



REPORT

FRANCONIA, NH **CLERICAL and ADMINISTRATIVE** **NEEDS and EFFICIENCY STUDY**

JANUARY 2016

Introduction

The Town of Franconia engaged the services of Municipal Resources, Inc. (MRI) to provide a general review of the clerical and administrative needs of the Town. This review became necessary, in part, due to the upcoming retirement of the long-time Administrative Assistant, anticipated to occur sometime during 2016. The purpose of the review will serve to identify potential opportunities for efficiencies, cross-training, and consolidation, as well as to provide job descriptions and some comparative wage data for the involved positions.

Overview and Approach

In December 2015, Carol Granfield, Senior MRI Consultant, met with and interviewed the individuals in the three administrative positions that operate and function at the town hall office. The positions reviewed are as follows: Administrative Assistant, Executive Secretary, and Secretary/Receptionist. Each of the position's duties have changed over the years and there has been some turnover in the Executive Secretary's position. As is typical with many small communities, each position includes a variety of tasks in order to meet the needs of the Town and many of the duties have been based on the skills of the individual occupying the position, rather than what the position actually requires.

Interviews were conducted by the consultant individually with each of the incumbents in the three positions reviewed. Relevant Town documents were reviewed and a Position Analysis Questionnaire (PAQ) was completed by each employee to further assist with position analysis, as well as job description development. A salary review of similar positions in comparably sized communities was conducted of the three positions in order to determine if current salaries are equitable.

An objective review has been conducted by the consultant who has over 38 years of experience in working as an Administrator, Manager, and Human Resources Director in small and large communities, three being in New Hampshire. The review and analysis has also included the expertise of additional MRI management consultants in order to provide a well-balanced review.

Administrative Assistant

This is a 40-hour full-time position, responsible to the Board of Selectmen, which coordinates the daily administrative functions of the Office of Selectmen and serves as a liaison between the Board and Town departments. The position fields complaints, suggestions, and keeps Selectmen apprised of progress on Town projects, personnel issues, and calendar requirements. It additionally coordinates and prepares the Town budget, annual report, purchasing, competitive bids, advertising, and currently processes payroll using QuickBooks software. Other areas of responsibility include maintaining the property tax lists, works with the appraisers to update tax maps, and works with auditors and financial information of the Town. The Town also uses the AVITAR system for billings, which seems to be working adequately for the Town.

The Administrative Assistant's position currently supervises two part-time positions in the office. This position is the equivalent of a Town Administrator level position; however, currently does not have the authority to supervise department heads. It is consistent with the responsibilities of either an Administrative Assistant or Town Administrator in towns with a similar population. A salary review of comparable Administrative Assistant positions reflects an average range of \$16 to \$21 per hour. The average range of comparable Town Administrator positions is \$19 to \$25 per hour. The incumbent's current salary is \$47,000 or \$22.60 per hour for a 40-hour work week.

Executive Secretary

This is a 20-hour part-time position that has continued to have duties increase as the incumbent becomes trained in all aspects of the job. The position is supervised by the Administrative Assistant. The duties of this position involve a variety of administrative and clerical duties designed to assist the Administrative Assistant and to facilitate the general operation of the Selectmen's Office. Responsibilities include accounts payable, payroll backup, water billing, and processing of deposits; handles the Welfare program; attends all Selectmen's meetings and takes notes and prepares the minutes; and serves as backup to the Administrative Assistant. Currently, the individual serving in this position works approximately 10 additional hours attending Planning Board and Zoning Board meetings, taking notes at the meetings, and preparing minutes; accepts applications for the Boards; and maintains the files. The average hourly rate of pay for similar positions in comparable communities is \$16-\$17 per

hour. The incumbent's current rate of pay is \$15.00 per hour for the Executive Secretary position and \$16.00 per hour paid for Planning Board work.

Secretary/Receptionist

This is a 20-hour part-time position that works afternoons in the Town office. The primary role of this position is performing a variety of clerical duties to assist with the general operations of the Selectmen's office. The position is supervised by the Administrative Assistant. Duties include answering the phone, picking up the mail, screening visitors to the Town Office, maintaining the office filing system, receiving monies due the Town, makes deposits to the bank, and types varied correspondence. The position also updates property record files and assessment cards. The average hourly rate of pay for similar positions in comparable communities is \$14.00 per hour. The incumbent's current rate of pay is \$16.46.

