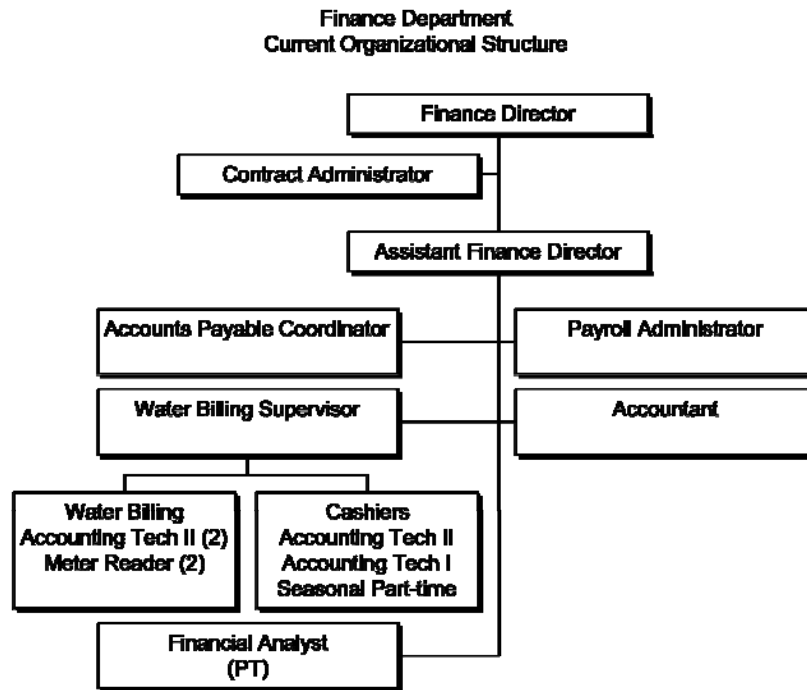
This feature should be utilized to enable applicants to check the status of their permits including viewing review comments, inspection status / comments, etc. Giving applicants the ability to check the status online reduces telephone and walk-in traffic and allows applicants and Village residents to review this information even when Village Hall is closed.

It should also be utilized to enable citizens to review proposed projects online. By placing information about proposed developments on the Web, citizens have increased opportunity to participate in the extent and type of development occurring in their neighborhood. Overland Park, Kansas, for example, enables citizens to access development activity in their neighborhood through a marriage of their permitting software and geographical information system. The City's Web site contains "What's Happening In My Neighborhood."

Recommendation: The Village should utilize the new software to provide the capacity for the public and for applicants to access data through the Internet.

E. FINANCE DEPARTMENT.

The Village of Orland Park’s Finance Department provides a full-range of financial services to the organization, including accounting, payables, procurement, internal controls, budgeting and payments. The existing organizational structure, by function, is shown in the following chart.



The following table summarizes the evaluation criteria utilized and the findings that resulted from the evaluation of the organizational and operational practices of the Finance Department:

Evaluation Criteria	Key Comments / Observations
<p>Alignment with Organization criteria such as:</p> <ul style="list-style-type: none"> • Facilitates objectives and policies • Facilitates decision making and planning • Facilitates management of operations • Access to key decision making and planning 	<ul style="list-style-type: none"> • Clear roles and responsibilities exist with staff allocations. • Staff have appropriate access to key decision makers and supervision. • All key financial functions are appropriately allocated to a single supervisor. • No significant gaps or overlaps in service were

Evaluation Criteria	Key Comments / Observations
<ul style="list-style-type: none"> • Critical functions near key managers • Key programs with organizational prominence • No gaps or overlaps in services • Similar functions are grouped together 	<p>identified.</p>
<p>Alignment of Staffing / Managerial Control criteria such as:</p> <ul style="list-style-type: none"> • Span of control is “appropriate” • Decision making at line level where possible • Roles and responsibilities are clearly defined • Distinction of roles among staff are clear • Management systems support structure 	<ul style="list-style-type: none"> • A more centralized approach to providing procurement services should be considered including transitioning from a single Contracts Administrator to a staffing allotment that includes a Purchasing Agent in addition to a Contracts Administrator (similar to what used to be in place historically). This change should include direct receipt and processing of all requests for proposals / qualification with the Purchasing Agent rather than the Village Clerk. • No issues noted regarding unclear roles among financial staff. • Decision-making occurring at appropriate levels in the organization.
<p>Alignment with External Entities / Organizational Design Practices:</p> <ul style="list-style-type: none"> • Organization structure and makes “common sense” / “meets industry standards” or “best management practices” • Effort to make the organization “flat” / maximize managerial positions • Staffing levels are in line with recognized “best management practices” and associated workload / service levels. 	<ul style="list-style-type: none"> • Current structure of the finance department is appropriate and compares positively to those typically seen in other similar municipal organizations. • The organization is not too narrow or flat. • With recommendation alternative to add second Assistant Village Manager position in the future, the Finance function may transition from a direct report to the Village Manager to reporting to an AVM overseeing all Administrative functions.

(E.1) KEY ORGANIZATIONAL ISSUES.

The following points summarize the key findings regarding the organizational structure and management staffing in the Finance Department:

- Should the procurement function be upgraded to a full Purchasing Agent / Purchasing Manager staffing model?

The project team has identified, as alternatives, the following recommendations to address each of these organizational issues. The table below, provides a summary of the benefits and issues that may result from making these changes.

Alternatives / Recommendation	Benefits	Issues
<p>The Village should implement a full Purchasing Manager / Agent position within the Finance Department.</p>	<ul style="list-style-type: none"> • Consolidates all responsibility for procurement under a single individual. • Eliminates role of Village Clerk in intake on RFP / RFQ responses. • Provides an individual in the organization with qualifications and authority to support operating Departments. • Enables greater delegation and less daily oversight by the Finance Director of this function. 	<ul style="list-style-type: none"> • Some additional costs associated with addition of a Purchasing Agent filling vacant position that was previously filled. • Implementation of this approach will require full centralization of all procurement functions within Finance, reducing the role of individual departments. • Duties of the Contract Administrator will change upon implementation.

Recommendation: The Village should implement a position of Purchasing Manager / Purchasing Agent position to the Finance Department (refilling vacant position) and centralize procurement functions throughout the Village.

(E.2) KEY OPERATIONAL ISSUES.

In conducting the evaluation of the Village's operations, in addition to evaluating staffing and organizational structure issues, the project team evaluated various operational issues / service levels. The following section summarizes key recommendations related to operational practices in the Finance Department identified by the project team.

(a) The Village Should Incorporate More Targeted Performance Measures into the Budget Document to Provide Additional Detail Regarding Service Levels Linked to Operational Expenditures.

The Village of Orland Park should modify its budget document to provide greater information linking the adopted budget to specific service levels and performance targets. Each operating unit should have a section within the Budget outlining key performance indicators and measures that can be utilized to evaluate their performance and that are linked to the allocated resources. While many indicators are currently

utilized, many or more related to work output or work levels than true performance measures.

The project team would recommend that the Village include either within each operating departmental budget section (preferred approach) or as an appendix to the budget document (alternative approach) a schedule that provides the detail on key workload and performance measures by department. The individual department pages would include those key measures and performance indicators that are most applicable to the evaluation of the services provided and that should be focused on by the reader (and policy makers) in understanding the level of performance being achieved by the department.

During the review meetings that the Village Manager conducts with Departmental Directors to monitor budget expenditures, a discussion should be held regarding mid-year progress relative to the key performance indicators. The Finance Director should be involved in these meetings.

Recommendation: The Village should implement the reporting of performance measures, rather than workload indicators, within each Department Budget section and focus on those “key” measures / indicators that are most applicable to evaluating performance.

(b) The Village Should Make a High Priority the Electronic Processing of Payables and Institute Electronic Payments to Vendors.

There are two changes that the Finance Department should implement to reduce workload (both for financial staff and department staff), increase efficiency, and enhance internal controls. These include the implementation of electronic processing and approval of payables and making electronic payments, in lieu of paper checks, to vendors. The financial system has the capability to handle both of these changes.

The new Innoprise software being implemented within the Village, provides for the ability for documents to be scanned and attached to vendor records to maintain electronic files associated with each payable. This feature eliminates the manual transfer of documents between departments / operating units and can reduce the number of paper copies and files that must be maintained. Additionally, it provides immediate access to documents related to historical transactions.

The current procedures utilized by the Village require copies of invoices to be circulated to all departments for review and sign-off and then be returned to the Finance Department for processing. This process results in unreasonable delays in processing (due to “lost” documents, time in transit between offices, etc.) and often results in copies being maintained in both the individual department and Finance Department.

The capability exists within the financial system to implement paperless processing (review and approval) of invoices. Finance Staff should work with IT to develop a plan to provide the necessary training, assistance, and guidance to Departments on utilizing this feature. The Village should target for all departments to be utilizing this feature within the next year to eighteen months.

The key benefits of implementing this approach include reduction of files and transmittal between offices and the reduction in processing time for making payments. A typical side-benefit to this is that organizations with fully automated paperless invoice review and approval procedures typically are able to take advantage of early payment discounts that they are currently not able to realize.

Additionally, Finance staff should seek to implement, as the preferred payment approach, issuing payments to vendors electronically rather than by issuing checks.

While it is not possible, as a practical manner, to require all vendors to accept electronic payments, our experience with other public entities indicates that a sizeable number will do so upon request due to the more timely receipt of their payments. The major benefit to the Village is the reduction in the work associated with printing, processing, and mailing paper checks.

Recommendation: The Finance Staff should develop a plan for full implementation of the electronic document functions of the Innoprise software related to payables.

Recommendation: Finance Staff should develop an approach to implementing electronic payments to vendors as the preferred payment method of the Village in lieu of issuing paper checks.

(c) The Village should implement, as soon as practical, the use of electronic timesheets.

The Village should move to the implementation of electronic timesheets for all employees as soon as reasonably practical. At the present time, all timesheets are entered into the payroll system by the Payroll Clerk. This project should be given a high-priority for implementation due to the increase in efficiency it presents to the Village through the reduction in the manual processing that it will represent for staff. The new financial system is capable of handling this change.

While the use of electronic timekeeping will not have an impact on the overall staffing required for the payroll function (which is only 1 FTE at the present time), it will enable this position to spend time on higher priority items rather than the entry of employee timesheets. Most public entities also find that the use of electronic timekeeping also increases the accuracy of the initial payroll generated and reduces the number of corrections that are necessary after the fact.

This change will require that individual employees (or a central administrative staff member in each department) enter the time for all staff within the unit. This time entry is then approved by the appropriate supervisor prior to being sent to the Payroll unit for processing.

Recommendation: The implementation of electronic timesheets for the Village of Orland Park employees should be implemented as a high priority process change.

(d) Additional Training and Support Should Be Provided to Operating Departments Regarding the Use of the New Financial System.

As the Village moves forward with the implementation of the new financial software, namely the Innoprise system, to replace the former HTE system, the Village should ensure that sufficient training is provided on the front-end to enable departmental users to fully understand and utilize all the features of the software. This change in systems will provide enhanced functionality that the staff will be able to utilize to further streamline the financial functions including those referenced in the prior examples.

The Finance Department should develop and implement a comprehensive training and education effort with all operating departments regarding the functionality and utilization of the financial system. They should have extended training for all staff involved in routinely entering, reviewing and pulling information from the system and spend time with each Department Director (and appropriate managers / users) to understand the type of financial reporting and the level of detail needed to monitor their programs and services. Finance should assist each department in setting up standard financial reports. Additionally, additional training should be provided to all end users on the procurement process.

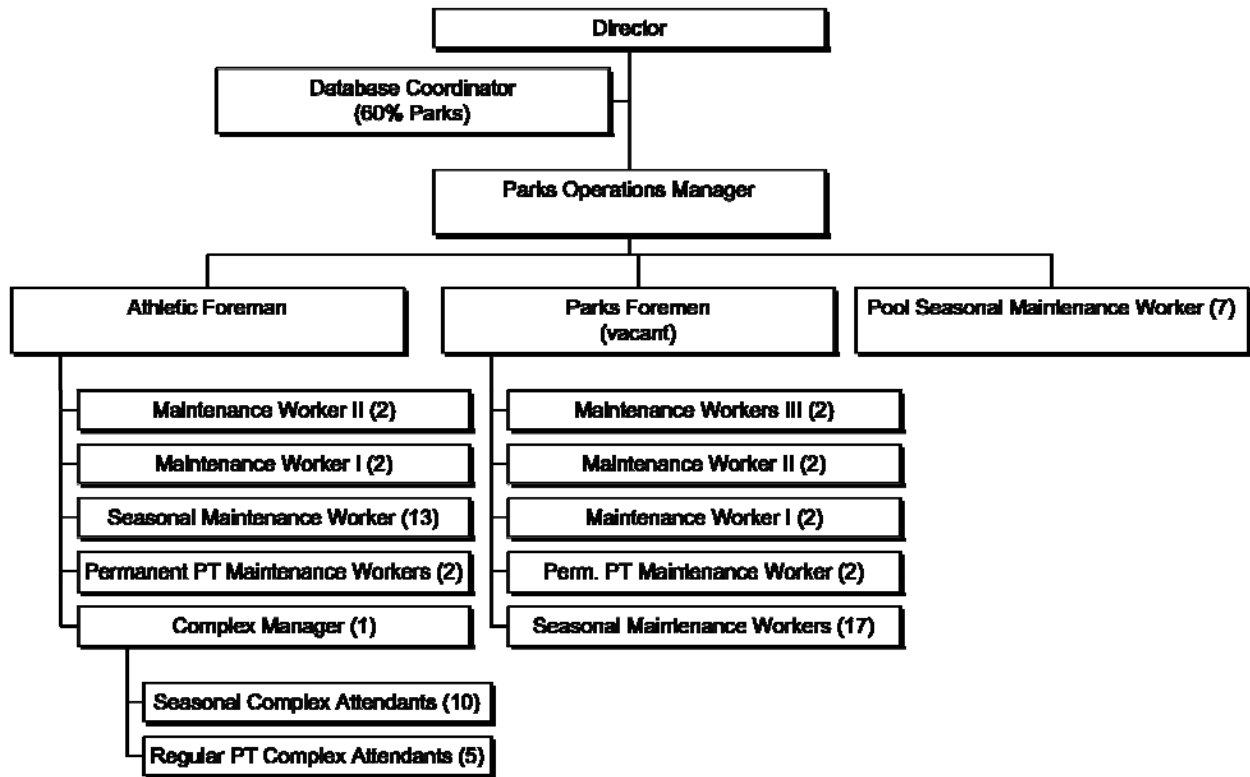
Longer-term the implementation of the new financial system and the utilization of online and paperless transactions for many of the financial functions should result in both greater efficiency for Finance Staff, as well as operating department, staff. Because the impact of these changes on the workload of the core financial functions cannot be determined at this point in time, no significant changes in financial staff allocations have been identified. Many of these staff will be conducting additional work to implement the new system and train / answer staff questions during the implementation.

Recommendation: The Finance Department should develop and implement a comprehensive training program to train Department staff on the utilization of the new Innoprise financial system focusing on the functionality available on the system, reporting features and options, and specifically on those business processes that can be implemented electronically rather than paper-based.

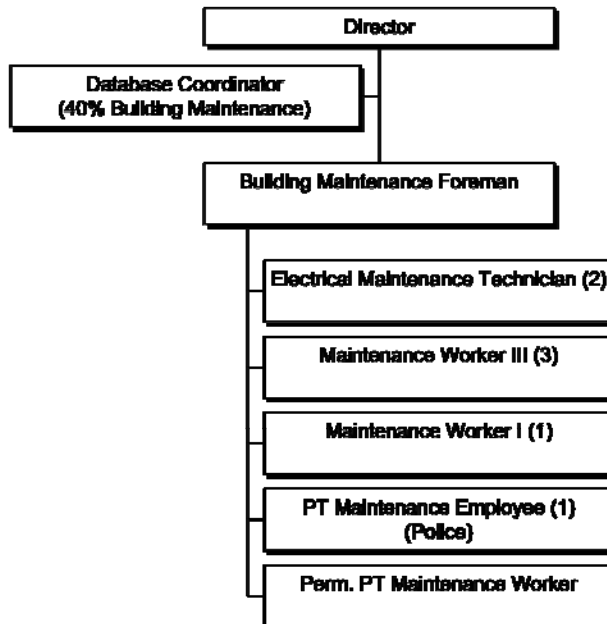
F. PARKS AND BUILDING MAINTENANCE DEPARTMENT.

The Parks and Building Maintenance Department is responsible for the maintenance, upkeep and operations of the Village owned facilities (approximately 720,000 square feet). This includes both building maintenance as well as grounds and lawn maintenance. The following organizational chart summarizes the current staffing and reporting relationships for the two functions of this division:

Parks and Building Maintenance Department
 Current Organizational Structure



Parks and Building Maintenance Department
 Current Organizational Structure



The following table summarizes the evaluation criteria utilized and the findings that resulted from the evaluation of the organizational and operational practices of the Parks and Building Maintenance Department:

Evaluation Criteria	Key Comments / Observations
<p>Alignment with Organization criteria such as:</p> <ul style="list-style-type: none"> • Facilitates objectives and policies • Facilitates decision making and planning • Facilitates management of operations • Access to key decision making and planning • Critical functions near key managers • Key programs with organizational prominence • No gaps or overlaps in services • Similar functions are grouped together 	<ul style="list-style-type: none"> • All building maintenance functions and positions report to same individual / management. • Similar functions are grouped together in the Parks and Building Maintenance Division. • Places key administrative staff under single management. • Some service overlaps, gaps and lack of clarity exist on responsibility for some park maintenance functions between Parks and Public Works Department. Sharing of resources (equipment and staff) is not easily accomplished.
<p>Alignment of Staffing / Managerial Control criteria such as:</p> <ul style="list-style-type: none"> • Span of control is “appropriate” • Decision making at line level where possible • Roles and responsibilities are clearly defined • Distinction of roles among staff are clear • Management systems support structure 	<ul style="list-style-type: none"> • Spans of control are within standard levels for supervision of maintenance personnel. • Staff roles and responsibilities are clear and distinct among staff. • Management systems are lacking for planning, organizing and tracking work activities. The current work order system is not fully utilized. • Staff resources can be placed on highest priority work duties / items.
<p>Alignment with External Entities / Organizational Design Practices:</p> <ul style="list-style-type: none"> • Organization structure and makes “common sense” / “meets industry standards” or “best management practices” • Effort to make the organization “flat” / maximize managerial positions • Staffing levels are in line with recognized “best management practices” and associated workload / service levels. 	<ul style="list-style-type: none"> • Organizational structure is not uncommon for larger organizations. However, in small communities the organizational structure more frequently has maintenance functions coordinated / reporting to Public Works (most frequently observed approach) and/or park maintenance aligned with Recreation under a single Director. • Consideration should be given to an alternative organizational structure for the maintenance functions. • Staffing levels are low in comparison to recognized standards for both park maintenance and building maintenance but most critically on building maintenance.

(F.1) KEY ORGANIZATIONAL ISSUES.

There is the following issue regarding the organizational structure and management staffing in the Parks and Building Maintenance Department:

- Should this function remain an independent department or be included with another department?

The project team has identified, as alternatives, the following recommendations to address each of these organizational issues. The table below provides a summary of the benefits and issues that may result from making these changes.

Alternatives / Recommendation	Benefits	Issues
The Village should incorporate this Parks and Building Maintenance functions with the Public Works operations in a new Department.	<ul style="list-style-type: none"> • Centralizes all maintenance functions. • Eliminated duplication of effort, staffing and equipment for similar services. • Enables cross-utilization of staff. • Places all maintenance functions under the control and accountability of a single individual. 	<ul style="list-style-type: none"> • Eliminates “department” focus / status of these functions. • Existing staff may not fit well in a new organizational structure / position level.

Recommendation: *To better focus efforts, all maintenance functions from the Parks and Building Maintenance and Public Works Departments should be combined into a single organizational unit. (i.e. Infrastructure Maintenance).*

(F.2) KEY STAFFING AND OPERATIONAL ISSUES FOR PARKS OPERATIONS.

The sub-sections that follow provide resource observations related to the Parks Operations division of Parks. The intent of the analysis is to determine if existing levels of service are provided in a cost-efficient manner.

(A) The Lack of a Computerized Maintenance Management System Precludes a Comprehensive Staffing Analysis; However, Other Data Are Available to Make Important Staffing Observations.

During the course of the study, the project team noted that there is not a computerized maintenance management system (CMMS) in place in the Parks and Recreation Department, generally, nor specifically within the Parks Operations division to capture workload data or metrics. There are several operational impacts associated with the absence of a CMMS, the most significant being lack of computerized data results in limited data availability to both Parks and Recreation managers and to our project team. Nevertheless, there are other indirect measures to determine the adequacy of staffing levels in parks maintenance operations.

(B) An Overview of the Village's Park Network and Staff Resource Modeling.

Without detailed, crew-specific workload data linking work hours to tasks and amounts of work performed (e.g. acreage maintained at each park and time taken for this activity), various other measures can be used to determine the efficiency and effectiveness of parks operations. With regard to parks and special use areas, the Parks Operations division maintains 1,024 total acres of fully developed parks, with approximately 830 of these being developed, maintainable space.

Desired staffing levels can be benchmarked based on the type of park acreage maintained and what service levels are applied to that park acreage. By example, fully developed parks that receive very high service levels will require the greatest staff resources. Conversely, parkland with no facilities can receive minimal services. The broad industry guidelines that the Matrix Consulting Group has evaluated relate the ratio of park maintenance workers to acres under maintenance for various service levels

ranging from “A” to “D”. The table that follows provides the basic definition for each of these service levels.

