

Town of Smithfield

Comprehensive Performance Assessment Services:
Department of Public Works and Department of Parks and
Recreation

Final Project Report



Submitted by:

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Executive Summary

One of the most important and often difficult decisions an organization can make is to examine its current operations, organization, and service delivery practices to identify challenges and opportunities. The Town of Smithfield embarked on this process of self-evaluation to better understand current challenges and effectiveness of its core service delivery and to better understand areas of opportunity that may exist which may yield the greatest positive impacts related to the Department of Public Works and the Parks and Recreation Department. Each element of the assessment was approached with the underlying premise: what is best for the Town? Discussions related to the priorities of the community and the current and future ability of the departments to respond to those priorities informed the assessment project's goals and objectives pertaining to service delivery efficiency and effectiveness as well as allocations of resources, financial and otherwise.

As a result of the comprehensive performance assessment process, this report is expected to help guide the Town in creating an actionable strategic framework that will allow for agile, responsive, efficient, and effective management of the departments involved into the future.

Acknowledgments

Berry Dunn McNeil & Parker, LLC (BerryDunn) would like to thank the leadership, staff, and stakeholders of the Town of Smithfield for collaboratively working to develop this performance assessment report. Special thanks to the individuals listed below; their time, commitment, and feedback were essential to the development of the final report.

- Randy Rossi, MBA, CGFM, ICMA-CM, Town Manager
- Gene Allen, Public Works Director/Water Commissioner
- Robert Caine, Parks and Recreation Director
- Kenneth Sousa, Budget and Financial Review Board Member
- Samantha Kerwin, Budget and Financial Review Board Member
- Department of Public Works Staff
- Department of Parks and Recreation Staff

BerryDunn would also like to thank the multiple stakeholders that made time to meet with our team and provide guidance and feedback related to a number of report elements. BerryDunn truly appreciates the level of cooperation, support, and feedback received from all.

Definitions and Terms

For purposes of clarity when discussing this project, BerryDunn will use the following terms and related definitions.

Table ES-1.0: Project Terms and Definitions

Term	Definition
ADA	Americans with Disabilities Act
BerryDunn	Berry Dunn McNeil & Parker, LLC
Best Practice	An approach to leadership, management, daily work tasks, or a fiscal environment that has been demonstrated to result in efficient and effective net gains for an individual or entity
BFRB	Budget and Financial Review Board
CDL	Commercial Driver's License
CIP	Capital Improvement Plan
DPW	Department of Public Works
GIS	Geographic Information System
HR	Human Resources
KPI	Key Performance Indicator
P&R	Department of Parks and Recreation
PCI	Pavement Condition Index
Performance Measure	A metric designed to provide insight into level of efficiency or effectiveness, output levels or outcomes, or workload or work quality
PMT	Project Management Team
PT	Part Time
RFI	Request for Information
RFP	Request for Proposal
RFQ	Request for Qualifications
ROW	Right-of-Way
RSR	Roadway Surface Score
SWSB	Smithfield Water Supply Board
SYC	Smithfield Youth Council
State	State of Rhode Island
Town	Town of Smithfield
TUAM	Trimble Unity Asset Management software

Project Background

The Town of Smithfield, Rhode Island, (Town) retained BerryDunn to assist with performance assessment services, beginning with the Department of Public Works (DPW) and the Parks and Recreation Department (P&R). This work will assess the departments' organizational structure and operation, funding and staffing levels, and performance reporting environment in order to develop recommendations for improved efficiency and effectiveness related to staffing, resource utilization, service delivery, mission, compliance, and performance and transparency reporting. The project consists of five phases.

Figure ES-1.0: Project Phases



Work Performed

BerryDunn commenced project initiation activities on September 30, 2022. Meetings with staff and other analysis activities started in October 2022 and continued through February 2023. Compilation of major findings and recommendations were completed March 2023 through September 2023. The following table summarizes key analysis activities completed as part of the project.

Table ES-2.0: Key Analysis Activities

Key Analysis Activities	
Activity	Description
Project Work Plan and Schedule	BerryDunn facilitated an initial planning call between BerryDunn’s team and the Town Project Management Team (PMT) to confirm project goals, objectives, and expectations. BerryDunn prepared an initial data request to gain a detailed understanding of DPW and P&R as organizations, how services are delivered, how they are organized fiscally, what their sources and uses of funding are, and how personnel resources are allocated.
Meetings With Department Leadership and Staff	In November 2022, BerryDunn conducted 21 fact-finding meetings with staff and leadership. During this process, BerryDunn met with 11 DPW and P&R staff members.
Meetings With Town Executive Management	BerryDunn met with the Town manager and director of finance on multiple occasions.
Meetings With the Budget and Financial Review Board (BFRB)	BerryDunn met with three members of the Town’s BFRB.
External Stakeholder Individual Meetings	BerryDunn met with one external stakeholder involved in the Town’s Charter Review Committee activities.
Organization Chart and Staff Roster File Review	BerryDunn reviewed the most current versions of the Town’s and DPW/P&R’s organization charts and staffing roster records.
Budget and Funding Analysis and Peer Comparisons	BerryDunn completed a department budget and funding review as well as a comparison and benchmarking analysis of peer cities/towns in support of the Town’s management review and analysis of DPW/P&R efforts and resource levels.
Best Practice Analysis and Research	BerryDunn reviewed available data to research and analyze industry best practices related to management and service delivery.