Resources, Training, Systems, and Equipment

The Town currently uses AVITAR assessing software and QuickBooks software for payroll and financial items. The AVITAR software system provides the Town with adequate services. While QuickBooks seems adequate, in discussion with the Executive Secretary, it was indicated that following completion of payroll additional time must be spent putting additional information into the computer of various time used such as overtime, training, and other options, noting this seemed to be unnecessary. The Town may want to consider exploring some other municipal-oriented software that could process, capture, and provide necessary reports and data for items to include payroll, benefits, and hours worked, as well as provide a variety of necessary human resource and financial applications that are necessary for towns. With the unfolding of the Affordable Care Act reporting, the benefits administration may begin to become much more time consuming in the future with reporting requirements.

Payroll is conducted on a weekly basis by the Administrative Assistant, with backup from the Executive Secretary. In order to provide more streamlined efficiency, movement towards processing payroll on a bi-weekly basis should be explored. Another option to explore is outsourcing payroll to an experienced service provider which is done by many small communities. This option provides timely assurance that payroll will be processed, and paychecks and direct deposit issued, regardless of the on-site staff's availability once time is submitted by the departments.

Cross-training between all three administrative positions has taken place to some extent; however, it has not covered all aspects of the Administrative Assistant and Executive Secretary positions. Additionally, the level of computer expertise necessary for both of these positions does not appear to be in place in the Secretary/Receptionist position; therefore, some cross-training has not occurred.

The current system in place for answering the phone is that the Secretary/Receptionist is supposed to answer the phones and then transfer to the appropriate person. During the interview with the Secretary/Receptionist it was indicated that many times the other personnel in the office will pick up the phone when they see who is calling (as there is caller-ID) and they know it is for them, rather than have the Secretary/Receptionist answer the phone. When the office is closed, or no one is available to pick up the phone, there is an automated recording and the caller can leave a message. While most communities like to have an actual person answer the phone, more and more have gone forth with having automated messages or direct dialing to the person rather than having a receptionist first answer the phone. This is something the Town should explore for efficiency, and possibly also look into a newer phone system, rather than just one telephone line. Voice Over Internet Protocol, or VOIP as it is referred to, is what many communities are moving towards and are finding it is also a cost savings. This option should additionally be explored.

With the possible consolidation and reorganization of some duties, the option of hiring a part-time recording secretary to attend Planning Board and Zoning Board meetings in order to take notes and prepare minutes should be considered. The average rate of pay is \$13.00 to \$15.00 per hour. The position could additionally serve as a backup for minute taking of the Board of Selectmen meetings. This would be a cost savings, plus provide additional time for the Executive Secretary's position to handle additional duties. The Executive Secretary would continue to accept and process Planning and Zoning applications and maintain all files.

Findings and Recommendations

The following discusses some recommendations the Town should consider for the future, not only as a result of the upcoming retirement of the Administrative Assistant, but also for improved efficiencies and cost-effective approaches, that will move the Town of Franconia forward.

1. Change the title of the Administrative Assistant's position to Town Administrator. This would typically attract higher qualified applicants for the position when it becomes available. If the Town does not change the title, the attached new job description for the Town Administrator would simply need the title changed to Administrative Assistant as the duties are the same. The duties described in the job description should continue; however, with changes proposed in the Executive Secretary's position, it should alleviate some of the workload and provide more time for thorough work, cross-training, and enhanced assistance to the Board of Selectmen. It would also allow time to work on necessary upcoming work required with the Affordable Care Act, and other compliance requirements, and perhaps focus more on the development of some items such as a classification plan and other personnel-related policies that will greatly assist the Town. The pay range for this position is \$19-\$25 per hour.

2. Combine the duties of the part-time Secretary/Receptionist and the part-time Executive Secretary into one position of Executive Secretary, and eliminate the Secretary/Receptionist position. The hours of the position would still be part-time; however, it would be 30 hours per week. The consolidation would provide a better utilization of expertise and resources for the Town. The position would continue to be involved with cross-training with the Town Administrator/Administrative Assistant position for backup during absence. The average pay rate for this position is \$16 per hour.
3. The Secretary/Receptionist's position should be eventually eliminated and replaced with the hiring of a Recording Secretary at a pay rate of \$13-\$15 per hour. This position would attend, take, and transcribe the minutes of the Planning Board and Zoning Board. If attendance would not be feasible, the meetings could be taped and then provided to the Recording Secretary for transcription. This change could be accomplished when the incumbent retires, if in the near future, or if determined to be in the best interest of the Town, the Secretary/Receptionist's position could be eliminated immediately and the individual could be considered for the Recording Secretary position if qualified. Changing this position to a Recording Secretary would greatly reduce the number of hours each week from the current 20 hours, to approximately 2 hours for meetings when held, and then transcription of the minutes.
4. Another option to consider is to eliminate the Secretary/Receptionist's position and consolidate the duties with the Executive Secretary's position, and also include the duties of taking minutes of the Planning Board and Zoning Board meetings, thus not creating a Recording Secretary's part-time position. However, this would require having the Executive Secretary's position as a full-time position, which would require providing some additional benefits.
5. The phone system in the Town office should be reviewed and determined if simply having an automated system with no receptionist is desirable, or if direct dial to the Administrative Assistant and Executive Secretary would suffice. A VOIP system should be explored with proposals received in order to determine if there would be a significant cost savings.
6. Other computer software systems should be explored and determined if they would provide more resources than the current QuickBooks system utilized. Many systems provide modules that can be added in the future, such as purchasing, human resources, and others. If a new system is added, additional modules could be added and budgeted for in a phased-in approach.