Service Level	Service Level Definition and Required Maintenance Staffing
“A”	State-of-the-art maintenance applied to a high quality, diverse landscape. Turf is lush, free from weeds and cut to a precise level. Plants and trees in parks are pruned for safety, tree health and ornamental beauty. Hardscapes are regularly swept and litter is collected 5-7x per week. Requires one park maintenance worker per 4 to 6 developed park acres.
“B”	A reasonably high level of maintenance associated with well-developed park areas with higher visitation rates. Major difference with Service Level “A” is turf is not cut on frequent, regular intervals at precise level and plants and trees in parks are not pruned and trimmed at the same frequency. Litter control is periodic and hardscape maintenance is less frequent. Requires one park maintenance worker per 6 to 10 developed park acres
“C”	The lowest expected service level for fully developed parks or a moderate level of maintenance associated with park locations of large size, of average development, and/or visitation. Maintenance is accomplished, usually with longer service intervals, to keep the park safe and minimally serviceable to the community. This level requires one park maintenance worker per approximately 12 to 18 park acres.
“D”	A minimal service level to parklands or open space with no facilities with the intent to maintain safe grounds and a “natural” ambience. Generally inspection services and litter control are conducted, but on an infrequent basis. Usually such services are conducted as “fill-in” work by staff but otherwise one park maintenance worker can cover several hundred acres of undeveloped parkland or open space.

The above park maintenance service levels can help frame alternative levels of service that can be provided when maintaining a park system. These modes of service, as formally defined by the NRPA, are further discussed below.¹

- **Mode A** is state-of-the-art maintenance applied to a high quality, diverse landscape usually associated with municipally-owned core facilities, destination parks with high levels of visitation, championship golf courses, and the like. Mode A locales have the following characteristics:
 - The turf is lush, dark green in appearance, of high quality and free from weeds, insects, fungus, or any foreign grasses.

¹ *Operational Guidelines for Grounds Management*, National Recreation and Park Association, 2001

- The turf is cut to a precise level, and groomed weekly on a consistent schedule. Trimming along all lawn edges is performed concurrent with mow services.
 - Plants and trees are pruned, trimmed, and shaped to ornamental beauty and are free from insects or fungus.
 - Planter beds are well raked and cultivated weekly and are free of any weeds, grass, or any foreign matter. Significant color planting (flower beds) is noted throughout the park network.
 - Irrigation systems are constantly maintained and tested weekly. There are no brown spots in the lawn as a consequence of irrigation issues or under watering.
 - Litter and/or other debris are removed daily along with trash receptacles.
 - Reseeding and sodding are done rapidly whenever bare spots are present.
- **Mode B** is a high level of maintenance associated with well-developed park areas with reasonably high visitation. Mode B level of service is similar to Mode A level of service, with a major difference being the degree of plant and turf grooming. The turf has a lush green appearance and is relatively free from weeds and foreign grasses (less than 5%). Precise cutting and mowing (e.g. golf course-like) however, is generally not practiced. Plants and trees are trimmed, pruned, and shaped but not with the same level of frequency. Planter beds are generally free from major weeds, debris, or grasses, but flowerbeds are not as extensive throughout the park network.
 - **Mode C** is a modest level of maintenance associated with locations of moderate to low levels of development and moderate to low levels of visitation. Mode C facilities have the following characteristics.
 - Turf management such as mowing, reseeding and sodding, weed control, fertilization and irrigation are practiced to maintain generally healthy grass. However, turf maintenance services are applied less frequently than other maintenance modes (levels). Turf areas under this service level are generally not useful for a variety of high-traffic organized sports and leisure activities (e.g., soccer) unless turf degradation (browning, bare patches, etc.) is tolerable over the course of a season.
 - Weeds and mixed grasses are tolerated in the turf and are considered minimally intrusive since turf conditioning and mowing is practiced on a scheduled basis.

- Turf edging is performed monthly conducive to a generally neat appearance for a larger portion of the time.
 - Litter and/or other debris are removed weekly. Trash receptacle maintenance can be problematic in certain instances of high activity as refuse is not removed on a more frequent basis.
 - Plants and trees are trimmed and pruned annually to ensure proper growth, risk reduction (e.g. falling limbs), and to maintain a reasonably healthy appearance.
 - Planter bed areas are weeded and cultivated at four-month intervals so wild weeds or grasses may be present for shorter periods of time prior to scheduled maintenance. They are tolerated at this level as long as they are small in size and the area covered with weeds is minimal.
- **Mode D** level of service is for areas in which maintenance is reduced to a minimum. Such areas do not have developed turf or irrigation systems. These areas are maintained only to the extent necessary to control growth to reduce fire hazards, and keep native vegetation alive and healthy during the growing season and to eliminate unsafe facilities. However, these facilities will need variations in the level of service defined based upon the type of open space.

Other professional associations have used a similar approach in attempting to quantify necessary staff resources to service quality and acreage. For example, The *Association of Higher Education Facilities Officers*² noted in Facilities Manager in September/October 2000:

“For many campus facilities management departments, staffing levels are an issue in whether the environment is managed with a short-term versus long-term mentality. Workers can provide different levels of maintenance quality depending on how much acreage is in each worker’s area of responsibility. For a world-class result, such as a formal garden, one person can maintain about half an acre. It takes one person to maintain up to five acres of an ornamental, well-manicured landscape with a few flaws. That person can maintain up to ten acres of a well-maintained, park-like environment with, again, some flaws. When the space reaches 15 acres, one worker can only provide moderate maintenance for a park-like look that has significant flaws. At 20 acres, one person no longer can provide a

² The *Association of Higher Education Facilities Officers* is an international association dedicated to maintaining, protecting, and promoting the quality of educational facilities. It serves and assists facilities officers and physical plant administrators in colleges, universities, and other educational institutions worldwide.

quality result; maintenance will be flawed and the landscape will continue to decline in quality.”

As noted above, the Parks Operations division maintains about 830 acres of developed parkland. This is accomplished with nine (9) full time staff, supplemented by an additional 34 part time and seasonal staff, for a total of 42 employees. The Division does contract out mowing, thereby reducing the effective number of in-house maintenance workers required to maintain parks in good condition. In previous times, when the Division mowed this area with in-house staff, it took 6 maintenance workers to accomplish this task. If it can be assumed that the mowing contract allows the diversion of 6 maintenance staff to other functions, then the effective total number of staff maintaining the 830 developed acreage equates to 48 maintenance workers, and a ratio of 17.3 developed acres per maintenance worker, which is an even greater ratio than that associated with a “D” level of maintenance as defined above.

The high ratio of developed acreage to the staff allocated to maintain it is likely resulting in only a minimal and basic level of service to the “average” park. Again, in the absence of a CMMS to verify the locations at which parks maintenance staff are expending the bulk of their hours, it is not possible to determine which parks may be receiving perhaps a higher level of service than others. Anecdotally, at least, it is probable that Centennial and John Humphrey Parks are receiving the bulk of the maintenance hours, however there are 65 other parks in the system that are receiving disproportionately fewer maintenance hours than these locations if that is the case.

There are three factors that combine to make it probable that the ratio of 17.3 developed acres per maintenance worker is under-stated. These include the following:

- Only 9 of the 42 maintenance workers are maintaining the acreage year-round. The other 34 workers are part-time and seasonal, and although the bulk of the maintenance is performed during the growing seasons in spring and summer, there are other maintenance items to accomplish in the fall and winter. This includes preparatory efforts such as repainting soccer goals and trash cans, etc., inventory control, interior pest control, restocking first aid kits, planting and pruning, and many other activities. During the active season, these are activities that are unlikely to be accomplished unless there are unusual numbers of rainy days.
- The Division staff is maintaining certain of the retention ponds that are nominally the responsibility of the Public Works Department. The maintenance of these ponds is an effort that detracts from the total available hours of the staff to perform their core services of parks and ball field maintenance.
- The lack of storage space is forcing the Division to store needed equipment in nine separate locations around the Village. Items include theater props, small-motorized equipment, scaffolding, seasonal decorations, and other materials and equipment. Travel to and from these locations for needed materials would be time-consuming under any circumstance; however the problem is made more acute due to the lack of storage inventory that identifies the location of the needed items. This creates the need for two and three trips to locate the needed item in many cases, thereby further reducing the actual park maintenance time.

In short, although it is not possible to quantify how and where the Parks Operations staff expends its time, it is circumstantially possible to state with a high degree of certainty that there is an inadequate amount of time being spent on parks to maintain them at anything other than a very low level. There are certain efforts that can be made to alleviate this situation, including the installation of a CMMS, construction of a single structure at which the staff can consolidate the divisional inventory, and transfer of all pond maintenance activities to Public Works. However, even if all of these were accomplished, the Division's staffing contingent of 9 full time and 34 part time and seasonal staff is inadequate. The project team recommends the hiring of two additional Parks Maintenance Workers to perform basic services such as weeding, mulching, field lining, painting, and other services. The addition of two Maintenance Workers is still

insufficient to attain a ratio of 15 developed acres to one Maintenance Worker, however it will, in conjunction with certain other non-personnel-related improvements noted above, allow the division to maintain its fields and grounds at a higher level than is the case currently. The addition of two staff members should also be seen as an initial effort in preparation to add more staff once current fiscal restraints are lessened.

Recommendation: Hire two (2) additional Maintenance Workers I. The cost of these Workers will be \$161,928 in salaries and benefits (calculated at 40% of salaries). The ratio of developed acreage to Maintenance staff will effectively be 16.6 to one, which is still above recommended levels.

(C) THERE EXISTS A STRONG NEED TO FULLY UTILIZE A COMPUTERIZED MAINTENANCE MANAGEMENT SYSTEM.

As noted earlier in this section, the operations of this Division are hampered by the failure to implement and fully utilize a computerized maintenance management system for planning, scheduling, and monitoring work activities. As this issue has also been identified in the Public Works Department, this issue is addressed in more detail in the following section.

(D) THE NUMBER OF AUTHORIZED POSITIONS ALLOCATED TO MAINTENANCE AND REPORT OF THE VILLAGE'S BUILDINGS IS LESS THAN WORKLOAD AND SERVICE LEVEL REQUIREMENTS.

The project team obtained the maintainable space, by building, for the Village, for which the Building Maintenance Division is responsible for maintenance and repair. These figures are utilized in the sub-sections below. The square footage of buildings maintained by the Building Maintenance Division amounts to 519,635 square feet.

The total of 519,635 square feet excludes buildings that the Department does not perform routine, ongoing maintenance such as the, pump stations and lift stations.

The *International Facility Management Association* conducts operations and maintenance surveys periodically, most recently in 2005. This survey was completed by more than 650 members of the Association comprising city and county governments, educational institutions, the federal government, state governments, insurance companies, electronics and information system companies, etc. The overall building maintenance staffing amounted to a ratio of one skilled or semi-skilled technician per 47,000 rentable square foot. This indicates that the Village would need approximately 11 skilled and semi-skilled positions to maintain the Village's buildings (excluding supervisory staff). This compares to the current total of six (6) such staff, which includes two (2) Electrical Maintenance Technicians, three (3) Maintenance Workers III, and one (1) Maintenance Worker I.

In any municipal operation of a small to mid-size, not all repairs and maintenance services are performed by in-house staff. This is also the case for the Building Maintenance Division, however interviews and a review of the budgeted expenditures indicate that these contracted services are very minimal, amounting to \$18,265 in FY 2010. Had the same amount been spent on salaries and benefits of a Village employee, this would have equated to less than 0.5 FTE, so the effective ratio of square footage maintained by a trades mechanic is approximately 80,000 to one, which is well above the 47,000 to one ratio exhibited by the IFMA response group. Further, there are reportedly 63 separate buildings in the Village for which this division is responsible, thereby effectively reducing the amount of available time to maintain any single one. This has the effect of widening the deficit between the target figure of 47,000 square feet per mechanic, and the calculated figure of 80,000.

The number of positions allocated for building maintenance should be increased over time. The project team recognizes the current budgetary limitations faced by the Village and, in fact, there are no obvious structural deficiencies in the buildings, which we viewed. However, it is also true that the project team members are not structural engineers and cannot make this technical assessment. The required number of skilled trades mechanics, exclusive of supervisory personnel, is 11 simply to achieve the average of the respondents to the IFMA survey, noted above. This is five (5) above the current staffing level of the Building Maintenance Division's staffing level. Clearly, it is infeasible to add the number of staff required to achieve the IFMA survey average, however the project team recommends that the Village incrementally add positions, focusing on the skilled trades initially, over a period of several years. Further, the staff, as currently constituted, includes no Painters. With the high volume of traffic from the public in certain of these buildings, cyclical painting is a necessity in order to avoid both unsightly structures, but decay and potential decomposition as well. The Division has, in the past, been allocated two seasonal positions to accomplish this work.

Recommendation: Begin to add skilled trades mechanics to the Building Maintenance Division. The project team recommends an assessment of the greatest needs in the existing structures to determine which of the trades is most needed. Further, the project team recommends the maintenance of the two seasonal Painters to perform a cycle of painting the primary, heavy-traffic buildings such as Village Hall, Civic Center, etc.

(E) THE BUILDING MAINTENANCE DIVISION SHOULD INSTITUTE AT LEAST A MINIMAL PREVENTIVE MAINTENANCE PROGRAM.

Interviews in the Building Maintenance Division indicate that facilities preventive maintenance is not being accomplished, as essentially all available work time of the staff is being consumed in reactive or even emergency work efforts.

Preventive maintenance (PM) is planned maintenance of plant and equipment that is designed to improve equipment life and avoid any unplanned maintenance activity. PM includes painting, lubrication, cleaning, adjusting, and minor component replacement to extend the life of equipment and facilities. Its purpose is to minimize breakdowns and excessive depreciation.

The project team, in the preceding section, outlined the lack of sufficient staffing in the Building Maintenance Division. In short, the staffing levels are only somewhat greater than half of what is typically required to accomplish an adequate mix of preventive and reactive work. However, the project team's experience with municipalities with similarly low ratios of staff to the floor space maintained manage to accomplish a basic level of PM, as this is viewed as necessary to abating the incidence of larger problems in the future. One such town experienced a ratio of 93,000 square feet of maintainable space per trades mechanic, and managed to expend 10% of all available hours on its PM program. This is a minimal amount, but achievable and worth the investment of time.

One limitation of the Building Maintenance Division is the lack of a formal, defined PM program. Such a program should begin with an inventory of all maintainable equipment (roofing, package equipment, chillers, boilers, circulating pumps, etc.) by location in each building. This should be followed by a definition of a useful economic life, with a program defined to ensure that these lives will be met. An automated work management system is useful in this regard, but not strictly necessary, to assist in the generation of reports that define the time periods, materials and labor effort that will be required to ensure that the PM event will be accomplished.

The project team recommends that the Building Maintenance Division examine the “chargeable” hours its six primary building mechanics expend in order to potentially identify expenditures of unproductive hours, or hours that do not relate to the provision of building maintenance. Many municipalities with which the project team has experience find that there are a significant number of hours that are spent in transit (i.e., “windshield time”) between buildings. These are hours that could be reduced through better management of the priorities of repair. In managing the expenditure of these hours, the project team offers the following set of priorities of response, which should allow the Building Maintenance Division to group requested repairs together of the same, or similar, response category, in order to maximize the number of hours spent in building maintenance, and to minimize the time spent in transit between buildings. With 63 buildings, this could save a significant number of hours:

- **Priority 1** – Response time by the assigned technician is not to exceed 32 hours. Examples of work include general lighting calls, carpentry and routine maintenance, discretionary work, job estimates and technician-generated work orders.
- **Priority 2** – Response time by assigned technician is not to exceed 24 hours. Examples of work include re-lamping in general circulation areas, general maintenance calls, and unique work requests.
- **Priority 3** – Response time by assigned technician is not to exceed 16 hours. Example of work include hot/cold calls in limited areas, plugged toilets, minor water leaks, limited power failures, etc.
- **Priority 4** - Response time by assigned technician is not to exceed 2 hours during regular working hours. After-hours response is dictated by the assigned technician’s location at the time of emergency, and whether the technician is already working on an emergency. Examples of work include main sewer stoppage, heating/AC system failure, building equipment failure, major power failure, security breach, building safety hazards.
- **Priority 5** - Response time by assigned technician is not to exceed 1 hour. After-hours response time is dictated by the technician’s location and whether the

technician is already working on an emergency work order. Examples of work include power outages that could be life threatening, bomb threats, natural gas leaks, water main breaks, major power outages, building or equipment fire, etc.

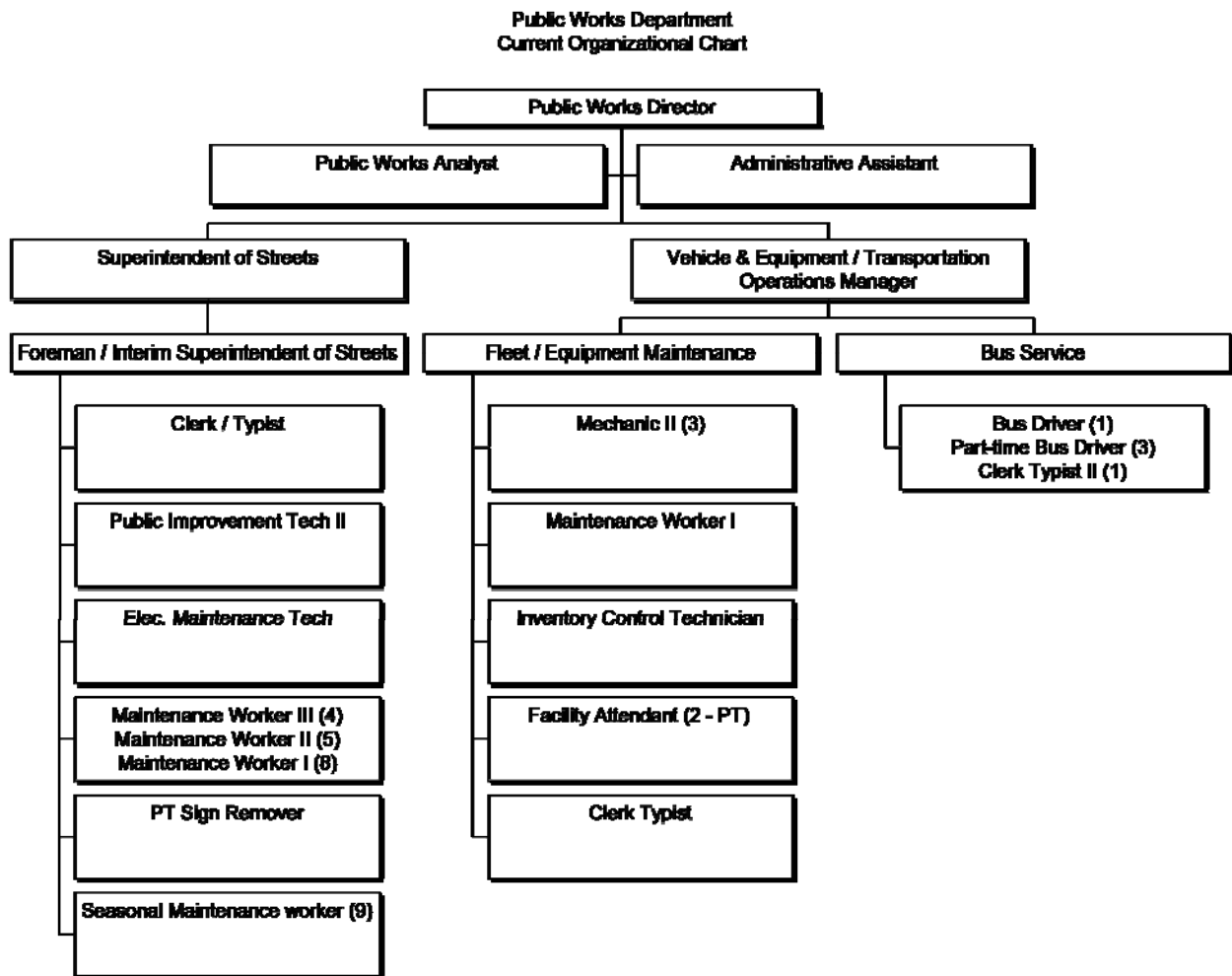
Another area of potential unnecessary time expenditure is in the performance of JULIE locates around buildings. Interviews with the Building Maintenance Foreman indicate that the Division's staff are called upon by the Public Works Department to conduct these utility locates. The absence of an automated work order and data capture system in the Building Maintenance Division prohibits defining the exact number of hours expended by Division staff in this activity, however it is one that is not related to facilities maintenance, and therefore could be a potential reduction of time expended that would allow a one-for-one swap to preventive maintenance activities.

Currently, there is reportedly no PM performed on these systems, which will result, over time, in an even greater need for staff to respond strictly to emergency repairs. The project team recommends the examination and identification of unproductive time (i.e., time not spent in the performance of direct facilities maintenance) by the mechanic staff, with a target of spending 10% of all "chargeable" hours to PM, as a beginning point. This 10% figure, although well short of the 40% to 50% that well-functioning building maintenance organizations achieve, should serve to display the benefits of the expenditure in PM, and should also begin to show results in both better-maintained equipment, and a reduction in reactive, or emergency, repairs by mechanic staff, thereby allowing an even greater expenditure of time on PM in future years.

Recommendation: The Building Maintenance Division should institute a minimal preventive maintenance program that will allow for the performance of PM on at least the major maintenance components, as they are defined through a formal effort to inventory all of the mechanical systems in the Village's facilities.