1.0 Initiative Format

This section describes the format and indicators used to present each initiative.

Each initiative in this report has been presented using a standard template. Table 1.1 provides a sample template.

Table 1.1: Sample Initiative Template

Initiative Name		
Initiative Summary		
	<i>Summary description for initiative and visual icon representing the initiative</i>	
Related Issue(s)		
	<ul style="list-style-type: none"> <i>Issue(s) the initiative seeks to address</i> 	
Action Items to Implement		
	<input checked="" type="checkbox"/> <i>Tasks suggested to implement the initiative.</i>	
Anticipated Benefits		
	<ul style="list-style-type: none"> <i>Benefits anticipated as a result of implementing the initiative</i> <i>Visual indicator communicating the anticipated benefits</i> 	
Risks		
No Action		
	<ul style="list-style-type: none"> <i>Risks of taking no action or not implementing the initiative</i> 	
During Implementation		
	<ul style="list-style-type: none"> <i>Barriers the Town should consider while implementing the initiative</i> 	
Implementation Timeline		
<u>Priority</u>	<ul style="list-style-type: none"> <i>Description of the implementation timeline, including any dependencies or connections to other initiatives</i> <i>Visual indicator communicating the initiative priority</i> <i>Visual indicator communicating the initiative complexity</i> 	<u>Complexity</u>
Best Practice Considerations		
	<i>Description of best practices related to the initiative and a visual indicator communicating the best practice or maturity of the initiative.</i>	

Figures 1.1 – 1.5 describe the different indicators used in the initiative descriptions.