7. Consideration should be given to moving to a bi-weekly payroll instead of a weekly system. With a weekly system, payroll is continually being worked on, whereas a bi-weekly system provides time in-between to process reports and handle other work.

Conclusion

The Town of Franconia is served by a capable and dedicated clerical/administrative staff. The Town is not unlike other communities that are struggling to provide core services to the community as efficiently as possible. It is also a community that, like most others, dealt with growing demands by adding duties to trusted employees and creating positions as the need arose. The Board of Selectmen should be recognized for its effort to now take a look at what might be the best staffing scenario from a big picture perspective.

Three new job descriptions are attached to this report for positions of Town Administrator (or Administrative Assistant), Executive Secretary, and Recording Secretary. If the Town moves forth with the recommendations for the consolidation of positions, along with a new Recording Secretary, these new descriptions should be utilized. The average rates for the positions are provided as a resource which indicates some positions may warrant adjustments in wages. When individuals are replaced in these positions, a salary range should be listed. These changes will not only result in some cost savings of hours, but will also provide more efficiency, cross-training, and utilization of streamlined and enhanced resources.

The additional recommendations discussed pertaining to the exploring of computer software, telephone options, and the possibility of outsourcing of some services provides the Town with a roadmap to move forward. The review of the administrative/clerical positions at this time, provides the Town with several opportunities to consider.

Position Purpose:

Performs highly responsible senior level administrative and secretarial services for the Town Administrator and Board of Selectmen, maintains confidential departmental information, receives telephone calls and visitors, develops office procedures, maintains filing systems, prepares reports, prepares a variety of correspondence, sets up meetings, schedules and coordinates appointments, and gathers, duplicates, and distributes information as necessary. Performs all other related work as required.

Essential Functions:

(The essential functions or duties listed below are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related, or a logical assignment to the position.)

- Coordinates the daily administrative functions of the Office of Selectmen in the absence of the Administrative Assistant.
- Becomes familiar with essential software programs to include bookkeeping, payroll, and appraisal in order to assume responsibility for payroll, check writing, and appraisal concerns in the absence of the Administrative Assistant.
- Attends all Selectmen's meetings and public hearings, assists in the preparation of agendas, takes notes, and write the minutes of all meetings.
- Prepares minutes of the CIP and Safety Committee.
- Prepares outgoing correspondence for the Selectmen.
- Handles the Welfare program, including receiving and reviewing all applications for assistance.
- Assists in the preparation of the annual Town Report, including planning, assembling, and making arrangements for printing and distribution.
- Maintains up-to-date files of all properties under Current Use Assessment.
- Maintains office filing system. Files a variety of materials such as correspondence, reports, minutes, assessment cards, property deeds, and mortgages. Updates property record files, sales file, and address lists.
- Receives monies due the Town and makes deposit to the bank in a timely manner.
- Receives and reviews all permit applications, making sure that they are complete and correctly filled out prior to submission to the Board of Selectmen.
- Types correspondence, drafts of ordinances, reports, and memoranda as necessary.
- Works with the Water Department and takes care of the quarterly billing. Maintains accounts and does the warrant for billing.
- Processes deposits for the Transfer Station.
- Responsible for working with the computerized checking account; enters checks, deposits, and balance report.
- Performs similar or related work as required, directed, or as situation dictates.

Recommended Minimum Qualifications:**Education, Training and Experience:**

Associate's Degree Business, Office Administration, or related field; five years' experience in an office setting; or any equivalent combination of education and experience.

Knowledge, Ability and Skill:

Knowledge: Basic knowledge of the principles and practices of office management; and knowledge of municipal operations. Working knowledge of relevant local laws and regulations.

Ability: Ability to establish and maintain working relationships with the public, organizations, departments, and officials. Ability to communicate effectively. Ability to operate standard office equipment.