G. PUBLIC WORKS DEPARTMENT.

The Public Works Department in the Village of Orland Park is responsible for the maintenance and operations of the Village’s infrastructure including roads, bridges and sidewalks. Additionally, the Department operates the Village’s fleet operation to maintain all Village vehicles and equipment. The current staffing allocations are outlined in the following organizational chart:



The following table summarizes the evaluation criteria utilized and the findings that resulted from the evaluation of the organizational and operational practices of the Public Works Department:

Evaluation Criteria	Key Comments / Observations
<p>Alignment with Organization criteria such as:</p> <ul style="list-style-type: none"> • Facilitates objectives and policies • Facilitates decision making and planning • Facilitates management of operations • Access to key decision making and planning • Critical functions near key managers • Key programs with organizational prominence • No gaps or overlaps in services • Similar functions are grouped together 	<ul style="list-style-type: none"> • All building maintenance functions and positions report to same individual / management. • Similar functions are grouped together in the Public Works Department. • Some service overlaps, gaps and lack of clarity exist on responsibility for some park maintenance functions between Parks and Public Works Department (i.e. – pond maintenance, some tree trimming / chipping). Sharing of resources (equipment and staff) is not easily accomplished.
<p>Alignment of Staffing / Managerial Control criteria such as:</p> <ul style="list-style-type: none"> • Span of control is “appropriate” • Decision making at line level where possible • Roles and responsibilities are clearly defined • Distinction of roles among staff are clear • Management systems support structure 	<ul style="list-style-type: none"> • Spans of control are generally within standard levels for public works functions. • Staff roles and responsibilities are clear and distinct among staff. • Management systems are lacking for planning, organizing and tracking work activities. The Department lacks a pavement management program (targeted for implementation in FY 2012) and a maintenance management system. • Staff resources can be placed on highest priority work duties / items.
<p>Alignment with External Entities / Organizational Design Practices:</p> <ul style="list-style-type: none"> • Organization structure and makes “common sense” / “meets industry standards” or “best management practices” • Effort to make the organization “flat” / maximize managerial positions • Staffing levels are in line with recognized “best management practices” and associated workload / service levels. 	<ul style="list-style-type: none"> • Organizational structure is not uncommon for similar municipal operations. • Consideration should be given to an alternative organizational structure specifically to accomplish consolidation of maintenance functions under a single individual and to centralize engineering functions. • Staffing levels are low in comparison to recognized standards for some Public Works functions. Lack of reliable data on unmet preventative maintenance functions limits business case for additional staff.

(G.1) KEY ORGANIZATIONAL ISSUES.

The following points summarize the key findings regarding the organizational structure and management staffing in the Public Works Department:

- Should Engineering Services be retained in both the Public Works Department and Development Services Department as currently structured or should the services be consolidated in one Department?
- Is the current segregation of maintenance functions between the Public Works Department and the Parks and Facility Maintenance Department promoting an effective utilization of equipment or staff? Should these functions be integrated under a single manager?

The project team has identified, as alternatives, the following recommendations to address each of these organizational issues. The table below provides a summary of the benefits and issues that may result from making these changes.

Alternatives / Recommendation	Benefits	Issues
<p>Engineering Services should be Consolidated within the Village to provide a single unit responsible for overseeing all engineering design review, inspections, and planning efforts.</p>	<ul style="list-style-type: none"> • Eliminates duplication of effort by existing staff. • Unit should be overseen by a certified Professional Engineer. • Provides a single Department Director responsible and accountable for the provision and oversight of engineering services. • Provides a qualified individual able to implement “Village of Orland Park” standards in engineering rather than only industry code compliance. 	<ul style="list-style-type: none"> • Represents an organizational culture change in terms of reporting and service delivery. • Represents a major change in the focus of the Public Works Department to an Infrastructure Maintenance focus. • The Village does not currently have a PE on staff. • Current staff skills and expertise may not easily fit within the new structure.
<p>An Infrastructure Department should be established that includes all maintenance functions currently performed by Public Works and Parks and Recreation.</p>	<ul style="list-style-type: none"> • Enables cross utilization of staff and equipment to address highest priority maintenance functions. • Eliminates duplication of equipment that is occurring / planned due to having separate departments and difficulties in scheduling. • Enables implementation and utilization of common maintenance management system and shared reporting and resource allocations. 	<ul style="list-style-type: none"> • Current staff skills and expertise in management positions may not easily fit with the new organizational structure. • Reclassification of managerial positions will impact some supervisory staff. • Space limitations may impact ability to locate all operations and equipment at Public Works facility.

Recommendation: *Engineering Services should be consolidated Village-wide and placed within the Development Services Department. This function should be lead by an individual with a Professional Engineer certification.*

Recommendation: *To better focus efforts, all maintenance functions from the Parks and Building Maintenance and Public Works Departments should be combined into a single organizational unit. (i.e. Infrastructure Maintenance).*

(G.2) KEY STAFFING ISSUES.

A. THE STREETS AND STORMWATER DIVISION IS CURRENTLY STAFFED AT A LEVEL THAT PERMITS THE ACCOMPLISHMENT OF A MINIMAL PREVENTIVE AND CORRECTIVE WORKLOAD.

The Streets and Stormwater Division of Public Works maintains the following infrastructure with a contingent of 21 staff members, that includes a Foreman, a Public Improvement Technician, an Electrical Maintenance Technician, four (4) Maintenance Workers III, five (5) Maintenance Workers II, seven (7) Maintenance Workers I, a part time Maintenance Worker I, and a part time Sign Remover. In addition to this staff contingent, the Division also transfers in from the Utilities Division two (2) Maintenance Workers I.

- 415 centerline miles of paved surfaces
- 316 linear miles of sidewalk
- 384 linear miles of curb
- 4,090 streetlights
- 11 traffic signals
- 315 linear miles of storm sewer

These staff are responsible for a myriad of tasks including pothole patching, cleaning of catch basins and culverts, snow plowing, sign maintenance and replacement, curb repair, inspection of paved surfaces, inspection of contracted

resurfacing, sidewalk and curb repair, locations of underground utilities (“JULIE locates”), leaf collection, etc. The project team uses a benchmark of 10 - 12 centerline miles of paved roads per equipment operator/laborer. This benchmark is based upon work the project team has performed with a variety of other local governments. It should be recognized that this benchmark varies depending upon a number of factors including the following:

- **The adequacy of the preventive maintenance program for the paved streets in the Village of Orland Park.** The current preventive maintenance program is not fully developed and supported by either a pavement management index or a comprehensive maintenance management system to track, schedule, and manage workload.
- **The extent to which a pavement management information system has been installed to assure that streets do not deteriorate to the point where excessive repairs such as pothole patching, skin patching, digout and rebase are required.** The Public Works Department does not use a pavement management information system, but rather assesses pavement conditions visually. The absence of a formal pavement management indexing system does not allow the project team to quantify the condition of the roads in the Village; however the relatively low number of miles resurfaced in the past several years indicates that the paved surfaces likely require a higher degree of repair than would be the case with a more active resurfacing program. Village staff has indicated that a pavement management system is planned for implementation in FY 2012.
- **The extent to which staff allocated to street maintenance are diverted to functions other than street maintenance.** While common in most public works departments, it is unknown the extent to which this occurs in Orland Park, due to the lack of a CMMS.
- **The extent of unpaved roads maintained.** Unpaved roads require ongoing maintenance, such as grading. The department has no unpaved surfaces, so this is not a consideration.
- **The extent to which construction work is contracted out or performed with in-house staff.** The Public Works Department contracts out almost all pavement construction work.
- **The extent of the use of contractors for other services.** The Division utilizes contractors for mowing, crack filling and major road repairs. It also reportedly

relies upon the Building Maintenance Division personnel for some JULIE locates.

The number of linear miles (415) indicates that the total contingent necessary to maintain the Village's roads in good condition should be between 34.5 and 41.5. However, the ratio assumes that all road construction is performed by in-house crews, and that only street maintenance functions are performed by the available staff. In the case of the Streets and Stormwater Division, not only is road construction outsourced, but there are more functions being performed in the Division than the typical street maintenance activities. As noted above, these include the leaf collection program, catch basin cleaning, snow plowing, sign and signal maintenance, tree trimming, and others.

To determine the appropriate numbers of staff necessary to complete the assigned activities in the Streets and Stormwater Division of Public Works, the project team has presented, in the calculations below, the primary proactive and planned activities, the appropriate crew sizes, the assumed infrastructure maintained annually, and the expected level of effort associated with the activity.

- **Culvert cleaning.** There are an unknown number of culverts in the Village that need to be cleaned. A two-person crew should accomplish the cleaning of an average of 20 culverts per day. If it were assumed that 100 such culverts are cleaned during the season, then this would require 5 calendar days, or 10 crewmember days. This equates to 80 hours, or less than one (1) FTE necessary to accomplish this level of effort.
- **Catch basin cleaning.** There are approximately 13,000 catch basins in the Village. These should be cleaned on a minimum cycle of once per three years, or 4,333 per year. A 2-person crew should accomplish the cleaning of 18 catch basins per day, which would take 240 calendar days, or 480 crewmember days. This equates to about 2.3 FTE.
- **Line painting.** The numbers of crosswalks painted annually by Village staff are unknown. The majority of striping and cross walk painting is contracted out by the Village. If it can be assumed that a two-person crew is occupied throughout

the summer months completing this effort, this equates to about 0.5 FTE.

- **Pothole repair.** The numbers of potholes in a given year is dependent upon a variety of factors, including the initial condition of the road, the numbers of freeze-thaw cycles, and others. Although many pothole repairs are performed on a reactive, and even emergency, basis, the appearance of non-emergency pothole repair is expected, and the times for repair can be managed during specific periods. If it can be assumed that a 2-person crew expends 70 days during the spring and summer months repairing potholes, then this equates to about 140 crewmember days, or about 0.7 FTE.
- **Sidewalk and curb repair.** The Division is responsible for 316 linear miles of sidewalk and 384 miles of curb in the Village. The intensity of maintenance required for these relatively labor-intensive units of infrastructure depends heavily upon their condition and need for total reconstruction. However, assuming an average condition, the staffing required would be about one (1) FTE per 100 linear miles of curb, and one (1) linear mile of sidewalk. This would indicate the need for approximately four (4) FTE to maintain an acceptable condition for curb and sidewalk.
- **J.U.L.I.E. Locates.** The Division is required to respond to requests from residents and businesses to indicate the locations of underground utilities prior to digging. Interviews indicate that the Division responds to about 8,000 of these requests annually. In the project team's experience, an experience worker is capable of accomplishing about 2.5 such locates per hour, if the routing is efficiently accomplished. This would indicate that about 3,200 hours are required for this activity annually, or about two (2) FTE.
- **Sign Maintenance and Installation.** There are reportedly between 25,000 and 30,000 signs in the Village. The project team utilizes a benchmark of between 8,000 and 12,000 signs per Maintenance Worker to accomplish their required installation, maintenance and repair. This indicates the requirement for approximately two (2) FTE.
- **Traffic Signal and Street Light Maintenance.** The Division allocates one Electrical Maintenance Technician to the repair of traffic signals and street lights. The position is assisted as needed by other non-skilled workers to provide traffic safety and other miscellaneous duties from time to time, however this position accomplishes the primary technical workload of the Division in this area. The project team utilizes a ratio of 35 signalized intersections per traffic maintenance worker. With 11 signalized intersections, this indicates the need for only approximately one-third (0.33) FTE. However, the position also maintains the Village's streetlights. With these duties, the Division is properly staffed with one (1) FTE for these functions.
- **Tree Trimming, Pruning and Removal.** The Division is in the process of

developing the Village's tree inventory. Therefore, there is no definitive number of trees maintained. However, the project team's experience in similarly-sized municipalities indicates that a three-person crew is required to actively maintain trees in the rights of way, and to respond to complaints relating to trees and branches in roadways, diseased trees, branches limiting site distances, and others.

- **Leaf Collection.** The Village provides a leaf collection program, which last approximately 10 weeks each fall. With a crew of four, this equates to the need for about 1,600 hours, or one (1) FTE

The total of the above workloads indicates that there is a requirement for between 16.6 and 17.0 FTE to accomplish the activities currently performed by the Division staff. However, the nature of public works functions is that there is a substantial amount of work that cannot be classified in one of the major work categories. For this reason, the project team utilizes a factor of 15% to account for the additional workload that cannot be anticipated, but must be accomplished. This would indicate that there is a requirement for between 19 and 19.5 FTE. The Division has a total of 19 full time, and 2 part time staff members, plus 2 transfers-in from the Utilities Division, for a total field maintenance staff of 23. However, the Foreman and Public Improvement Technician are not considered full time working staff members for purposes of this calculation, and the two part time workers will be assumed to equate to one (1) full time equivalent. This equates to a total of 20.0 full time staff, compared to the calculated need for 19 to 19.5.

In addition to the calculated workloads for the preventive maintenance and cyclical repairs, the Division also removes snow from Village roadways and sidewalks. Although much of this work may be performed on overtime, the timing of the need for snow removal is unpredictable, and may occur during the day, impacting routine work. Therefore, the calculated staffing for the required workload is minimally sufficient to

accomplish the preventive and routine, cyclical repair work on the Village's streets and stormwater system, however, the unpredictability of snow events may result in the lack of accomplishment of some required preventive maintenance.

The Division, and in fact the Public Works Department, has not instituted a work order and work reporting system that allows an analysis of the workloads that are being accomplished, and those that have not. Interviews indicate that it is most likely that routine preventive maintenance, such as the cleaning of catch basins, is not being accomplished to a sufficient degree. There are other areas that are most likely not being accomplished as well, due to factors that impact daily productivity, such as weather, travel, etc. Further, the Division is staffed so closely to the calculated staffing requirement that any significant utilization of the Division staff for snow removal that occurs during the time period that routine work would have been accomplished is likely resulting in the lack of accomplishment of all required efforts.

As noted previously, the lack of an automated work reporting system inhibits a more precise identification of areas in which the Division may be failing to accomplish workloads. Therefore, the project team recommends the analysis of Divisional workload accomplishments, either through the institution of a formal CMMS or by manual means, to determine any categories of work that are not being accomplished to a sufficient degree prior to adding staff.

Recommendation: The project team has calculated a required staffing contingent that is extremely close to the current staffing levels in the Division. There are, however, factors that may be causing the Division to fall short of accomplishing recommended preventive maintenance and required repairs to the streets and stormwater infrastructure. The project team recommends a thorough analysis of the workloads that are actually being accomplished, and those for which the Division may be falling short in order to determine the potential need for additional staff.

B. THE EQUIPMENT MAINTENANCE DIVISION IS STAFFED AT A LEVEL TO PROVIDE A MINIMAL LEVEL OF PREVENTIVE AND CORRECTIVE MAINTENANCE.

The Equipment Maintenance Division of Public Works is responsible for the preventive and corrective maintenance and repair of a fleet of 433 total units, with the following breakdown by category.

Category	Number
Sedan, Van	36
Heavy Van, Pickup	72
Police Patrol Vehicle	53
Heavy Equipment	52
Trailer	16
Pump, Generator	157
Mower	41
Boat, Motorcycle	6
Total	433

The maintenance and repair of the above 433 units is accomplished by three (3) ASE-certified Equipment Mechanics, supervised by the Division Manager. Automotive parts are supplied to the mechanic staff by a Parts Room worker.

The project team utilizes two methods to determine the adequacy of staffing for vehicle repair and maintenance. The first is a vehicle to mechanic ratio, which compares the larger-engine, rolling stock to the number of mechanic staff. The number of rolling stock, identified in the table above, is 213, and includes the sedan, vans, pickups, patrol vehicle and heavy equipment. Dividing this number by the three (3) mechanic staff yields a ratio of 71 to 1, which is well above the benchmark range of 52 to 55 for a typical municipal fleet mix.

The second, and more precise, ratio is that of the cost of maintenance and repair per vehicle equivalent unit (VEU). The use of VEUs is an improvement over the simple statement of the numbers of vehicles and pieces of equipment since not all require the same intensity, and thus cost, of maintenance and repair. The baseline for

maintenance and repair is a sedan, which is defined as requiring one VEU. A Police patrol vehicle, on the other hand, requires more maintenance, and is assigned a VEU of 2.5. Heavy equipment, such as backhoes, loaders, dump trucks, etc., require an even greater level of maintenance, and are assigned a VEU of 5. The following table provides a calculation of the total number of VEUs in the Orland Park fleet.

Category	Number	Equivalency Factor	VEU
Sedan, Van	36	1.0	36.0
Heavy Van, Pickup	72	1.5	108.0
Police Patrol Vehicle	53	2.5	132.5
Heavy Equipment	52	5.0	260.6
Trailer	16	0.1	1.6
Pump, Generator	157	0.5	78.5
Mower	41	0.5	20.5
Boat, Motorcycle	6	1.0	6.0
Total	433	NA	643.1

As the table above shows, although there are 433 vehicles and pieces of equipment in the fleet, there are 643.1 vehicle equivalent units, or VEUs.

The project team utilizes a benchmark cost range of \$825 to \$1,345 per VEU to assess the reasonableness of cost for vehicle maintenance and repair. This cost includes all direct personal services (i.e., no supervision, parts runner, clerical staff, etc.), parts, and contracted repairs. Excluding from the Division's budget the costs for fuel and capital, the total Divisional cost for direct maintenance and repair for FY 2011 is \$848,573. Dividing this figure by the calculated 643.1 VEUs produces a cost per vehicle equivalent unit of \$1,319.50, which is somewhat less than the upper end of the expected range.

The use of the two ratios to determine the adequacy of staffing in the Vehicle Maintenance function of Public Works provides slightly different results for each. The simplistic vehicle to mechanic ratio of 71 to 1 indicates a relatively high number of units per mechanic. On the other hand, the use of the cost per VEU indicates that the

Division expends a relatively high amount to maintain its fleet. And since the bulk of the cost in the Division is related to salaries and benefits, the relatively high cost may be attributed primarily to the number of staff maintaining the fleet.

There are a few mitigating factors in these analyses that should be noted. These include the following:

- Although the vehicle to mechanic ratio appears high (i.e., 71 to 1) in relation to the typical 52 to 55 vehicles per mechanic, the benchmark range is applicable to the “typical” municipal fleet mix, which includes fire apparatus and ambulances. These pieces of equipment are not present in Orland Park, as fire and EMS services are provided by a separate district, with equipment being maintained by that district. This effectively increases the total numbers of vehicles and pieces of equipment that can be maintained by a mechanic.
- The cost per VEU is, although at the high end of the range, still within the expected values. The use of cost figures per VEU is a useful metric, however it must be used with some caution when the staffing levels are in the low single-digits, as is the case in Orland Park. The implication of a high cost per VEU is usually that there are excess staff members maintaining the fleet. However, when starting at a base level of three mechanics, the elimination of one may reduce the effective cost per VEU into the “average” range, but has severe implications for the scheduling of preventive maintenance, the coverage by mechanics for an absence, and other practical matters.
- Finally, as is noted elsewhere in this report, the age of the fleet is extremely high, which requires a disproportionately greater expenditure to adequately maintain it. To reiterate, the average age of a sedan in the Orland Park fleet is 8.9 years. Pickups and vans are, on average, 8.5 years old, police cruisers are 4.9 years old, and heavy equipment of all types average 12.1 years. These *average* ages are all above the recommended economic life cycles.

Recommendation: Maintain the staffing of the Equipment Maintenance Division of Public Works at current levels.

(G.3) KEY OPERATIONAL ISSUES.

In conducting the evaluation of the Village’s operations, in addition to evaluating staffing and organizational structure issues, the project team evaluated various operational issues / service levels. The following section summarizes key

recommendations related to operational practices in the Finance Department identified by the project team.

A. MANAGEMENT SYSTEMS AND ACCOUNTABILITY

Management accountability is the expectation that managers are responsible for the quality and timeliness of program performance, increasing productivity, controlling costs, mitigating adverse aspects of agency operations, and assuring that programs are managed with integrity and in compliance with applicable law.

This chapter evaluates the management accountability practices within the two departments, as well as the management system infrastructure required to ensure that managers can monitor and report their status and progress against accepted measures of accountability. This includes goals, objectives, and performance measures; and a communication plan designed to inform and engage Village management, staff and Selectmen.

1. THE PUBLIC WORKS DEPARTMENT SHOULD DEVELOP AN ASSET MANAGEMENT PLAN TO ENSURE THAT LIMITED RESOURCES ARE FOCUSED ON MAINTAINING THE INFRASTRUCTURE OF THE VILLAGE IN THE MOST EFFICIENT AND EFFECTIVE MANNER.

Like many municipalities across the country, the Village of Orland Park is experiencing downturns in revenues that have forced it to curtail services and invest less in the maintenance of infrastructure. The two departments in this study have been affected by this trend, along with other departments in the Village. This is evidenced by:

- The resurfacing of only about 1.7% of the roughly 415 miles of paved surfaces per year for the past three years. This compares to industry standards of between 5% to 8% of paved surfaces.
- Replacement of only about 0.4% of water mains annually in the past five years.

- An aging Village-wide fleet. The average age of the Village's non-Patrol fleet of administrative vehicles (i.e., sedans, small vans, pickups) is 8.9 years. This is above the expected total life span for this type of vehicle. Heavy on-road vehicles (vans, pickups) average 8.5 years, and the patrol fleet averages 4.9 years.

Clearly, investments are needed to repair and rehabilitate the Village's infrastructure and to enhance essential services. However, because of the current financial situation, the Village is unable to invest the resources that may have been available in prior years. Therefore, the Village has three broadly defined ways to confront this situation in the short-term:

- Impose new fees or increase existing fees.
- Scale back the range of services that the Village provides, via the Public Works Department, and/or reduce the level of services provided.
- Enhance the efficiency and effectiveness of existing operations.

There is a reduced amount of development occurring in the Village currently. Therefore, the imposition of new fees, or even increasing existing fees, cannot be viewed as significant alternatives to fill the funding gaps. Similarly, the two departments in this study provide only basic services, and scaling back these services cannot be accomplished without a risk to the infrastructure itself.

The Public Works Department has initiated an effort to geo-code the locations and attributes of the Village's "horizontal" inventory, as it relates to the management of its assets. This includes the input of all of the infrastructure for which it is responsible (paved surfaces, pump and lift stations, underground infrastructure, etc.) into its computerized maintenance management systems (CMMS) for the purpose of scheduling preventive maintenance, identifying high-maintenance assets, etc., and reporting the achievement of all maintenance and repair performed on these assets.