Skill: Excellent planning and organizational skills. Excellent written and verbal communication skills. Proficient computer skills; interpersonal and problem-solving skills. Skill in the use of Microsoft Office Word and Excel, and in report generation.

Physical Requirements:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Regularly required to walk, stand, sit, talk, and hear; operate objects, tools, or controls; pick up paper, files, and other common office objects. Ability to view computer screens and work with details for extended periods of time. May move objects weighing up to 10 pounds. Must be able to communicate.

Supervision:

Supervision Scope: Performs varied and responsible duties requiring a thorough working knowledge of departmental operations and the exercise of judgment and initiative to perform duties, complete assigned tasks, and analyze the facts or circumstances surrounding individual problems.

Supervision Received: Work is performed under the direction of the Administrative Assistant.

Supervision Given: None.

Job Environment:

- Most work is performed in office conditions; regular schedule requires attendance at evening meetings; additional time is required to prepare for meetings and other events.
- Operates a computer, telephone, and other standard office equipment.
- Performance of duties requires regular contact with town residents, town employees, and water department personnel.
- The employee has access to some confidential information.

- Errors in judgment and administration could have a continuing adverse effect on the Town's ability to deliver services and result in delays.

(This job description does not constitute an employment agreement between the employer and employee and is subject to change by the employer as the needs of the employer and requirements of the job change.)

Position Purpose:

Performs responsible services in a part-time capacity, ensuring that accurate minutes of meetings are taken and approved. Minutes for Planning and Zoning Boards are the primary responsibility, with backup for the Board of Selectmen meetings. Performs all other related work as required.

Essential Functions:

(The essential functions or duties listed below are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related, or a logical assignment to the position.)

- Attends Board and committee meetings as necessary.
- Travel to Town Hall to attend meetings, and deliver and pick up relevant material.
- Types draft minutes of the meetings from notes or tapes.
- Prepares unofficial minutes to include attachments from items distributed at the meeting.
- Prepares official minutes to include applicable attachments once approved.
- Posts unofficial and official minutes on the Town's website and other designated locales, or provides to the Administrative Assistant for posting.
- Performs other related clerical duties as directed by the Administrative Assistant or designee.
- Performs similar or related work as required, directed, or as situation dictates.

Recommended Minimum Qualifications:

Education, Training and Experience:

High School diploma or GED; two years secretarial or clerical experience; or any equivalent combination of education and experience. Possession of NH driver's license.

Knowledge, Ability and Skill:

Knowledge: Knowledge of Microsoft Office; operations of Town government; basic office operations and practices.

Ability: Ability to communicate effectively. Ability to operate standard office equipment. Ability to work independently. Ability to exercise patience and flexibility.

Skill: Excellent organizational skills. Excellent written and verbal communication skills. Proficient computer skills in the use of Microsoft Office. Skill in dealing with the public tactfully and effectively.

Physical Requirements:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Regularly required to walk, stand, sit, talk, and hear; operate objects, tools, or controls; pick up paper, files, and other common office objects. Ability to view computer screens and work with details for extended periods of time. May move objects weighing up to 10 pounds. Must be able to communicate.

Supervision:

Supervision Scope: Performs a variety of duties which are generally defined by precedent or established guidelines; specific questions are referred to the supervisor.

Supervision Received: Work is performed under the supervision of the Administrative Assistant.

Supervision Given: None.

Job Environment:

- Work is performed in office conditions; regular schedule requires attendance at evening meetings; additional time is required to prepare for meetings and transcribe minutes.
- Operates a computer, telephone, and other standard office equipment.
- Performance of duties requires regular contact with the general public and town employees and officials.
- Errors could result in delays or loss of service.

(This job description does not constitute an employment agreement between the employer and employee and is subject to change by the employer as the needs of the employer and requirements of the job change.)

Position Purpose:

Performs complex professional and management work in providing daily administration of Town operations. Acts as the Chief Administrative Officer for the Board of Selectmen and carries out the orders and policies of the Board of Selectmen in accordance with all laws and Town rules, regulations, ordinances, policies, and procedures. Performs all other related work as required.

Essential Functions:

(The essential functions or duties listed below are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related, or a logical assignment to the position.)