However, the Public Works Department, as well as the Parks Operations and Building Maintenance divisions should consider the enhancement of the efficiency and effectiveness of existing operations, including the improvement of activity reporting and data accumulation, and the establishment of an asset management plan and performance measures that will define and report the progress, and improvement, of crews against definable objectives.

Asset management focuses on the facts about the Village's infrastructure assets, their performance, their preservation, and their anticipated longevity. Effective asset management is important for a number of reasons including:

- The Village's aging infrastructure, and associated risks and liabilities;
- Insufficient funding for asset renewal and rehabilitation, as described above;
- The increasing challenge of maintaining the safety and serviceability of the assets entrusted to the Public Works Department.

Effective asset management relies upon accurate asset information to facilitate decision-making regarding the condition and performance of those assets with a long-term view of their preservation and renewal.

Given the significant replacement cost of these assets, it is imperative that both the Public Works Department maximize the useful life of the assets for which they have responsibility. The actions that should be taken by these departments are presented below.

- Update the long-term plan for the water distribution and sewer collection systems. The Village should be replacing or rehabilitating an average of 1% to 2% of this infrastructure each year, but has replaced only 0.4% of its water mains in the past five years.
- Develop a long-term rehabilitation and replacement plan for the street system. Available funding has been sufficient to replace only about 1.7% of the paved

surfaces annually for the past five years, compared to a benchmark of between 5% to 8% on an annual basis.

- Commit to a five-year replacement plan to address deferred replacement requirements of the Village's vehicles and equipment.

Both the Public Works Department and Parks divisions need to address these challenges in the rehabilitation and replacement of the Village's assets, and can address the challenge of asset renewal and rehabilitation, in part, by enhancing the effective deployment of their staffs, and not relying solely on capital improvement program funding.

The framework for an asset management plan can be described in terms of seven questions.

- What do we have and where is it? (Inventory)
- What is it worth? (Costs/replacement rates)
- What is its condition and expected remaining service life? (Condition and capability analysis)
- What is the level of service expectation, and what needs to be done? (Capital and operating plans)
- When do we need to do it? (Capital and operating plans)
- How much will it cost and what is the acceptable level of risk(s)? (Short- and long-term financial plan)
- How do we ensure long-term affordability? (Short- and long-term financial plan).

The asset management policy is the starting point for unifying asset management practices across the departments. Without this, alignment and consistent management control is not possible.

The two departments should develop formal, written policies and procedures regarding asset management that is related to clear goals, objectives, and measures of

performance. These should define organizational roles and responsibilities in the implementation of the asset management policy and procedure. The specific aspects of this policy and procedure are presented below.

- Goals and objectives reflect a comprehensive, long-term view of asset management.
- Policy goals and objectives are comprehensive, and integrated with other Village policy objectives, and supported by quantitative and measurable performance measures or criteria.
- Principles of good asset management are articulated in the policy and procedure and clearly recognized as the driving force for resource allocation and utilization.
- The goals and objectives support the preservation of existing infrastructure assets.
- Goals and objectives embody the perspective of life-cycle economic analyses of asset performance and cost, and encourage strategies with long-term benefits.
- The goals and objectives recognize the importance of reliable information on asset inventory and condition.
- The policies should encourage the development and updating of long-range asset management plans (e.g., water and sewer master plans) to provide clear and specific guidance for the capital program development process.
- The policies include criteria for allocating resources, setting program priorities, and selecting projects consistent with stated policy goals and objectives and defined performance measures.
- The policies should require the regular, ongoing collection of information on the condition of assets.
- The policies should require the use of information on changes in asset condition over time to develop and improve forecasts of asset life and deterioration.

The Village's asset management policies and goals will define its most important priorities with regard to allocation of scarce financial resources. In summary, the project team recommends that the two departments develop asset management policies and procedures for the consideration of the Village Manager and Village Board of Trustees.

Recommendation: *Develop an overall asset management plan for the management of the infrastructure and assets for which the two departments have been given responsibility.*

2. THE PUBLIC WORKS DEPARTMENT SHOULD CONTINUE TO DEVELOP ASSET INVENTORIES FOR THE ASSETS ASSIGNED TO IT FOR MAINTENANCE AND REPAIR. THE PARKS DIVISION SHOULD BEGIN THIS EFFORT IN CONJUNCTION WITH THE DEPARTMENT OF PUBLIC WORKS.

The Public Works Department should continue to develop a comprehensive inventory of its assets. The Parks Division of the Parks and Recreation Department, including Parks Operations and Building Maintenance, should both begin this effort as soon as possible. To develop this comprehensive inventory, these two organizations should take the following steps:

- **Identify the objectives of the computer maintenance management system, including how the asset inventory data will be utilized to maintain and repair these assets.** Understanding how the asset inventory data will be utilized is necessary to identify the data to collect. Data could initially be utilized to establish a preventive and corrective maintenance program. In the longer term, data could be utilized to document the asset maintenance, repair, rehabilitation, and renewal expenditures as a percentage of current replacement value. Not all data needs to be collected initially. Some may be essential to the initial phase of the deployment of the CMMS, while others, such as current replacement value, can be collected during later phases. It is unrealistic to expect that all objectives of the CMMS will be achieved at once. Public Works should start with the most important and expand the data within the system over time.
- **Identify sources of pertinent data.** Once the required data for the CMMS is defined, the Department must determine how to obtain the data and how it will be entered. Necessary data is currently in paper and electronic records or must be documented and collected.
- **Determine who will collect and enter the initial asset inventory.** The collection of data is time intensive and costly, and will not be accomplished by personnel dedicated solely to this task. Rather, given the current economic climate, this will be an effort that takes months to accomplish, and must be conducted by multiple personnel in each of the component divisions of the Department.
- **Assign responsibility for updating the asset inventory data.** The time and expense of collecting this asset inventory data will be wasted unless the

inventory is kept current. The responsibility for updating this asset inventory needs to be clearly assigned.

- **Consider how the information will be collected and transferred to the CMMS.** Consider if new forms should be created or if the information could be collected using handheld electronic devices.
- **Document specific asset inventory data to be collected as well as the quality control procedures.** In addition to identifying the data entry and collection staff, determine how the data will be quality controlled. Data validation must ensure accuracy and identify inconsistencies and potential problems, particularly during the early stages of the data collection.
- **Establish a timeline for data collection and a project manager responsible for managing data collection on a Village-wide basis.** The Public Works Department and the Parks Operations and Building Maintenance divisions should develop a schedule for data collection and clearly assign responsibility for managing this process.
- **Before beginning the initial asset inventory, install and familiarize all data collection personnel with software and hardware tools, the required data and data collection and entry procedures.** Training could be provided to all team members. Since the initial inventory will involve manual data collection, the Department could develop electronic forms to gather the information in the field.
- **Conduct a pilot program.** Completing a pilot program is an important part of making sure the asset inventory data collection meets needs and expectations. The assets selected for the pilot program should be limited in size. Once pilot program data are in the system, both the data and the process could be reviewed and quality controlled. Based upon the findings of the pilot project, the Department could revisit the timeframe for collecting the asset inventory data.

Collecting asset inventory data doesn't necessarily require a large up-front investment of time and money. Instead of collecting all asset inventory data from the beginning, a phased approach would allow the departments to start small and gradually grow the inventory. A phased approach would allow the adoption of a system and set of procedures that are affordable and effectively meet immediate goals, but also flexible enough to grow with the changing needs of the departments.

Recommendation: Develop an inventory of the infrastructure and assets for which the Public Works Department and the Parks Operations and Building

Maintenance divisions have responsibility. This should include a definition of the assets to be collected, assignment for collecting data, and a schedule for the collection of data.

3. THE PUBLIC WORKS DEPARTMENT, AND THE PARKS OPERATIONS AND BUILDING MAINTENANCE DIVISIONS SHOULD PURCHASE AND INSTALL A COMPUTERIZED MAINTENANCE MANAGEMENT SYSTEM.

It was noted above that a primary means by which the departments can confront the recent decrease in available funding to invest in infrastructure renewal is through enhancing the productivity of the workforces. This is one of the main functions of a CMMS. However, another less-obvious benefit of a well-functioning CMMS is in assisting managers in controlling service levels.

The project team recommends that the Village purchase and install a computerized maintenance management system (CMMS) for use in each of its infrastructure maintenance departments and divisions. Regardless of the CMMS selected, the system should have two primary goals: increased productivity and control of levels of service.

- The benefits of increased productivity are that the same work levels may be accomplished at less cost, or more work will be accomplished for the same cost, with work quality remaining constant.
- The benefits of effective service-level control are not so obvious. Maintenance managers typically think in terms of increased performance without considering the impacts on the quantities of work accomplished. For example if productivity of pothole patching is doubled, should twice as much pothole patching be performed, or should the resources be released for some other kind of work? How much work should be performed – and what service levels should be attained – activity, by activity? The point is that increased productivity is less meaningful if no effort has been made to identify how much is to be performed and to control that level of service.

The Public Works Department, and the Parks Operations and Building Maintenance divisions of Parks should develop and install a maintenance management

system to enable the identification of the services provided (e.g., sewer main flushing), the levels of service (e.g., HVAC filters changed once every three months), the outputs of each of these services (e.g., the linear feet of sewer mains cleaned), and the cost of those services in terms of the total cost and the cost per unit of output.

This maintenance management system should be utilized within each of the divisions responsible for maintaining infrastructure. The components of a successful maintenance management system include the following:

- Document the number and type of maintenance features (physical assets) and the condition of these features. These are major factors in determining the types and amounts of work needed.
- Maintenance management is based upon work activities. Work activities should be defined for the significant maintenance work that is performed. Definitions should include an activity code, title, description, work unit and inventory unit. Such complete descriptions of activities are referred to as Activity Guidelines and provide standards of performance for individuals and crews by setting forth the quality and quantity of results anticipated from each activity.
- An annual work program and budget should be prepared. The activity-based work program and budget represent the products of the planning process and summarize the kinds and amounts of work planned, the productivity of the work force, and the costs of the planned work. It also provides the basis for managing the annual work effort.
- An annual work calendar should be prepared showing the monthly distribution of planned maintenance activities. Labor, equipment and material resource requirements needed to accomplish the planned workload are also identified.
- Work scheduling procedures should be developed. The preparation of annual, seasonal and short-term schedules, as well as daily plans, can provide guidance in achieving annual work program goals.
- Reports that will enable showing work accomplishment and cost data and a comparison of planned and actual work program accomplishment should be prepared. These should comprise a primary piece of the monthly work report provided by the Department Director to the Village Manager.
- Linking a database and geographic information systems (GIS) provides more options to analyze asset information.

- A GIS can display asset symbols on a map with links to their corresponding database records. The GIS provides the ability to analyze data based on geographic information, allowing patterns to emerge on a map that may not be as obvious in rows and columns of data.
- Asset information can be shared in a visual format that is often better understood by others, including the Village Board of Trustees and the public.
- Finding an asset's location is faster and easier with the help of a map.

The steps that need to be accomplished before the automated maintenance management system can be effectively utilized are described in the following sub-sections.

Recommendation: The Public Works Department and the Parks divisions of Parks Operation and Building Maintenance should purchase and install a computerized maintenance management system to develop an annual work program and scheduling plan. This CMMS should be the primary vehicle by which the organizations report on work activity and the productivity of the resources utilized in accomplishing work in accordance with the work plan.

4. A COMPLETE INVENTORY OF WORK ACTIVITIES PERFORMED BY THE PUBLIC WORKS DEPARTMENT, AND THE PARKS OPERATIONS AND BUILDING MAINTENANCE DIVISIONS IN THE MAINTENANCE OF INFRASTRUCTURE ASSETS NEEDS TO BE DEFINED.

The managers and division superintendents in the Public Works Department, and the Parks Division's Parks Operations and Building Maintenance divisions should define the work activities performed by their crews. The superintendents need only assure that all of the primary work activities (i.e., pothole patching, sidewalk repair, plumbing fixture repair, athletic field maintenance, etc.) that consume the majority of staff work hours are defined. This would include all forms of leave. All 2,080 staff hours for each employee should be included within the system. The work activities need to be carefully defined to assure that the same terminology is used for the work performed by staff. Each of

these work activities should define the unit of measure. Examples of work activities and units of measure are provided below.

Work Activity	Unit of Measure
Pothole patching	Tons of asphalt
Base repair	Square yards
Skin patching	Square yards
Catch basin cleaning	Number of catch basins

The project team ensuring that the work activities used are comprehensive and meaningful in terms of their usefulness in management decision-making. Further, the data collected on these manual sheets should be entered into a CMMS.

Recommendation: Develop a comprehensive set of work activities performed by each division in the Public Works Department as well as the Parks Operations and Building Maintenance Division.

5. DEFINE THE LEVELS OF SERVICE TO BE PROVIDED.

Levels of service should vary depending on the type of infrastructure and intensity of use. For the purposes of maintenance management, service levels must be specific. Examples of specific service-level standards are:

- Digout and rebase shall be performed when the asphalt surface becomes badly cracked and does not adhere to the base (surface failure) or where there is evidence of base failure (such as rolling, pumping, etc.); and
- Crack and joint sealing shall be performed whenever cracks in asphalt reach 1/4-inch to 2 inches in width.

Some judgment will be needed in applying these standards, however they do provide specific and useful guidelines – in terms of what maintenance should be performed and what maintenance can be deferred. These standards are useful in determining the amount of work needed to attain desired levels of service. In some cases, these standards will also need to be expressed as quantitative standards as well.

Recommendation: The organizations providing infrastructure maintenance

should define the service levels that are appropriate to be accomplished.

6. PERFORMANCE STANDARDS NEED TO BE DEVELOPED.

The next step in deploying a maintenance management system is to define the work to be done. The work must be identified in terms that are measurable and that can be related to resource requirements on a consistent basis. The work activities are identified by name (such as pothole patching). These specific work activities account for most of the annual workload – typically 85% to 90%. The remaining 10% to 15% of the workload is usually comprised of relatively minor activities that can be grouped as “miscellaneous.”

A standard should be developed to define a level of service for a specific activity. That is, the standard is used to define the amount of work that needs to be done to provide the desired level of service. These are established largely on the basis of experience. Then that value can be used as a standard and may be adjusted upward or downward to raise or lower the level of service for, for example, pothole patching, response to building maintenance problems, etc.)

These standards are used to define the best way to accomplish each activity. The optimum crew and equipment complements are specified, along with the major materials needed and the preferred procedure for doing the work. Also, the expected amount of work to be accomplished each day is specified, based on using the standard over a period of time under average conditions. The Village of Orland Park’s departments that are responsible for infrastructure maintenance are relatively small, and it is more the rule than the exception that the work of a specific crew is interrupted to respond to either an emergency or to an activity with a higher importance. Therefore, it

may be more meaningful for the respective organizations to express expected work outputs not on a daily basis, but on a half-day, or even hourly, basis. Whatever output basis is selected, each standard should include at least six components:

- A brief description of the specific work involved – the work that is to be performed by the crew;
- The frequency with which the work should be performed (or the level of service) and the criteria for scheduling the work;
- The crew size required for the job;
- The equipment, material, and tools needed;
- The performance expectations for each job or average daily productivity; and
- The recommended procedures for completing the job.

A sample performance standard for cleaning culverts and pipes is presented in the exhibit following this page.

EXAMPLE OF A PERFORMANCE STANDARD

SAMPLE PERFORMANCE STANDARD FOR THE WATER & SEWER DIVISION

Activity No.: D-001	Activity Name: Cleaning Culverts and Pipes
Description and Purpose: Periodic inspection, cleaning and removal of debris as required from culverts and pipes, as well as adjacent ditches to ensure proper drainage. This includes, but is not limited to, driveways and entrance culverts.	
Schedule All culverts and pipes should be inspected and cleaned (if required) once annually. Typically, this will occur over the spring and fall, however, emergencies may occur throughout the year and should be corrected as emergency dictates, or as other routine, scheduled work allows.	
Authorized by: Division Superintendent	Level of Service: Ensure the free flow of water through pipes and culverts through the routine inspection and cleaning at least once annually.
Crew Sizes: 1 Equipment Operator II 1 Laborer II Equipment: 1 Dump truck 1 Backhoe	Work Method: 1. Place safety signs and devices at work site in accordance with MUTCD standards. 2. Remove debris and any other foreign substance, which impeded the flow of water from inlet and outlet channels, restoring original grade. 3. Clean out silted materials from pipe. 4. Check for damage to structure. 5. Report damage and/or need for other scheduled maintenance and repair to Superintendent.
Material: Sod Ready mix concrete Sections of concrete pipe Other, as required	Average Daily Production 2 – 6 per day

Recommendation: Once all activities have been defined, performance standards should be defined, which outline, for each major activity, the methods of accomplishment, crew sizes, levels of service, the probable materials needed, and the expected average daily production levels to be achieved. A sample of such a performance standard has been provided.

7. DEVELOP A FORMAL WORK PLANNING AND SCHEDULING SYSTEM.

This task would involve the development of a formal work scheduling system. The objective of this formal work scheduling system is to ensure that only the planned amount of work is done. After the annual work program is approved, superintendents must have a simple method of authorizing and scheduling work to ensure that the work program is carried out as planned. Usually monthly schedules are prepared, using the annual work calendar as a guide. To the extent possible, the planned work should be carried out and every effort should be made to stay on schedule.

If activities such as storm damage repairs and cleanup, snow removal, etc., are greater than planned, the work program will have to be adjusted or additional funds will be requested to complete the planned work. The following table shows an example of a format for developing an annual work program.

Sample Annual Work Program for Water and Sewer Maintenance

Work Activity	Labor Days		Amount of Work		Total Cost		Productivity	
	Plan	Actual	Plan	Actual	Plan	Actual	Plan	Actual
Storm Drain Cleaning	40	42	1,200 linear feet	1,764 linear feet	\$7,680	\$8,064	30 – 40 linear feet per day	42 linear feet per day
Hydrant Flushing	7	6	200 hydrants	180 hydrants	\$1,344	\$1,152	60 hydrants per day	54 hydrants per day

NOTE: This table is only an example and is not based on actual data from the Village

The Public Works Department currently utilizes a set of work production categories that facilitate reporting for motor vehicle tax reporting purposes. For example, Task Category 21 is “Street Sweeping”. Code 56 is “Sewer/Ditch Cleaning”, and so on. These codes may represent all activities in the Streets and Stormwater Division, but they should be re-examined to ensure that they capture the large majority of work efforts in the rest of Public Works as well. Further, the divisions responsible for infrastructure maintenance in the Parks Division should either create or re-examine any existing work activity codes they may be utilizing. As crews complete work for the day in the Public Works Department, they manually enter the hours expended per activity, the materials and equipment used, and the appropriate budget code. Although the presence of a manual work activity system such as is present in the Public Works Department for motor fuel tax purposes currently is a good first step, none of the data are being used to define the desired levels of service that *should* be provided.

Recommendation: The Department of Public Works, and the Parks Divisions of Parks Operations and Building Maintenance should develop a formal work planning and scheduling system.

8. A MONTHLY PERFORMANCE REPORT SHOULD BE GENERATED COMPARING PLANNED VERSUS ACTUAL PERFORMANCE AND COSTS.

This last step involves the development of a work reporting system. Daily Log Sheets should be instituted in each division of Public Works, as well as in the Parks Operations and Building Maintenance divisions of Parks to track labor, equipment, and materials used for maintenance activities. These log sheets should be standardized and used in all Village organizations providing maintenance-related services. Foremen and superintendents should promptly review these work reports to ensure that they were completed properly and to determine if the performance standards were substantially

followed. Significant variations should be followed up to determine the cause and, if necessary, take corrective action.

A system should be developed to summarize the daily work reports on a monthly basis to produce performance evaluation reports. Each Department Director should be required to provide a monthly status report to the Village Manager, which should be more than a simple statement of the work that was accomplished. It should reflect not only this, but also the efficiency and effectiveness of the resources utilized, and the degree to which the actual performance met the objectives stated in the monthly plan.

The performance measurement data generated by this report would include:

- A comparison of planned versus actual staff hours per work activity for the previous month and year-to-date for each work activity;
- A comparison of actual versus planned work output (miles of curbs swept by street sweepers) per month and year-to-date for each work activity;
- A unit cost analysis that compares the planned versus actual unit costs for each work activity per month and year-to-date; and
- A comparison of actual productivity (work output per staff hour) versus the expected productivity as stated in the performance standards.

Recommendation: Each Village Department providing maintenance services should generate a monthly performance report comparing planned versus actual performance and costs. The intent of the monthly performance report is to report actual accomplishments against the annual work plan. This report should provide the basis for directors' monthly performance reports to the Village Manager.

9. THE VILLAGE SHOULD CONSIDER THE ESTABLISHMENT OF FLEET MAINTENANCE AND MANAGEMENT AS AN INTERNAL SERVICE FUND.

Currently, the Public Works Department's Vehicles, Equipment and Transportation Division is responsible for the maintenance and management of the Village's vehicles and equipment, as well as the stocking and issuance of parts and fuel.

This is performed under the direction of the Division Manager, and by three Mechanics, who are responsible for a total of 256 metered vehicles and pieces of equipment (i.e., bearing odometers or hour meters). Additionally, the mechanics maintain 188 non-metered pieces of equipment, including such items as generators, pumps, weed whips, mowers, leaf blowers, etc. Automotive parts are stocked, disseminated and monitored by a Parts Clerk.

The Division records its work, and maintains a schedule of preventive maintenance, by unit, in an automated system, "CFA". Currently, the Division charges users only for the cost of fuel utilized in each vehicle, and provides invoices to the user departments for reimbursement of direct costs. Other services, such as the provision of maintenance and repair, development of equipment specifications and replacement plans, vehicle and parts stocking and disbursement are not charged to users, but are absorbed in the annual budget of the Public Works Department.

The assumption of the costs for equipment maintenance by the provider of services, in this case the Public Works Department, fails to provide incentives for user departments to govern their own use of vehicle maintenance and repair services. Further, given that the decision to repair or not repair is placed in the hands of these various user department ensures that vehicles and equipment will be maintained in disparate manners.

In a centralized vehicle and equipment maintenance organization, the "ownership" of equipment is typically transferred from user departments to the central maintenance organization. Although this is not universally the case, and does not necessarily inhibit the effectiveness of the delivery of services, it does ensure that

vehicle repair and replacement decisions are made on the same bases and sets of criteria, as opposed to being made by many different department managers, most of whom have no particular expertise in the field of vehicle management.

The establishment of a central vehicle maintenance and management organization in the Village would have many positive benefits. These include the following:

- An accurate accounting of each department's costs and usage of mechanic services.
- The operation of the vehicle maintenance shop on a business basis, requiring that rates be set, and charged, to ensure that the organization "breaks even" on a cost basis.
- The replacement of the Village's fleet of vehicles and equipment on the basis of the same criteria. The vehicles and equipment should be funded through a Replacement Fund that is funded by monthly user charges that ensure that sufficient funding is available at the end of the vehicle's useful economic life cycle.
- The monitoring of vehicle utilization by a central organization, with the authority of that central organization to remove under-utilized vehicles from the fleet, or enforce shared usage of specific units among certain departments.
- The ability of the Village to compare the costs of vehicle-related services to those available at local, private repair shops.

The establishment of a centralized vehicle maintenance and repair shop has many potential benefits. These come, however, at the cost of intensive oversight of costs and charge-back mechanisms. Therefore, the administrative infrastructure should be well established prior to embarking on this particular organizational move.

Recommendation: The Village should consider the transition to a centralized vehicle maintenance repair shop that is set up as an internal service fund, fully funded by user charges for services which are established to ensure that the shop breaks even on a cost basis at the end of each year. This organizational transition should be accomplished only after the establishment of the administrative infrastructure required to ensure a successful transition, including

the collection and analysis of all rate components, the establishment of a Vehicle Replacement Fund, with appropriate life cycles established for each piece of equipment, and with the transition of the ownership of the fleet to the central shop.

10. THE PUBLIC WORKS DEPARTMENT SHOULD ESTABLISH A PAVEMENT MANAGEMENT PROGRAM.

Streets represent the largest single capital investment for the Village of Orland Park. The Village has approximately 415 centerline miles of streets. Maintaining and operating these streets typically involves complex decisions about how and when to overlay or apply surface treatments such as seal coats to keep the street performing and operating costs at a reasonable level. The streets scheduled for paving in 2010 in Orland Park included 6.91 centerline miles, equating to about 1.7% of the total. If the Village sustained this each year, it would be on a 59-year cycle for street overlay and reconstruction. This cycle exceeds benchmarks by a significant margin.

The Streets Division reports that it has no formal pavement management indexing program, and that streets are visually assessed for condition and probable remaining life. The Public Works Department and the Village of Orland Park should take a number of steps to address these challenges.

There are many advantages to implementing a formal pavement management program over those of visually inspecting Village roadways. These include:

- Definition of pavement inventory and calculation of the Pavement Condition Index (PCI) and other distress indices.
- Accommodation of user-defined fields for customizing programs
- Modeling of pavement condition deterioration
- Analysis of pavement condition (past, present, and future)
- Estimation of funding needed to maintain pavements at a given condition level

- Estimation of funding needed to eliminate the backlog of maintenance and repair in a specified number of years
- Projection of consequences of pavement condition and a maintenance and repair backlog for a specified annual budget
- Formulation of pavement maintenance and repair projects
- Incorporation of graphics
- Capability of storing photos and other images in the database
- Incorporation of GIS

The project team understands the pressures of a limited budget in the Department, however, the advantages and relatively low cost of the software combine to make this acquisition cost effective.

(10.1) The Village Should Acquire a Pavement Management Software Program.

The Village of Orland Park should develop a systematic approach to the identification of its needs for preventive maintenance. There have been several pavement guides that can be adapted and used in the development of this systematic approach. These approaches should be designed to enable the Village to utilize a systematic, objective, and consistent approach to evaluate existing and future pavement condition of the Village's streets, and a means to help it manage its pavement maintenance expenditures cost-effectively.

A pavement management system consists of three major components:

- A system to regularly collect pavement condition data;
- A computer database to sort and store the collected data (e.g., American Public Works Association's MicroPAVER); and
- An analysis of repair or preservation strategies and suggestions of cost-effective approaches to maintain pavement conditions.

Implementation of the pavement management software will require the Village of Orland Park to take the following steps:

- **Data collection and pavement network definition.** This data collection would include the construction records for the street system. This data includes the age, surfacing thicknesses, and surfacing types for all sections. Good age data is essential to the performance of computerized pavement management models that generally rely on age as the basis for performance prediction curves.
- **Pavement condition assessment.** This step involves visually inspecting the pavement based on set procedures to establish the pavement condition index for the pavement. This should be done once every three years, with 33% of the streets being evaluated each year.
- **Pavement condition prediction.** This step involves utilizing the pavement management software to calculate the current pavement condition as well as predicting what the future pavement condition will be through the use of a family of performance prediction curves.
- **Formulation of maintenance policies.** This step involves the development of treatment alternatives (i.e., chip seal, microsurfacing, overlay, etc.), and the development of “trigger scores” for each surface treatment alternative. A “trigger score” is the set of conditions as defined by the condition indices, the performance curves, and any other pertinent data items under which a particular treatment would be feasible. For example, streets with a pavement condition index of 40 or less (out of a possible 100) would be a “trigger score” for reconstruction.
- **Budget formulation and scenario development.** In this step, multiple budget and maintenance scenarios would be developed that would model the amount of money that can be spent in any particular year of the analysis and its impact on the pavement condition index. The model uses the allocated money to “optimize” the pavement condition index. That is, a single strategy is selected for each of the analysis sections based on the overall benefit to the street system as a whole and on the available money.

The output from the pavement management software is a list of candidate streets with the appropriate surface treatment based on the input parameters, the input condition data, and the input budget. These candidate streets can be provided to the Finance Department as input to the five-year capital improvement program.

The pavement management system needs continual updating and improvement in the form of adjustments to the performance curves, updated treatment costs, and changes in the condition indices. In addition to the list of recommended candidate streets, recommendations must be made as to overall funding levels required to meet the pavement preservation goals of the Village. Running the model with a variety of budget scenarios would accomplish this.

The cost of publicly developed software, such as the American Public Works Association's MicroPAVER, approximates \$0.09 to \$0.12 per yard of pavement in the first year, with the cost dropping to about \$0.07 to \$0.10 in subsequent years.

Recommendation: The Public Works Department should acquire and implement a formal pavement management software system.

(10.2) The Village Should Utilize a Mix of Engineers, Maintenance Workers from the Streets Division and Possibly Interns to Evaluate Pavement Condition and Identify the Pavement Condition Indices.

The condition of the Village's street system should be evaluated over a three-year cycle using two two-person crews. Two two-person crews should be capable of evaluating the condition of two to four centerline miles of streets each day. Approximately two staff months will be required each year to evaluate the condition of the pavement. In addition, the Village should retain a consultant to provide initial training to these staff.

It is recommended that the Village utilize the pavement condition evaluation methodology developed by the American Public Works Association MicroPAVER. MicroPAVER's Pavement Condition Index (PCI) methodology received the American Society for Testing and Materials (ASTM) standard D6433-99. Standard D6433-99 is the only pavement rating methodology recognized for rating streets and parking lot pavements.

Recommendation: The Village should evaluate the pavement condition of its streets on a three-year cycle, with 33% of the streets being evaluated each year.

(10.3) The Public Works Department Should Develop Strategies for Addressing The Funding Requirements for Preventive and Corrective Maintenance of the Village's Street System.

The Streets Division should evaluate alternatives and develop recommendations for the consideration of the Public Works Director, Village Manager and Trustees to address the funding requirements required for effective preventive and corrective maintenance of the Village's street system. These alternatives should include consideration of:

- An increased allocation of general fund monies focusing first on preventive maintenance of the Village's streets and preventing streets from deteriorating to the point where reconstruction is required;
- One-time ad hoc monies that could be used for reconstruction of streets; and
- Using other Village-controlled revenue resources for preventive maintenance such as CDBG and redevelopment.

The Streets Division should evaluate these alternatives after it has acquired and installed APWA MicroPAVER and after it has evaluated the pavement condition of at least one-third of the Village's streets.

Recommendation: The Streets Division should develop funding strategies for funding the preventive and corrective maintenance requirements of the Village's streets.

11. THE UTILITIES DIVISION OF PUBLIC WORKS IS MINIMALLY STAFFED TO ACCOMPLISH REQUIRED WORKLOADS AT THE CURRENT TIME, BUT MAY REQUIRE THE FILLING OF CURRENTLY AUTHORIZED BUT UNFILLED POSITIONS IN THE FUTURE.

In calculating the workload requirements for the Utilities Division, the project team utilized the following reported infrastructure:

- 351 miles of water distribution line

- 250 miles of sewer collection line
- 4,493 hydrants
- 4,114 valve vaults and valve boxes

Knowing these figures for the basic water and sewer infrastructure, the project team utilized benchmarks of probably workload activity for the division's crews. These included the following:

- The number of water main breaks and cave-ins typically approximates one per 8 to 10 miles of the system. Using the midpoint, this equates to a probable number of 39 per year, which typically require a crew of 3 a total of 5 hours to repair, or 15 person-hours per event.
- Water lines should be flushed once per 3 to 4 years. With 351 linear miles of distribution line, this equates to flushing about 100 miles of the system annually.
- Sewer lines should be cleaned once per three years. With 250 miles of collection line, this equates to cleaning about 83 miles annually.
- Experience indicates that about 1.5% of all hydrants will require repair each year. With 4,493 hydrants in the Village, this equates to about 67 repairs annually.
- Ten percent (10%) of the Village's sewer line should be televised annually to identify inflow and infiltration in the system and proactively treat this common problem. This would require the televising of about 25 miles of the system per year.

With these assumptions, the required numbers of proactive and preventive hours were calculated for the Utilities Division of Public Works, and are presented on the following page. Note that the total number of person-days is calculated at 1,082.8, which equates to 8,662.4 person hours. If each FTE is available for 1,650 hours per year, the required number of Water and Sewer crew members would be 5.2, or 6 FTE, simply to accomplish the proactive events in order to properly maintain the Village's distribution and collection system. Given that there is a total of 14 staff members in the

Division, this leaves 8 staff members to accomplish the reactive, or emergency, workloads of the Division, as well as the routine, daily tasks such as JULIE locates, resident contacts, work order investigation, contactor coordination, water shut-offs, meter services, etc. Interviews with Division staff indicate that there are 4.5 employees dedicated to these activities, bring the total staff contingent dedicated to preventive maintenance and routine services to 10.5. If the only reactive work were represented by main breaks, sewer line blockages and hydrant repair and replacements, the project team calculates this reactive workload at 3,802 hours, or 2.3 FTE.

In summary, the Utilities Division's staffing total appears to be sufficient to accomplish at least a minimal preventive maintenance program, handle routine daily tasks related to customer service, and to address the primary reactive workloads. However, the Division also appears to be at a point at which an aging infrastructure will likely require additional staff in the very near future. This is circumstantially validated by the fact that the Village has reportedly replaced only 7.47 water line in the past five years, equating to far less than 1% on an annual basis during the time period. This compares to AWWA suggested benchmarks of 1% to 2% annually. The infrastructure is aging, and the Utilities Division's current staffing will likely be insufficient to keep up with the demands of this aging infrastructure.

Recommendation: The Utilities Division is meeting a minimal preventive maintenance program, as well as the daily requirements of customer service. However, the failure to replace the underground infrastructure on a timely basis may result in the increasing frequency of failures in the future, thereby forcing a reallocation of staff to reactive maintenance rather than preventive. The project team does not, at this time, recommend the addition of personnel to this Division, however, it is likely that once a CMMS has been in place for any extended period, the Division, and Village, will recognize the need to fill the vacant positions currently in the Division.

**Proposed Annual Work Program
 For the Water and Sewer Division**

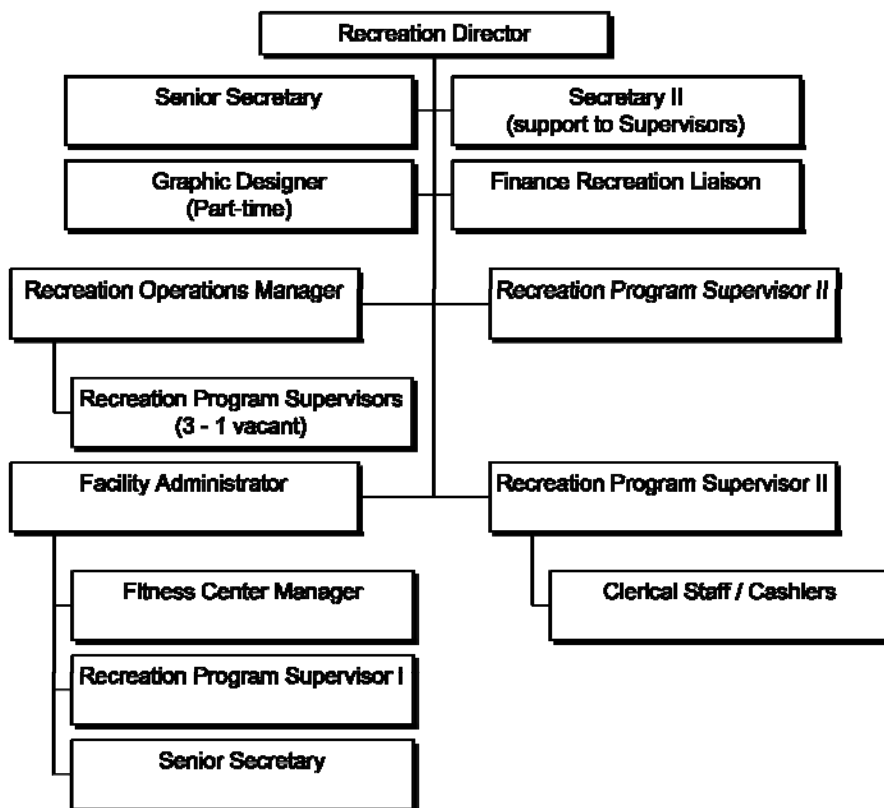
Activity Name	Inventory Measure	Units	Annual Frequency	AWQ	ADP	Crew Days	Crew Size	Staff Days
Water Line Flushing	Miles	351	0.28	100.0	0.71	141.2	2	282.4
Sewer Line Cleaning	Miles	250	0.33	83.3	0.71	117.3	2	234.6
Sewer Line Televising	Miles	250	0.1	25.0	0.13	188.6	3	565.8
Total Proactive/Preventive Events								1,082.8

AWQ = Annual Work Quantity
 ADP = Average Daily Productivity

H. RECREATION DEPARTMENT.

The Recreation Department serves the residents of Orland Park by providing a full-range of recreational, sports, and fitness programs and services including operation of a Water Park and Fitness Center in addition to the traditional recreation programs. Full-time staffing allocations are maintained at a lower level due to the extensive and high utilization of part-time and seasonal employees to provide services. The following organizational chart outlines the current staffing allocations:

**Recreation Department
 Current Organizational Structure - Regular Positions**



The following table summarizes the evaluation criteria utilized and the findings that resulted from the evaluation of the organizational and operational practices of the Recreation Department:

Evaluation Criteria	Key Comments / Observations
<p>Alignment with Organization criteria such as:</p> <ul style="list-style-type: none"> • Facilitates objectives and policies • Facilitates decision making and planning • Facilitates management of operations • Access to key decision making and planning • Critical functions near key managers • Key programs with organizational prominence • No gaps or overlaps in services • Similar functions are grouped together 	<ul style="list-style-type: none"> • Staff have access to their key decision makers. • Programs are placed at appropriate levels within the organization. • No significant gaps or overlaps in service exist with exception of dedicated resources to marketing / membership for Sportsplex / CPAC.
<p>Alignment of Staffing / Managerial Control criteria such as:</p> <ul style="list-style-type: none"> • Span of control is “appropriate” • Decision making at line level where possible • Roles and responsibilities are clearly defined • Distinction of roles among staff are clear • Management systems support structure 	<ul style="list-style-type: none"> • No span of control issues were present in most aspects of the organization. The greatest span of control at present (for full-time staff) is the Director. • Generally, roles and responsibilities among staff are clear. • The special events function has been distributed among all staff due to the loss of one position. This has resulted in differential level of service and preparation for these events. • The level and number of managerial positions is appropriate.

Evaluation Criteria	Key Comments / Observations
<p>Alignment with External Entities / Organizational Design Practices:</p> <ul style="list-style-type: none"> • Organization structure and makes “common sense” / “meets industry standards” or “best management practices” • Effort to make the organization “flat” / maximize managerial positions • Staffing levels are in line with recognized “best management practices” and associated workload / service levels. 	<ul style="list-style-type: none"> • The overall organizational structure, designed based upon function / service provided, is appropriate. • Staffing levels are generally in-line with expected staffing allocations for an operation the size and complexity of the Village of Orland Park’s Recreation Department with the following exceptions: <ul style="list-style-type: none"> - The implementation of on-line class registration / payments should enable the reduction of one staff member over time. - The lack of a marketing position for the Sportsplex/Aquatic Center may impact future utilization levels. - The level of graphics support is not sufficient for the organization. There is an unmet need that cannot be handled by a part-time position. - Vacant unfilled Recreation Supervisor position requires that the Recreation Operations Manager continue to play a large daily role in overseeing the Preschool, Daycamp, and After-school programs in addition to assuming oversight and supervisory responsibility for all Recreation supervisors. Longer-term this vacancy should be filled when finances warrant. • Given the level of interaction between Recreation and Parks Maintenance, a business case exists for inclusion of some portions of this function into Recreation as one alternative or at a minimum a more defined service level agreement for maintenance functions.

(H.1) KEY ORGANIZATIONAL ISSUES.

The following points summarize the key findings regarding the organizational structure and management staffing in the Recreation Department:

- Should the park maintenance / athletic field maintenance function be incorporated into the Recreation Department?
- With the implementation of on-line class registration and on-line payments require the existing staffing levels of administrative support personnel?
- Should a position be added to the staff of the Sportsplex and Centennial Park Aquatic Center to handle marketing and membership services?
- Can the organization’s need for graphics support be met with a part-time position?

- Should the vacant Recreation Supervisor position be filled?

The project team has identified, as alternatives, the following recommendations address each of these organizational issues. The table below, provides a summary of the benefits and issues that may result from making these changes.

Alternatives / Recommendation	Benefits	Issues
<p>The Village should not incorporate maintenance activities within Recreation at this time.</p>	<ul style="list-style-type: none"> • While the close interaction between park maintenance/athletic field maintenance and programming exists, the lack of quantifiable data about maintenance levels and staffing needs warrants not pursuing at this point in time. 	<ul style="list-style-type: none"> • The potential exists for greater efficiency to be achieved by having all maintenance functions, including parks and athletic fields, incorporated within the Public Works Department. • With maintenance functions reallocated to Public Works from Parks, the Recreation Department should work with Public Works to develop an internal service agreement outlining service levels for field maintenance, Sportsplex and CPAC. • These functions must be fully integrated in the maintenance management system in order to acquire data necessary to fully evaluate performance.
<p>The Village should reevaluate staffing needs for administrative personnel following the implementation of on-line class registration and on-line payments and target reduction of one position.</p>	<ul style="list-style-type: none"> • The position reduction can be utilized to meet other, higher pressing needs with the Village as outlined in other recommendations contained in the report. • The project teams experience with other communities implementing on-line class registration and payments is that workload associated with these activities should drop by 25% within one year. 	<ul style="list-style-type: none"> • Initial implementation of online class registrations and online payments may take extra staff time and effort during implementation period. • Staff will need to adjust to new approaches to handling scheduling and payments to improve processes.

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Alternatives / Recommendation	Benefits	Issues
<p>Longer-term, the Village should consider implementation of a Marketing / Retention position to handle memberships at the Sportsplex and Centennial Park Aquatic Center..</p>	<ul style="list-style-type: none"> • To maintain a cost-recovery target at the Sportsplex and market the CPAC, the Village must have time and staff resources dedicated to the selling of memberships, membership retentions, marketing efforts, etc. • Short –term this function could be provided with a part-time position to determine success and minimize costs. 	<ul style="list-style-type: none"> • Added cost for a new position could be potentially offset with reduction in administrative support costs.
<p>The Village should maintain the current part-time graphics position but continue monitoring the needs of the organization.</p>	<ul style="list-style-type: none"> • While identified as an issue during interviews and analysis, the implementation of a full Public Information Office may negate the short-term need for more graphics capabilities dependant upon the person filling that role. • Additionally, while a full-time graphics technician would easily meet the identified needs of the organization, the consolidation of the Special Events under a single individual may provide for better and more long-range planning that will enable the existing resource to better prioritize work activities. 	<ul style="list-style-type: none"> • Longer-term, a full-time graphics technician may be necessary. • While the position would be located within Recreation and devote a majority of time to this Department, services from this position should support the needs of other Village Departments and positions, especially the Public Information Officer.
<p>Longer-term, the Village should refill the current vacant Recreation Supervisor position.</p>	<ul style="list-style-type: none"> • The creation of the Recreation Operations Manager position was designed to provide a mid-supervisory level between the Recreation Supervisors and the Director. • At the present time, the Operations Manager remains responsible for the daily program oversight for afterschool programs, day camps, preschool programs, etc. There are no other full-time staff in this functional area. 	<ul style="list-style-type: none"> • The level of programs and participants, in addition to the associated paperwork related to the daycare, afterschool, and preschool programs, warrants oversight by a full time Recreation Coordinator. • Longer-term, the currently vacant Recreation Coordinator position should be refilled as financial resources permit.