- Administers the daily operations of the Selectmen's office.
- Responsible for the processing of payroll and oversees accounts payable.
- Maintains personnel files and records. Attends to training needs of employees; motivates and coaches staff. Advises Selectmen on personnel matters and on all matters affecting Town employees and volunteers. Ensures uniform application of the personnel policies of the Town. Manages Town insurance and employee benefit programs. Assists staff with completing health insurance, life insurance, short-term disability, and retirement forms.
- Administers purchasing policies. Coordinates Town purchases, including reviewing purchase requisitions, drafting specifications, preparing bid documents, and evaluating competitive bids received.
- Fosters communication and serves as liaison between the Selectmen and Town department heads, other boards, committees, Town officials, and federal, state, and other governmental agencies.
- Reviews, investigates, and seeks to resolve complaints from the public, either through direct response or by delegating to the appropriate department head. Advises Board of Selectmen of these matters as necessary. Ensures that the Selectmen's Office is accessible to the public during normal hours of operation.
- Coordinates with Town Counsel the preparation of the town warrant for all town meetings, agreements, easements, and rights-of-way concerning land for Town use. Manages advertising and legal posting requirements for all departments and committees upon request. Develops timetable for Town programs and services.
- Attends all meetings of the Board of Selectmen and other meetings as required by the Board; responsible for setting the agenda and the accuracy of records of all Board of Selectmen meetings; represents the Selectmen whenever they are unavailable; and acts as their representative. Prepares press releases and reports. Handles Selectmen's correspondence. Makes appointments for Selectmen. Performs project administration.
- Coordinates the preparation of the annual Town budget for presentation to the Board of Selectmen. Responsible for its daily administration; analyzes expenditure trends; and reports potential problems to the Selectmen. Monitors department budgets to avoid over-expenditures. Completes and submits required budget forms and reports.
- Researches grants. Prepares grant applications and administers grants received. Assists the Selectmen with implementing audit recommendations.
- Maintains assessing information.
- Prepares all state reporting forms.
- Responsible for the preparation of the Annual Report and budget for Town Meeting.

- Performs similar or related work as required, directed, or as situation dictates.

Recommended Minimum Qualifications:

Education, Training, and Experience:

Bachelor's degree in Public Administration, Business Administration, or related field, plus two years' administrative and municipal management experience; or any equivalent combination of education and experience.

Knowledge, Ability, and Skill:

Knowledge: Extensive knowledge of local government operations, administration and management practices and procedures; knowledge of the application of state and federal laws and policies which affect local government, including purchasing; knowledge of fiscal management, and planning and human resource management.

Ability: Ability to plan, organize, and direct the preparation of reports, analyze problems, and formulate recommendations. Ability to speak and write effectively. Ability to establish and maintain effective working relationships with all Town employees, board/committee members, officials, and the general public. Ability to recognize Town-wide priorities and work cooperatively to support their accomplishment. Ability to exercise judgment and discretion in applying and interpreting the policies of the Board of Selectmen. Ability to prioritize multiple tasks and to maintain confidentiality and demonstrate ethics, integrity, and tact.

Skill: Proficient fiscal skills. Demonstrated skills in working cooperatively with other agencies, citizen groups, and individuals in promoting the best delivery of services to the community. Excellent managerial, organizational and communication skills. Proficient in utilizing contemporary office applications for word processing, database, spreadsheet, presentation, and internet use.

Physical Requirements:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Regularly required to walk, stand, sit, talk, and hear; operate objects, tools, or controls; pick up paper, files, and other common office objects. Ability to view computer screens and work with details for extended periods of time. May move objects weighing up to 10 pounds. Must be able to communicate.

Supervision:

Supervision Scope: Performs complex and highly responsible duties, requiring the exercise of a high level of independent judgment in providing professional advice to the Board of Selectmen and Town officials, departments, boards, and committees concerning the development, implementation, and administration of the policies, goals, regulations, and statutory requirements related to the administration and operation of the Town.

Supervision Received: Works under the policy direction of the Board of Selectmen with considerable latitude for independent judgment and initiative. Questions are referred to supervisor only when clarification of Town policy is needed.

Supervision Given: Coordinates activities of all Town department heads and supervises Town office clerical staff that is under the control of the Board of Selectmen. Assists and advises the Board with the personnel functions of hiring, evaluating, disciplining, promoting, and dismissing Town employees.

Job Environment:

- Most work is performed in office conditions; regular schedule requires attendance at evening meetings; additional time is required to prepare for meetings and other events.
- Operates a computer, telephone, and other standard office equipment.
- Performance of duties requires regular contact with Town residents, Town employees, state and federal officials, business and community organizations, consultants, and vendors.
- The employee has access to all Town-wide confidential information, including bid proposals, personnel records, agreements, and legal proceedings.
- Errors in judgment and administration could have a continuing adverse effect on the Town's ability to deliver services, and result in monetary loss and legal repercussions.

(This job description does not constitute an employment agreement between the employer and employee and is subject to change by the employer as the needs of the employer and requirements of the job change.)