Recommendation: *Following implementation of the on-line registration and online payments features for recreation classes, the Village should reevaluate the necessity of existing administrative support staff and target reduction of one position.*

Recommendation: *The Village should consider the implementation of a Marketing / Retention position for the Sportsplex / CPAC on at least a part-time basis.*

Recommendation: *The current approach and level of staffing for graphics should be maintained in the short-term under other organizational and operational changes are implemented. Longer-term, a full time position may be warranted.*

Recommendation: *The vacant Recreation Coordinator position should be filled in the mid-term to enable the Recreation Operations Manager to fully transition to duties of that position and provide a full-time staff member to oversee the afterschool, preschool, and day camp programs.*

(H.2) KEY OPERATIONAL ISSUES.

In conducting the evaluation of the Village's operations, in addition to evaluating staffing and organizational structure issues, the project team evaluated various operational issues / service levels. The following section summarizes key recommendations related to operational practices in the Recreation Department identified by the project team.

(A) The Recreation Department Should Periodically Conduct Cost of Services Studies for Recreation Programming.

The Recreation Department has not conducted a formal fee study for a period of time. The Village of Orland Park should conduct a cost of services study for recreation fees to determine appropriateness of the current fees, relationship between fee revenues and cost of service provision, and the level of competitiveness with surrounding communities. This study should be used to ensure that individual fees charged are (1) appropriate and in proportion to the staff time required for review and processing; and (2) at a level to sufficient to cover full cost of services provided or to

meet the level of cost recovery adopted by policy. The Village conducted a similar review internally approximately three years ago. A comprehensive fee study should be conducted, on average, once every five years with annual adjustments as necessary.

Recommendation: The Parks and Recreation Department should conduct a formal cost of services study for recreation programming.

(B) The Recreation Department Should Fully Implement the Online Capabilities of Class to Handle Registration and Payments.

The Recreation Department utilizes Class a common software system in place nationally (with hundreds of municipal clients), for the administration of the Recreation programs provided in the Village of Orland Park. This software is designed to handle program registration, process payments, and manage classes. Currently, no on-line capabilities for program registration are available nor can any fees be paid online.

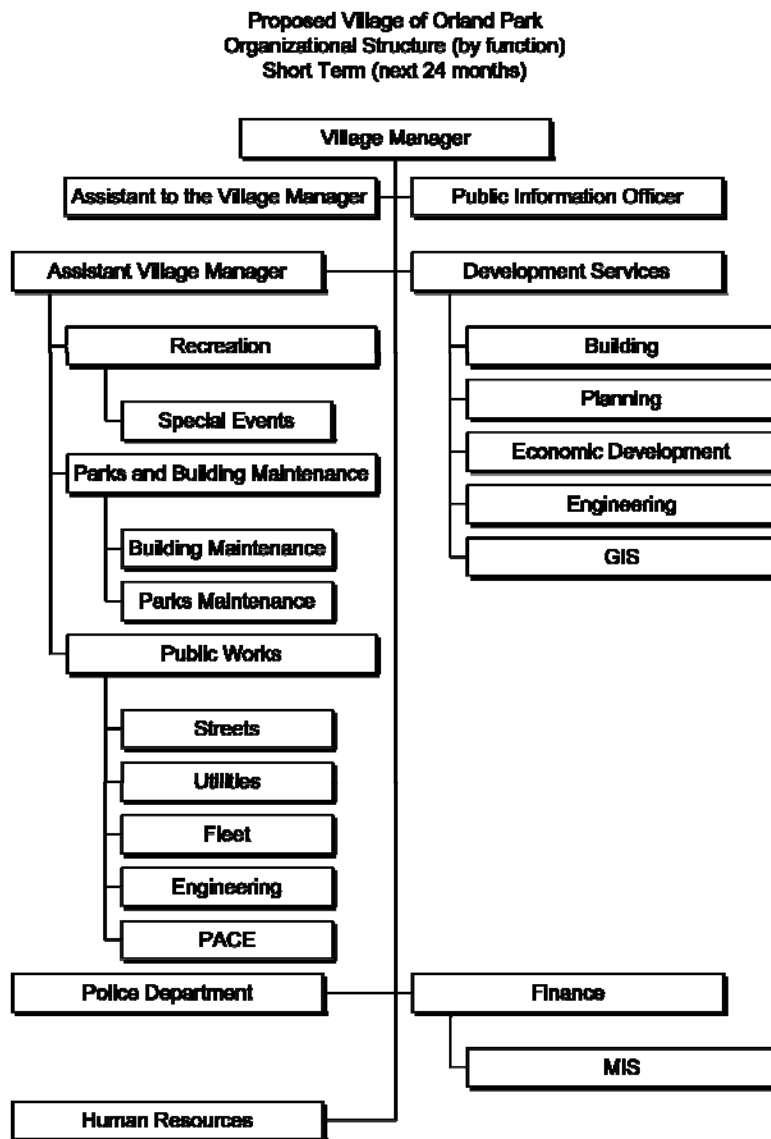
The Department should implement the on-line access to the recreation programs for registration and payments. The ability for program participants to enroll on-line, and pay program fees, would reduce the administrative functions that must be performed by professional staff and improve the overall service levels provided by the Department to the public. A resident will know immediately if space is available in a course without needing to mail in a program registration form, and wait for confirmation. Additionally, citizens and program participants have an expectation of being able to pay on-line with credit cards. For “high demand” programs, the system can be utilized to handle “lottery enrollments” as well as special requests such as placing individuals in the same course as friends / acquaintances. The system is able to work with a variety of credit card payment options to implement this feature. The Village is in the process of implementing on-line registration capability for the residents of Orland Park. This effort

should be given high priority due to the potential to increase services to the public and reducing staff workload in handling registrations.

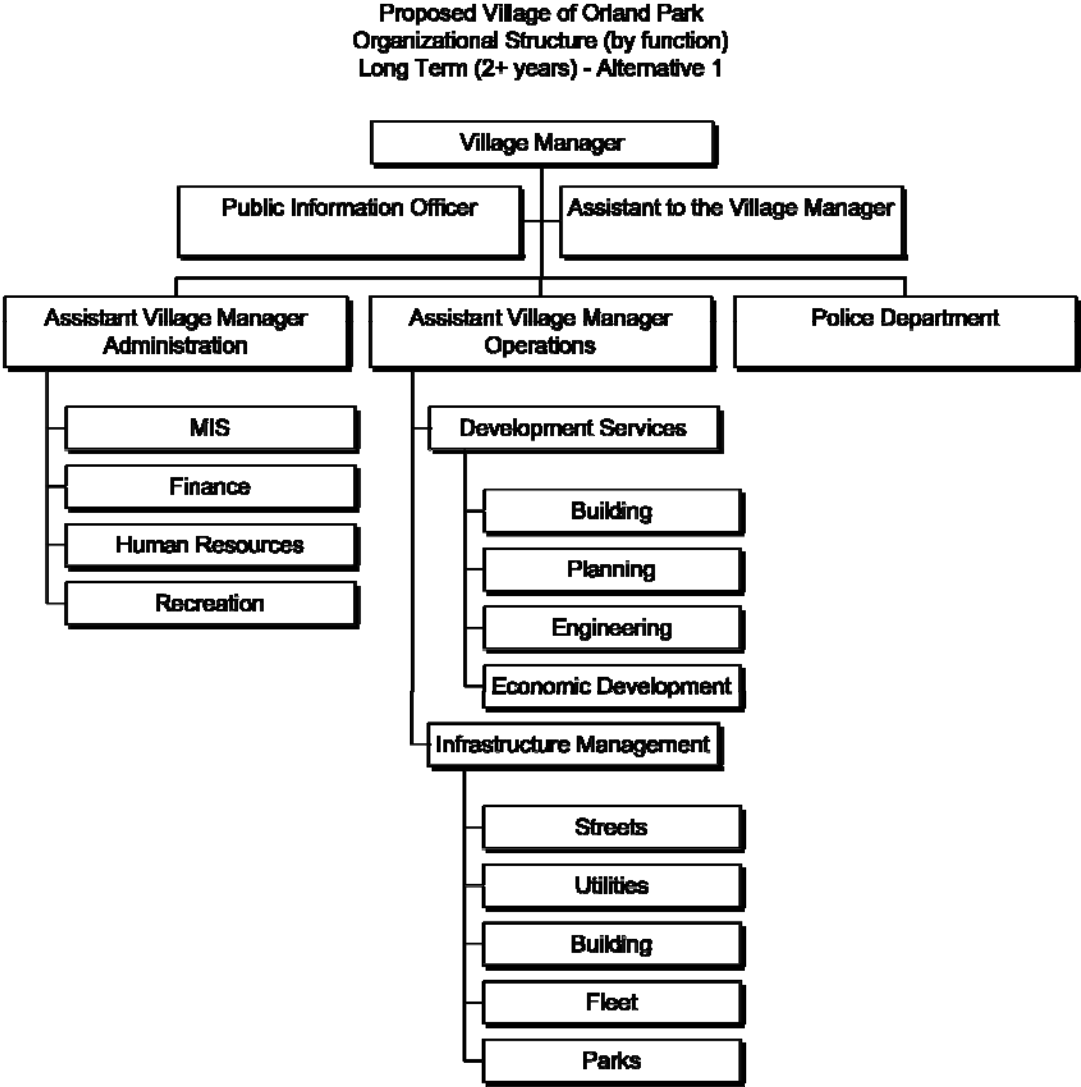
Recommendation: The Recreation Department should fully implement online recreation class registration and payments.

I. OVERALL NEW ORGANIZATIONAL STRUCTURE.

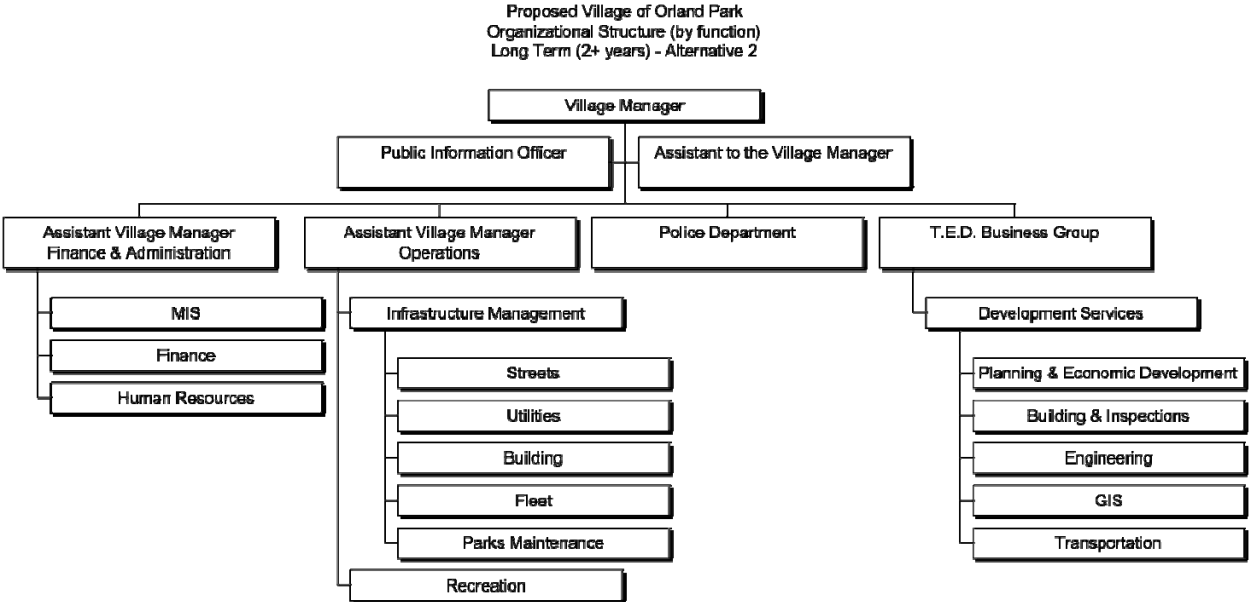
The following two charts summarize the short-term and long-term impact on the organizational structure if the Village were to implement all of the recommendations related to organizational changes outlined in this report. The first organizational chart shows the impact on the organizational structure after implementation of all organizational structure and staffing recommendations that were identified as “short term” (defined as occurring over the next eighteen to twenty-four months).



The following two charts represent two alternatives for implementing the long-term organizational structure that would be achieved from implementation of staffing and organizational structure changes identified as “long-term” (defined as those occurring more than two years from now). The following chart groups most Village services under one of the two Assistant Managers with one focused principally on the development, maintenance, and public works functions and the other with principally administrative functions (though Recreation has been included for workload / span of control balance).



The second alternative, represented in the chart below, groups services of the Village into one of three main business lines: Administration, Public Services, and Development and Transportation. This alternative has an advantage over the prior alternative due to the more manageable spans of control for the Manager over each function and a more focused line of business.



Either of these long-term structures will accomplish the key service issue noted early in the report, and addressed with specific recommendations in each departmental chapter, and will more closely align key business functions and services together.

APPENDIX A

SUMMARY OF EMPLOYEE SURVEY Village of Orland Park, Illinois

The Matrix Consulting Group conducted an employee survey of the Village of Orland Park to allow employees the opportunity to provide confidential input with regard to organizational and other issues within their departments and the Village. This survey was conducted as part of the Organizational Staffing Analysis of the Village of Orland Park. Employees were asked to respond to a series of questions that are posed as a series statements relating to the topics of departmental service level, staffing and operations. The table below shows the response distribution by department.

Department	No. of Respondents	% of Total Respondents
Village Manager (Including Human Resources)	13	8%
Civic Center	2	1%
Development Services	18	11%
Finance	12	7%
Parks	5	3%
Police	59	36%
Public Works	15	9%
Recreation	30	18%
Village Clerk	3	2%
Unknown	6	4%
Total	163	100%

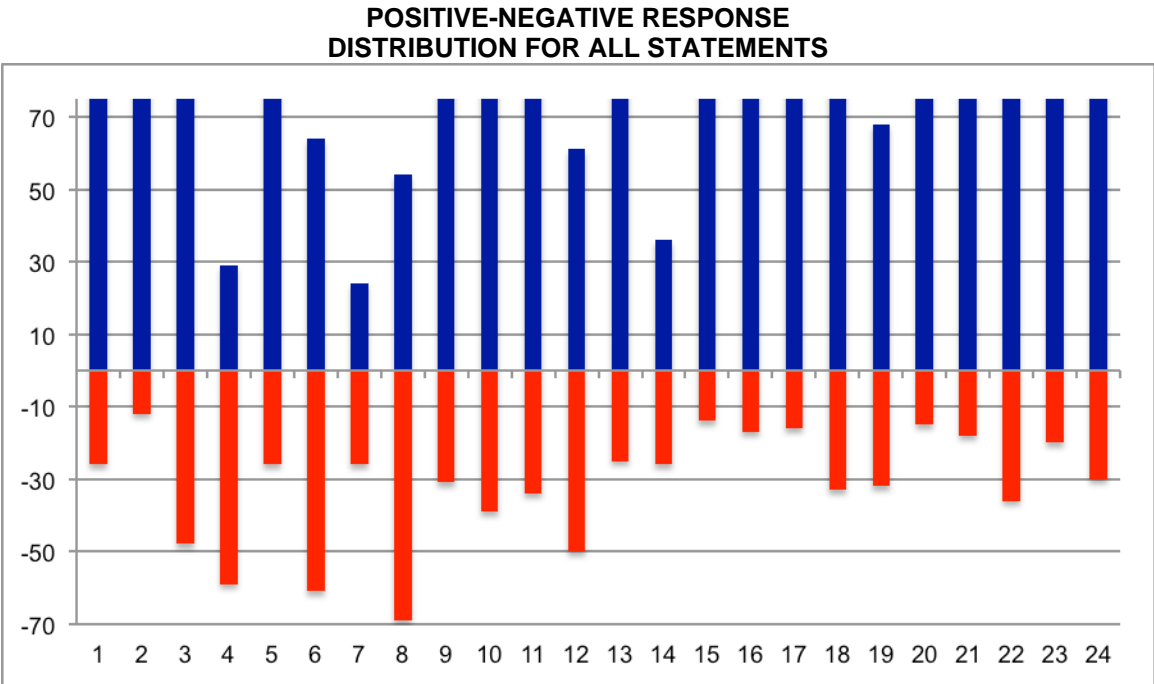
There were a total of 160 respondents. This represents a response rate of 54%. The Matrix Consulting Group also asked respondents to identify whether their position was fulltime, part-time or seasonal, as well as if the employee was a manager/supervisor and line staff. The table below presents the results.

Position	No. of Respondents	% of Total Respondents
Full-Time	133	82%
Part-Time	24	15%
Seasonal	3	2%
Unknown	3	2%
Total	163	100%

Position	No. of Respondents	% of Total Respondents
Manager/Supervisor	46	28%
Staff	112	69%
Unknown	5	3%
Total	163	100%

As shown in the table, the majority of respondents were fulltime employees of the Village.

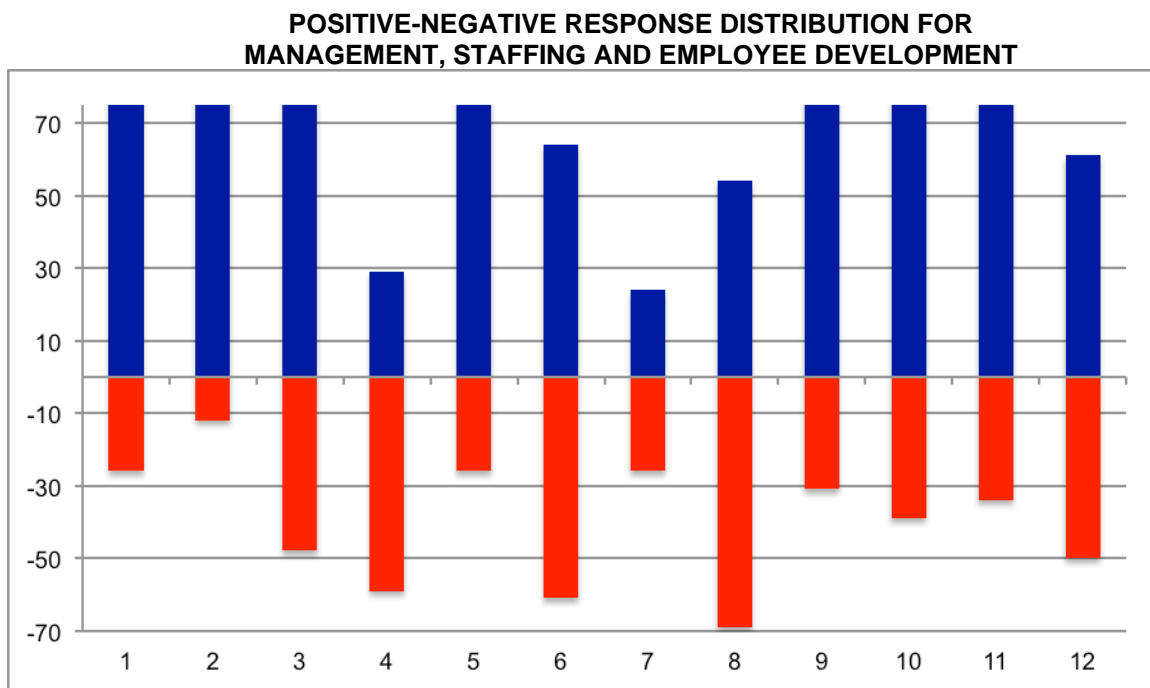
To gain a sense of the responses from the statements by general topic of the employee survey (e.g., management, processes, organizational structure, equipment and technology, workload, etc.), it is useful to look in greater detail at the topics that elicited the strongest positive and negative responses. The chart, found below, plots the number of responses that were positive and negative responses for each statement.



Overall, 73% of responses received were positive (i.e., either 'strongly agree' or 'agree'). The sections, which follow, present the survey results.

1. MANAGEMENT, STAFFING AND EMPLOYEE DEVELOPMENT

Respondents were asked to evaluate statements regarding management, staffing and employee development. Overall, 65% of responses were positive as shown in the chart below.

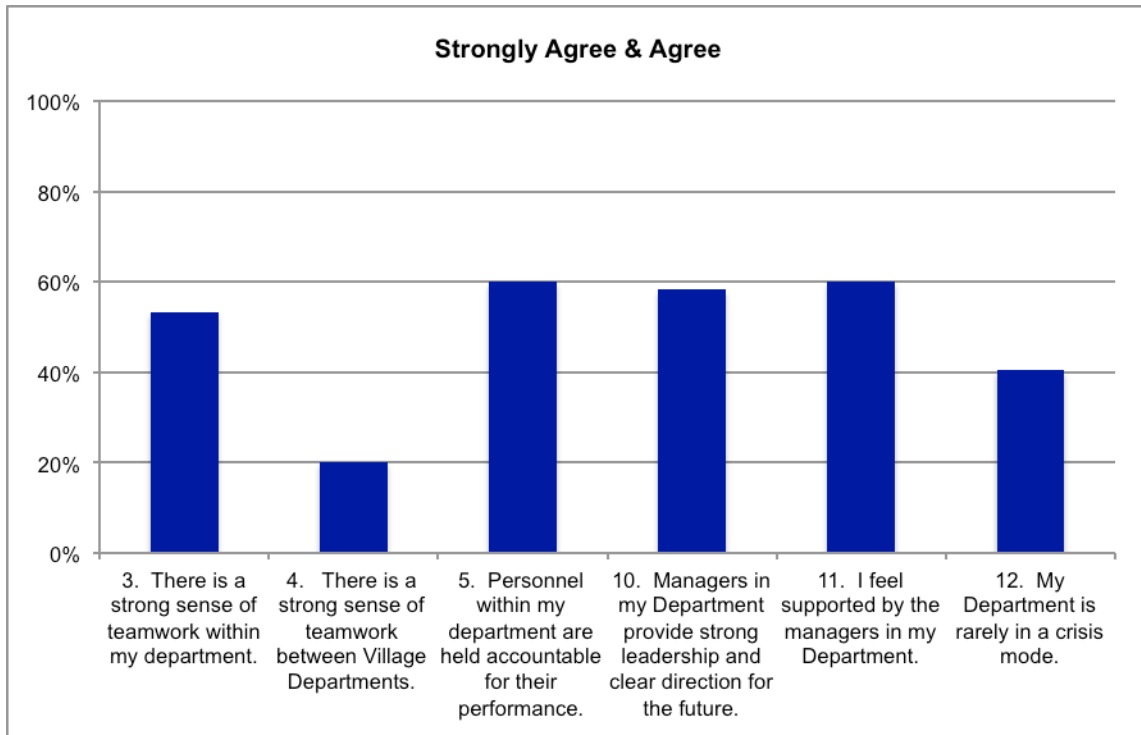


Overall, respondents maintained positive perceptions with respect to management, staffing and employee development. For the above statements, 65% of responses were positive (i.e., either 'strongly agree' or 'agree.'). Note that the above chart excludes 'no response' or 'don't know' responses.

(1) Management

Respondents evaluated statements relating to management within their Department. Overall, 63% of responses to statements regarding management were

positive. The chart that follows presents the percentage of respondents selecting 'strongly agree' or 'agree.'



The points, which follow, summarize the results.

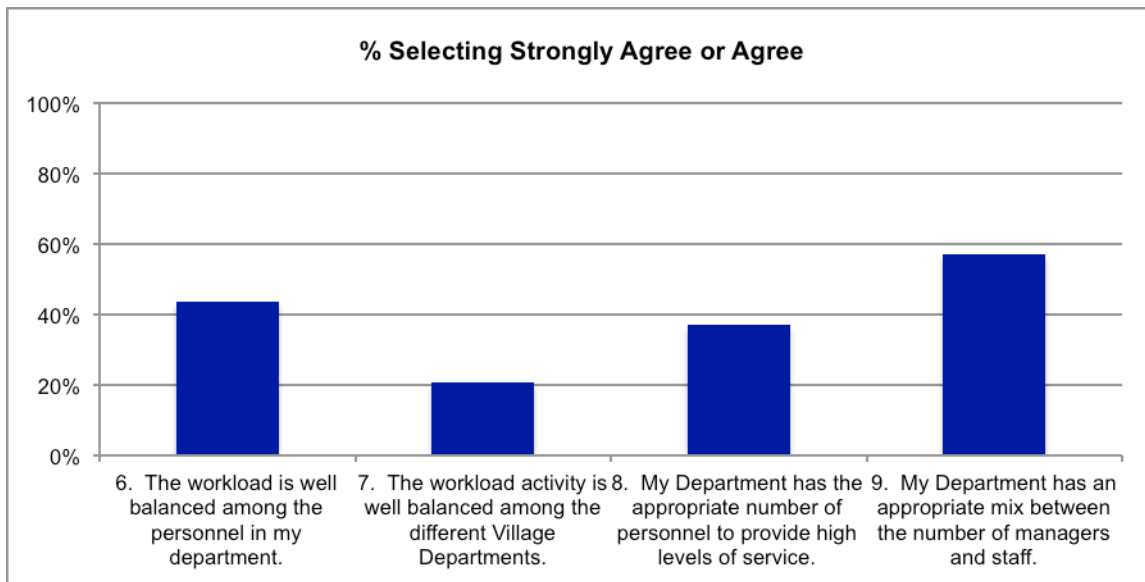
- In response to the statement, 'there is a strong sense of teamwork within my Department,' 53% of respondents selected 'strongly agree' or 'agree.'
- Significantly fewer respondents, 20% selected 'strongly agree' or 'agree,' when evaluating the statement 'there is a strong sense of teamwork between Village Departments,' and 41% selecting 'strongly disagree' or 'disagree.'
- With respect to the statement, 'personnel within my department are held accountable for their performance,' 60% of respondents selected 'strongly agree' or 'agree.'
- When provided the statement, 'managers in my Department provide strong leadership and clear direction for the future,' 58% of respondents selected 'strongly agree' or 'agree.'
- Similarly, 60% of respondents selected 'strongly agree' or 'agree' when provided the statement 'I feel supported by the managers in my Department.'

- Fewer respondents, 40% selected 'strongly agree' or 'agree' in response to the statement, 'my Department is rarely in crisis mode.'

While respondents had positive perceptions, respondents view some components less favorably (i.e., teamwork between departments and operating in crisis mode.)

(2) Staffing

Respondents evaluated statements relating to staffing within their Department. Overall, 55% of responses to statements relating to staffing were positive. The chart that follows presents the percentage of respondents selecting 'strongly agree' or 'agree.'



The points, which follow, provide a discussion of the results.

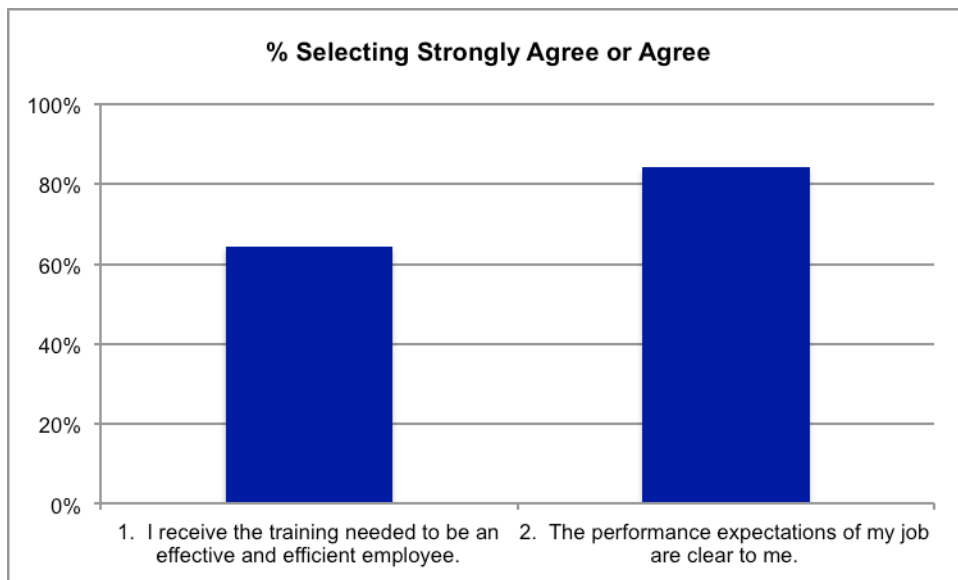
- With respect to the statement, 'the workload is well balanced among the personnel in my Department,' 44% of respondents selected 'strongly agree' or 'agree.'
- In response to the statement, 'the workload actively is well balanced among the different Village Departments,' 21% of respondents selected 'strongly agree' or 'agree.'

- When provided the statement, 'my Department has the appropriate number of personnel to provide high levels of service,' 37% of respondents selected 'strongly agree' or 'agree.'
- In response to the statement, 'my Department has the appropriate mix between the number of managers and staff,' 57% selected 'strongly agree' or 'agree.'

While the majority of responses were positive (55%), responses were slightly less positive when compared to all statements relating to management, staffing and employee development (65%) and the entire survey (73%).

(3) Employee Development

Respondents evaluated statements relating to employee development. Overall, 85% of responses to statements relating to staffing were positive. The chart that follows presents the percentage of respondents selecting 'strongly agree' or 'agree.'



The points, below, present a summary of the results for statements relating to employee development.

- In response to the statement, 'I receive the training needed to be an effective and efficient employee,' 64% of respondents selected 'strongly agree' or 'agree.'
- When provided the statement, 'the performance expectations of my job are clear to me,' 84% of respondents selected 'strongly agree' or 'agree.'

Respondents had positive perceptions with respect to employee development.

(4) Comments from Respondents Selecting 'Disagree' or 'Strongly Disagree'

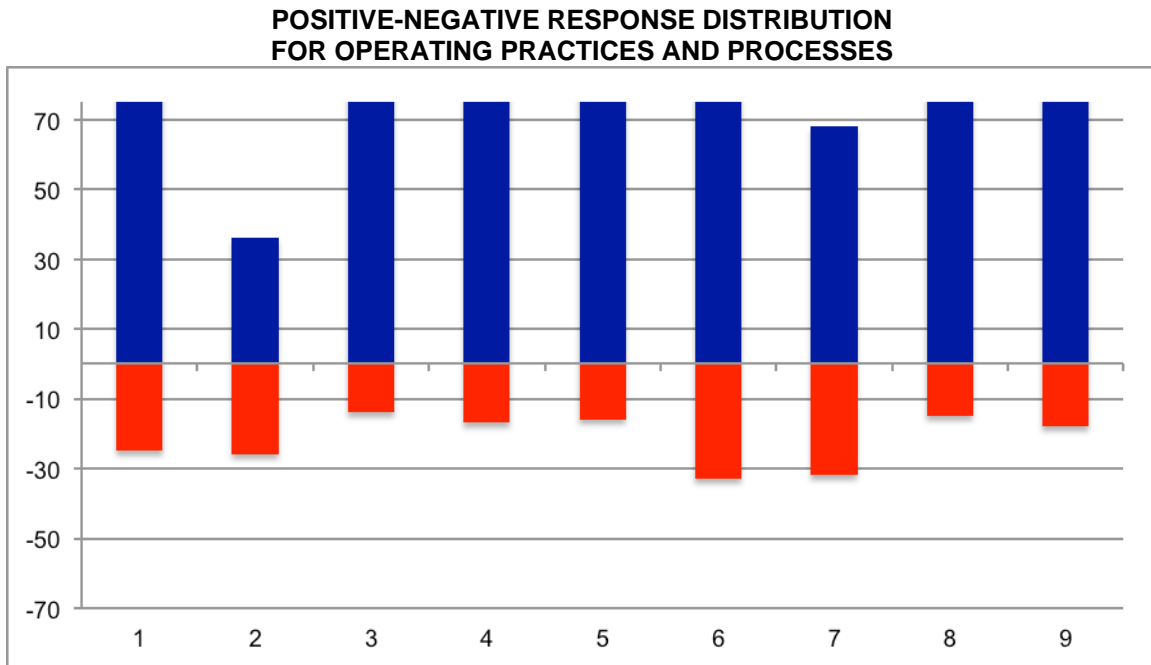
Respondents were provided an opportunity to provide a short description of why they selected 'disagree' or 'strongly disagree.' The points, below, highlight a number of the comments received by the Matrix Consulting Group.

- Prefer more scenario-based training needed for real life application.
- Perception of favoritism towards full-time employees/ biased against part-time employees that results in tension throughout the organization.
- Unequalled performance among staff (i.e., concentrated few carrying the weight for others).
- Differences in work ethic and performance targets and abilities of staff.
- Staffing or budgetary shortages impacting operations, such as in Police and Inspections.
- Inconsistent training of staff.
- Need better communication and sharing of information among Village departments, as well as a culture of teamwork.
- Workload is not disbursed evenly among personnel.

Respondents expressed greatest concern over training, distribution of work, and communications and cooperation among Village departments.

2. OPERATING PRACTICES AND PROCESSES

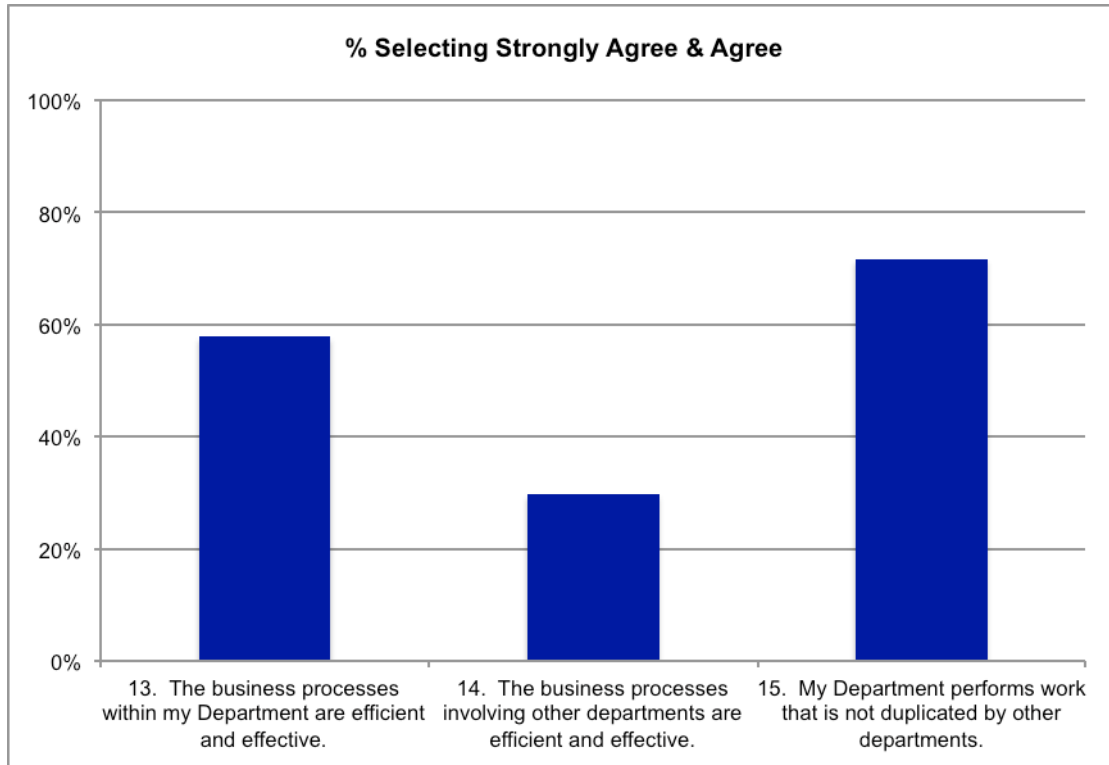
Respondents were asked to evaluate statements regarding operating practices and processes.



Overall, respondents maintained positive perceptions with respect to operating practices and processes. For the above statements, 80% of responses were positive (i.e., either ‘strongly agree’ or ‘agree.’). Note that the above chart excludes ‘no response’ or ‘don’t know’ responses.

(1) Operating Processes

Respondents evaluated statements relating to management within their Department. Overall, 77% of responses to statements regarding operating processes were positive. The chart that follows presents the percentage of respondents selecting ‘strongly agree’ or ‘agree.’



The points, which follow, present a discussion of the results.

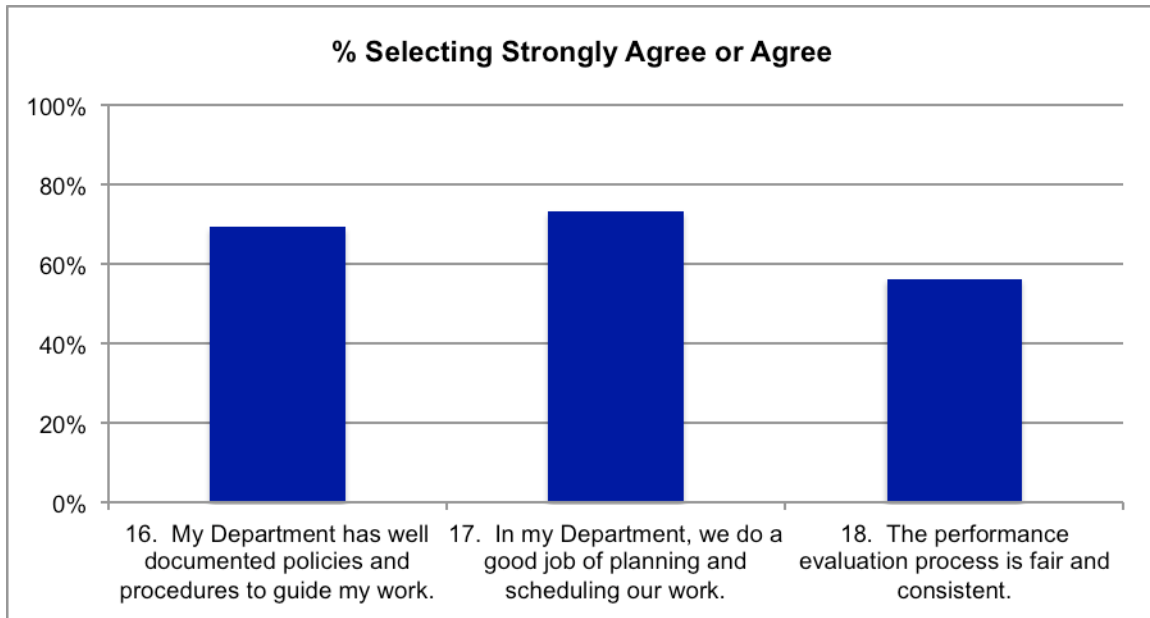
- In response to the statement, 'the business processes within my Department are efficient and effective,' 58% of respondents selected 'strongly agree' or 'agree.'
- When provided the statement, 'the business processes involving other departments are efficient and effective,' 30% of respondents selected 'strongly agree' or 'agree.'
- With respect to the statement, 72% of respondents selected 'strongly agree' or 'agree,' when evaluating the statement 'my department performs work that is not duplicated by other departments.'

While the majority (58%) of respondents felt processes in their department were efficient and effective, significantly fewer (30%) felt processes in other departments were efficient and effective.

(2) Operating Practices

Respondents evaluated statements relating to management within their Department. Overall, 81% of responses to statements regarding operating processes

were positive. The chart that follows presents the percentage of respondents selecting 'strongly agree' or 'agree.'



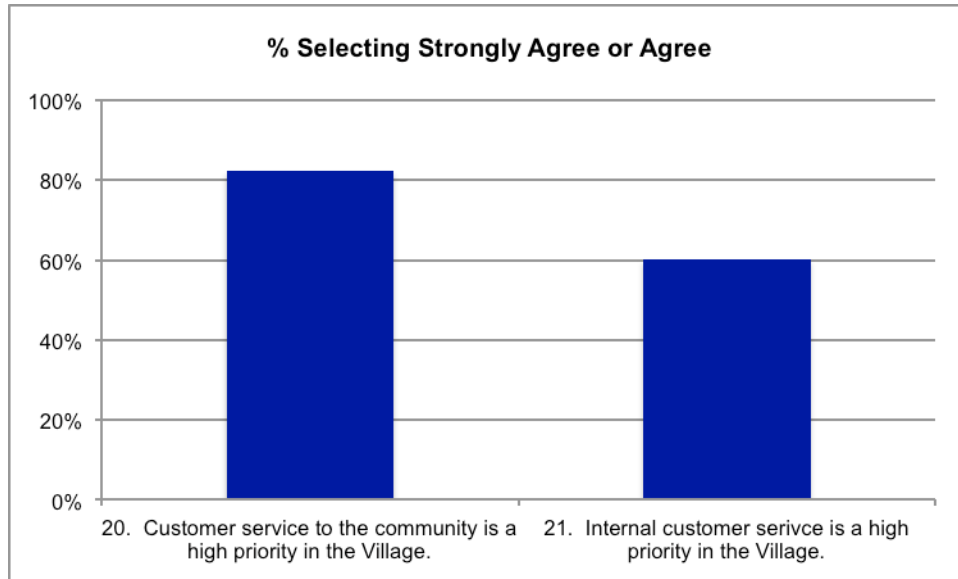
The points, which follow, present a summary of the results.

- With respect to the statement, 'my department has well documented policies and procedures to guide my work,' 69% of respondents selected 'strongly agree' or 'agree.'
- In response to the statement, 'in my Department, we do a good job of planning and scheduling our work,' 73% of respondents selected 'strongly agree' or 'agree.'
- When provided the statement, 'the performance evaluation process is fair and consistent,' 56% of respondents selected 'strongly agree' or 'agree.'

Overall, respondents maintained positive perceptions regarding operating practices.

(3) Customer Service

Respondents were provided two statements relating to customer service. Overall, 86% of responses were positive. The following chart presents a summary of the results.



In response to the statement, 'customer service to the community is a high priority in the Village,' 82% selected 'strongly agree' or 'agree.' Fewer respondents, 60%, selected 'strongly agree' or 'agree' with respect to the statement, 'internal customer service is a high priority in the Village.'

(4) Comments from Respondents Selecting 'Disagree' or 'Strongly Disagree'

Respondents were provided an opportunity to provide a short description of why they selected 'disagree' or 'strongly disagree.' The following points highlight a number of the comments received by the Matrix Consulting Group.

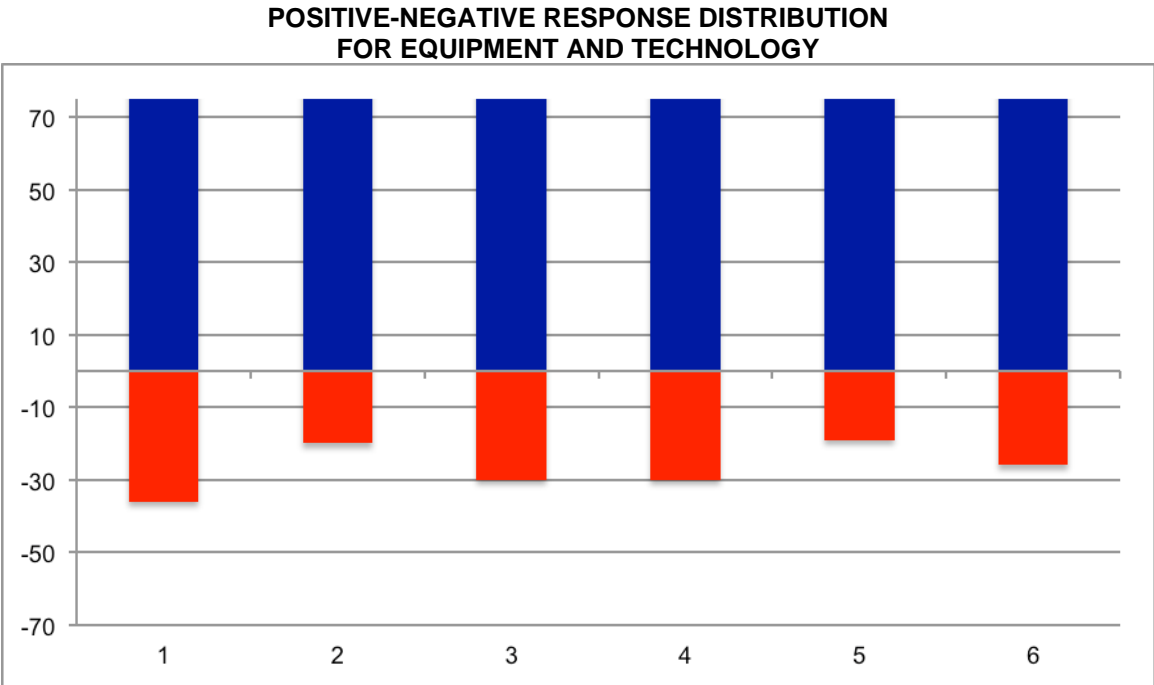
- Frequent changes to policies and procedures, which are not effectively communicated to staff. Further, sometimes policies and procedures are reactionary and do not seem to be well thought out.
- Diminished service to the community over the last few years.
- The performance evaluation system is ineffective – both in the way its administered and implemented (e.g., enforced).
- Inconsistent expectations of employees by managers and supervisors.
- There are a lot of unproductive meetings.
- Staff are not empowered to give good customer service.

- Lack of technology makes completing paperwork and communicating challenging.

Respondents expressed concerns regarding the performance evaluation process as well as customer service and communication.

3. EQUIPMENT AND TECHNOLOGY

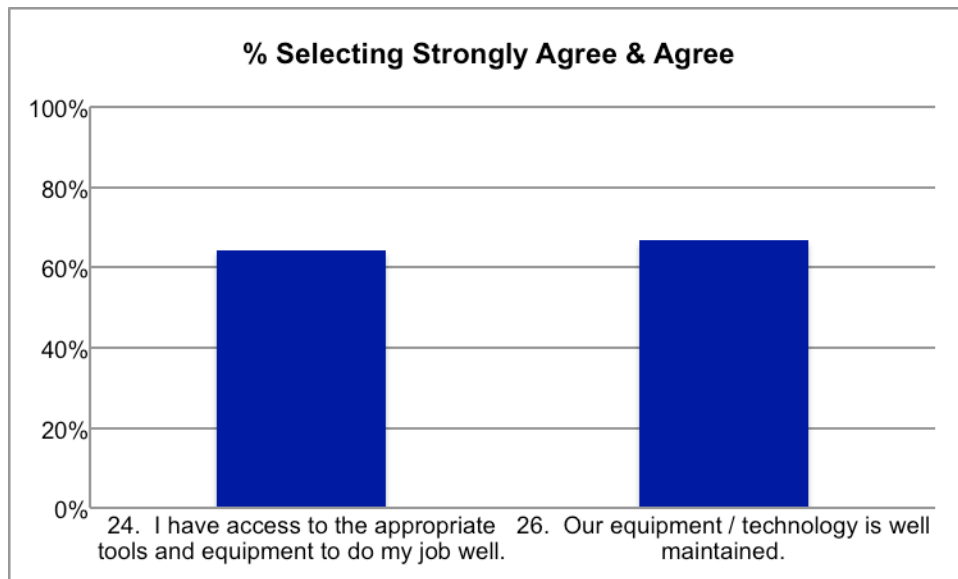
Respondents were asked to evaluate statements regarding equipment and technology.



Overall, respondents maintained positive perceptions with respect to equipment and technology. For the above statements, 77% of responses were positive (i.e., either ‘strongly agree’ or ‘agree.’). Note that the above chart excludes ‘no response’ or ‘don’t know’ responses.

(1) Equipment

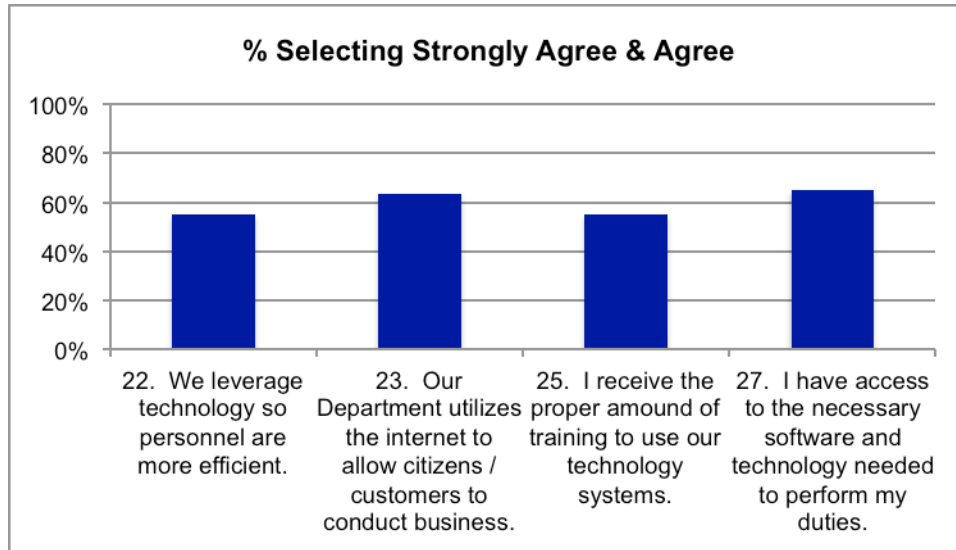
Respondents were asked to evaluate equipment and tools utilized to perform their job functions. The following chart presents the results.



Respondents had positive perceptions with respect to equipment. In response to the statement, 'I have access to the appropriate tools and equipment to do my job well,' 64% of respondents selected 'strongly agree' and 'agree.' Similarly, 67% of respondents selected 'strongly agree' or 'agree' when evaluating the statement: 'our equipment /technology is well maintained.'

(2) Technology

Respondents were provided several statements describing technology as it relates to their Department. The chart that follows summarizes the results.



The following points present a discussion of the results presented in the chart.

- When provided the statement, 'we leverage technology so personnel are more efficient,' 55% of respondents selected 'strongly agree' or 'agree' while 25% of respondents selected 'disagree' or 'strongly disagree.'
- In response to the statement, 'our Department utilizes the internet to allow citizens/customers to conduct business,' 64% of respondents selected 'strongly agree' or 'agree.'
- Fewer respondents, 55% selected 'strongly agree' or 'agree' in response to the statement, 'I receive the proper amount of training to use our technology systems.'
- With respect to the statement, 'I have access to the necessary software and technology needed to perform my duties,' 65% of respondents selected 'strongly agree' or 'agree.'

Overall, the majority of responses were positive with respect to equipment and training.

(3) Comments from Respondents Selecting ‘Disagree’ or ‘Strongly Disagree’

Respondents were provided an opportunity to provide a short description of why they selected ‘disagree’ or ‘strongly disagree.’ The following points highlight a number of the comments received by the Matrix Consulting Group.

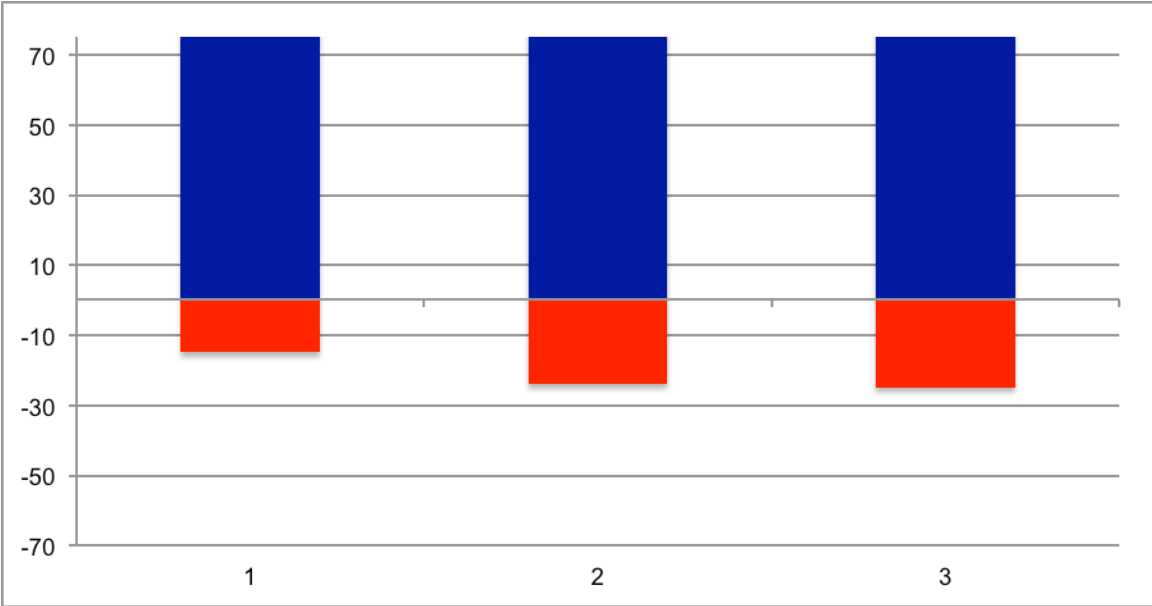
- Lack of access to the Internet for certain employees (mainly part-timers) impacts ability to provide service to customers at times.
- Need more training on software and technology.
- New Word is not user friendly.
- Customers should be able to make payments online, as well as use credit cards. Customers should be able to do this 24/7.
- Village websites are not user friendly. They are hard to navigate.
- Not enough in-depth training on systems, such as New World.
- Other than email, there is limited web-based interaction with customers.

Respondents’ comments focused on the lack of Internet, the need for greater, more in-depth training on technology and the need to improve the Village’s websites.

4. ORGANIZATIONAL STRUCTURE

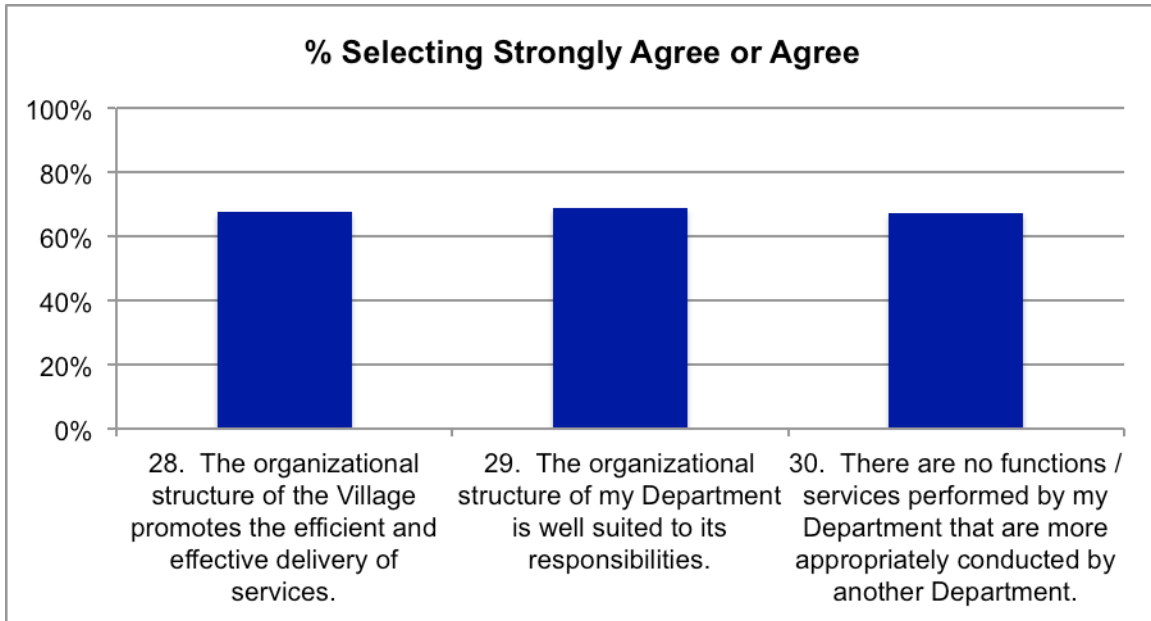
Respondents were provided a series of statements regarding organizational structure.

POSITIVE-NEGATIVE RESPONSE DISTRIBUTION
FOR ORGANIZATIONAL STRUCTURE



Overall, respondents maintained positive perceptions with respect to organizational structure. For the above statements, 82% of responses were positive (i.e., either ‘strongly agree’ or ‘agree.’). Note that the above chart excludes ‘no response’ or ‘don’t know’ responses.

Presented in the following chart are the percentages of respondents selecting ‘strongly agree’ or ‘agree’ for each statement relating to organizational structure.



The following points summarize the information provided in the chart.

- In response to the statement, 'the organizational structure of the Village promotes the efficient and effective delivery of services,' 68% of respondents selected 'strongly agree' or 'agree.'
- With respect to the statement, 'the organizational structure of my Department is well suited to its responsibilities,' 69% of respondents selected 'strongly agree' or 'agree.'
- When provided the statement, 'there are no functions/services performed by my Department that are more appropriately conducted by another Department,' 67% of respondents selected 'strongly agree' or 'agree.'

Respondents consistently evaluated statements regarding organizational structure in the Village positively.

Respondents were provided an opportunity to provide a short description of why they selected 'disagree' or 'strongly disagree.' The points, below, highlight a number of the comments received by the Matrix Consulting Group.

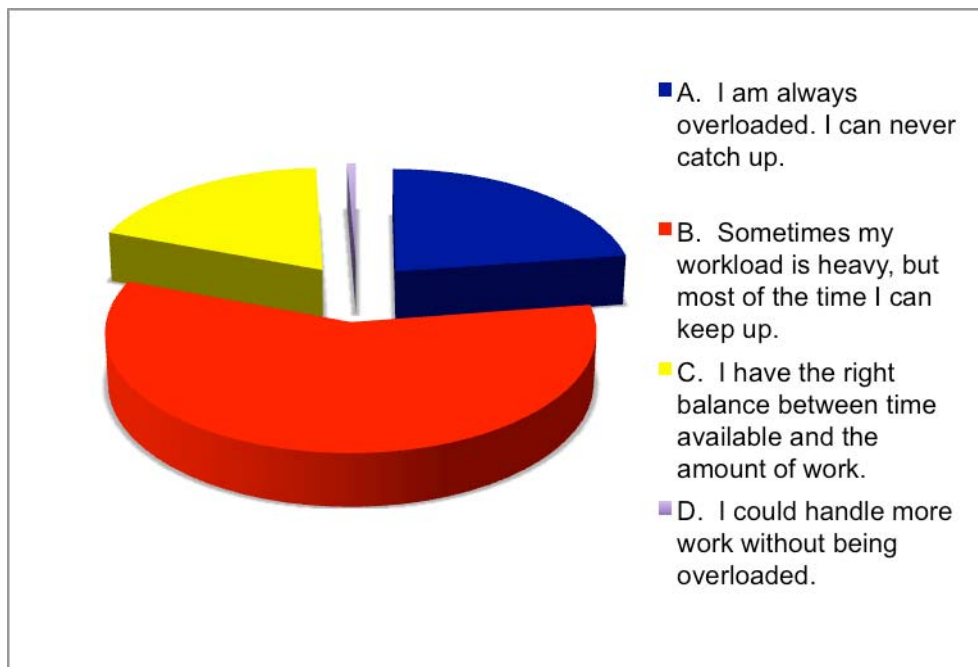
- Management is understaffed.
- Lack of marketing impacts our department.

- Responsibilities are not disbursed evenly.
- Some departments provide services for which they are not equipped, such as ground maintenance.
- Better teamwork among departments would improve operations – better communication too.
- Some departments/functions are micro-managed with managers and supervisors having to approve everything.

Similar comments surfaced in response to the organizational structure as elsewhere in survey responses. Specifically, comments focused on lack of teamwork and the uneven distribution of work. The most frequently identified areas for these comments related to maintenance functions handled by Parks and Building and Public Works.

5. WORKLOAD

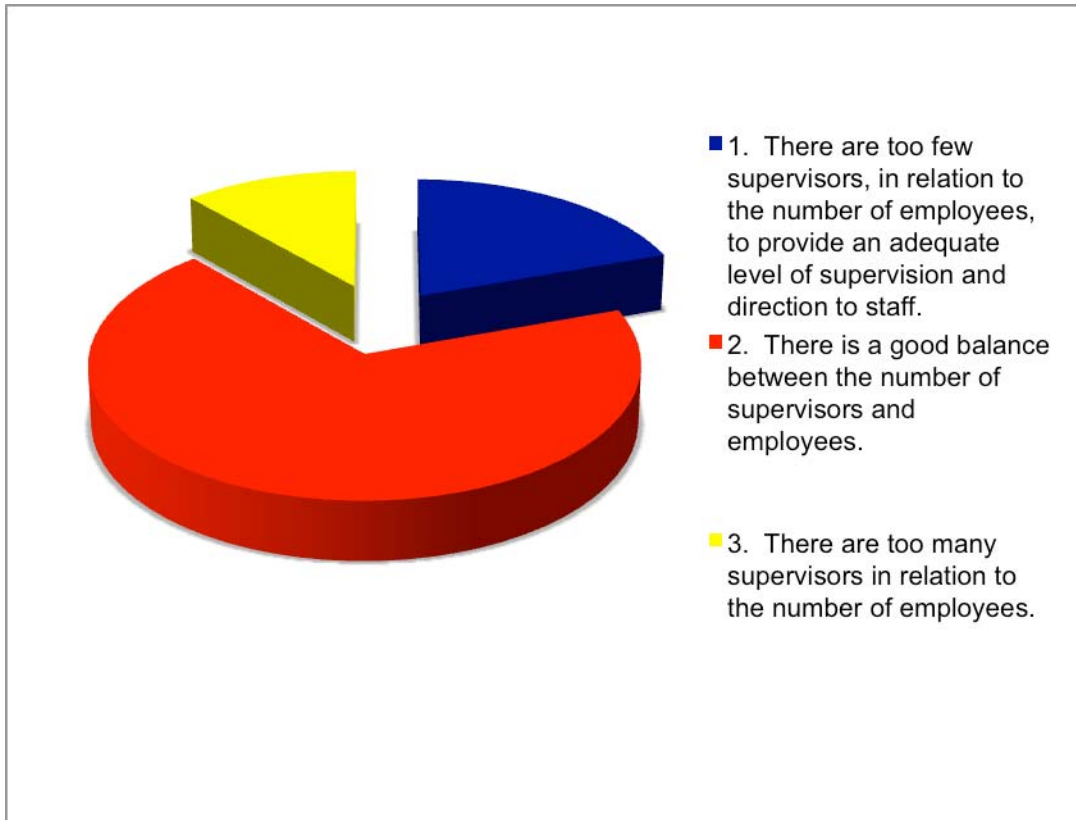
Employees were also asked to select one of four statements that best described their current workload. The chart, below, shows the responses. It should be noted that no responses selected 'I could easily handle more work given the time available,' while 58% selected 'sometimes my workload is heavy, but most of the time I can keep up.'



While 23% of respondents selected 'I am always overloaded. I can never catch up,' slightly fewer, 19% selected 'I have the right balance between time available and the amount of work.' Even fewer respondents, 1%, selected 'I could handle more work without being overload.'

6. SPAN OF CONTROL

Respondents were asked to evaluate statements regarding span of control within the Village. The chart, which follows, presents a summary of the results.



The majority of respondents, 69%, selected ‘there is a good balance between the number of supervisors and employees,’ while 20% selected ‘there are too few supervisors, in relation to the number of employees to provide an adequate level of supervision and direction to staff’ and 11% selected ‘there are too many supervisors in relation to the number of employees.’

7. ORGANIZATIONAL STRUCTURE AND EFFICIENCIES

Participants were asked to respond to a number of open-ended statements regarding organizational structure and efficiencies. The table, which follows, presents the open-ended questions and a sample of comments received.

<p>Are there opportunities for departmental reorganization (consolidation or separation) that you feel should be considered by the Village in order to provide a higher level of service or control / reduce the cost of service provision? If so, what areas should be reviewed or considered by the project team.</p>
<ul style="list-style-type: none">• If something is private, the Village should not get involved.

- Let Recreation take over Pace and cross-training the Recreation bus drivers and the pool of drivers.
- Let development services inspectors check the mowing performance done the contractor instead of having Streets do this.
- Provide incentives for performing multiple inspections and/or plan review tasks by single employees.
- Have one director over Parks and Recreation. This worked in the past.
- Office of Special Services could be consolidated with another Village department.
- Building and Health inspectors might be better suited with Public Works for improved communications and efficiency.
- There are responsibilities that overlap between Parks, Public Works and Recreation.
- Consolidate responsibilities for facilities and grounds maintenance.

Are there any operating efficiencies (either within your department or in other departments) or staffing changes that you feel the project team should consider during this study?

- Rapid Recovery program is too restrictive and excludes citizens that could benefit from it.
- Get Pace out of Public Works. Recreation should take it over.
- Streamline inspections – seems engineering, plumbing and landscaping issues are mixed up between departments.
- Office of Special Services and Civic Center could partner up to offer more creative programs and events.
- Facilities maintenance services should be combined.
- Consolidate grounds, stormwater and forestry maintenance.
- All special events should be consolidated under one department.

Are there any operating efficiencies (either within your department or in other departments) or staffing changes that you feel the project team should consider during this study?

- Better coordination of plowing of streets.
- Ways to enhance communication between departments and employees.
- Use part-timers to backfill temporary vacant civilian positions.
- To improve customer service, stop rotating clerical staff.
- Evaluate the appropriateness of staffing levels in departments.
- Improve the check cutting process in Finance.
- Implement a true HRIS System.
- Align Building Maintenance personnel work hours to Village hours.