Figure 1.1: Priority Indicators

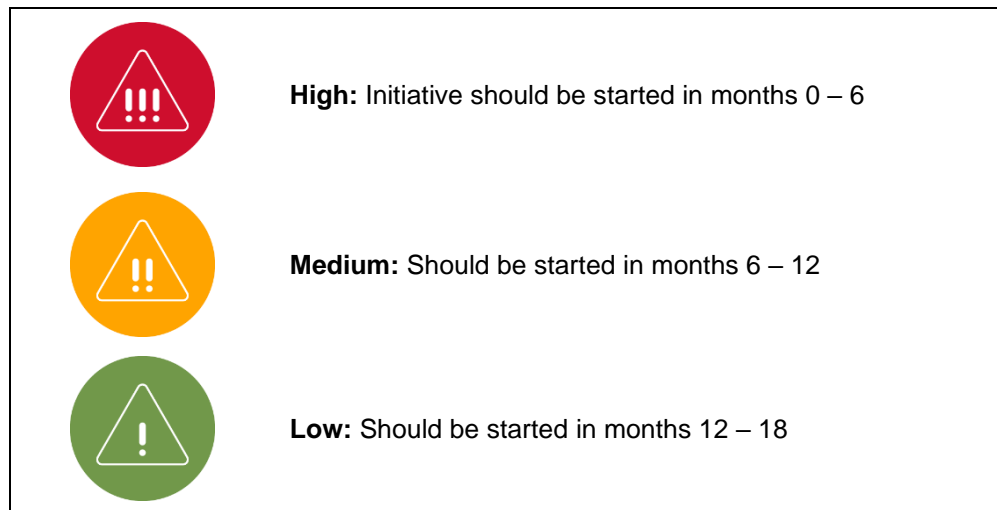


Figure 1.2: Relative Benefit Indicators

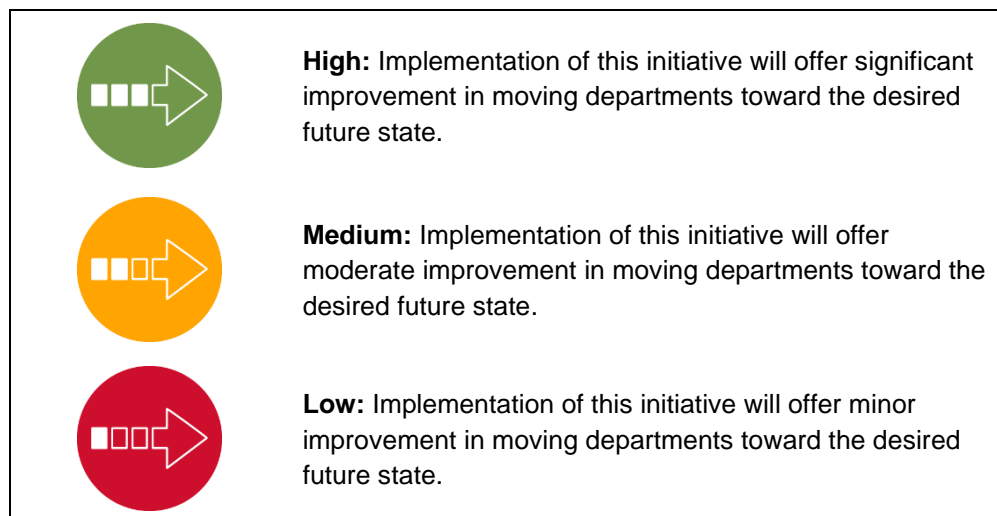


Figure 1.3: Implementation Complexity Indicators

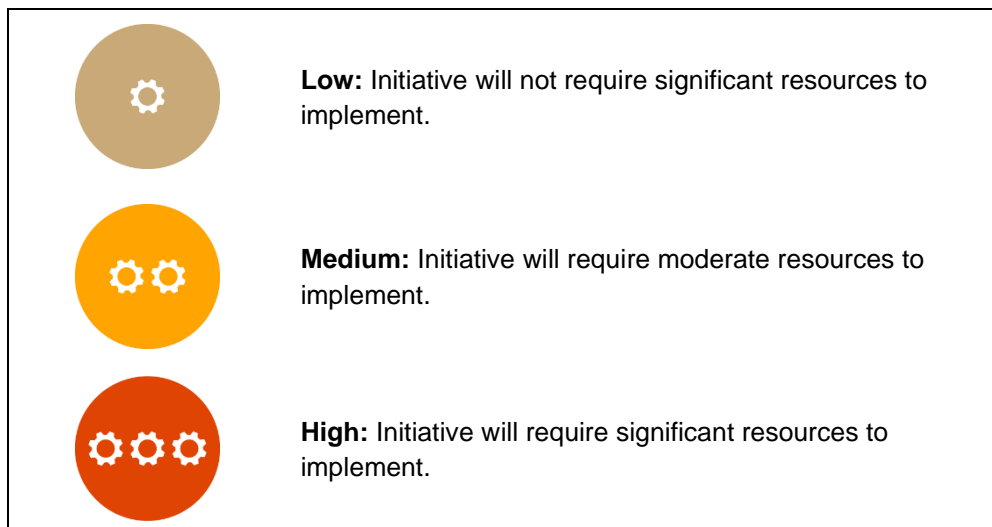


Figure 1.4: Best Practice Indicators

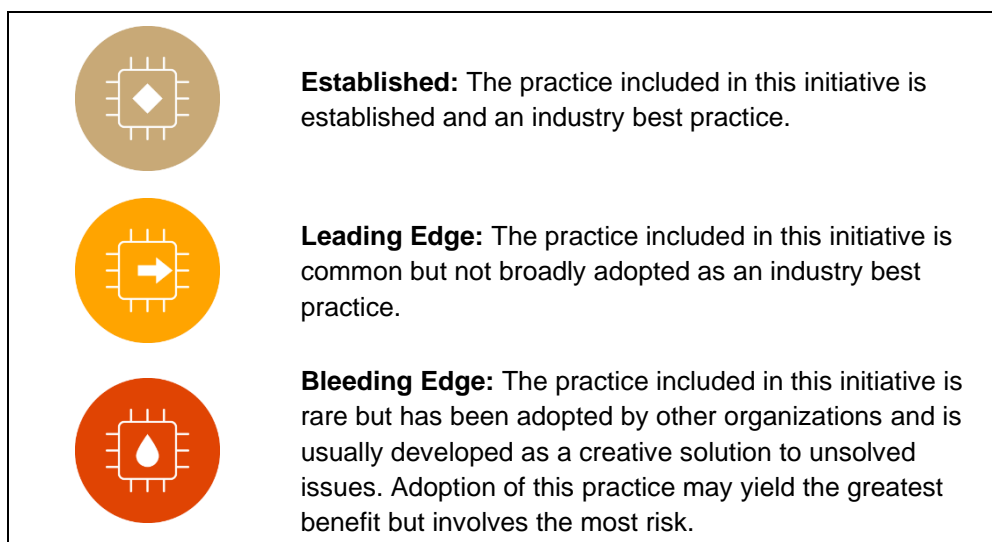
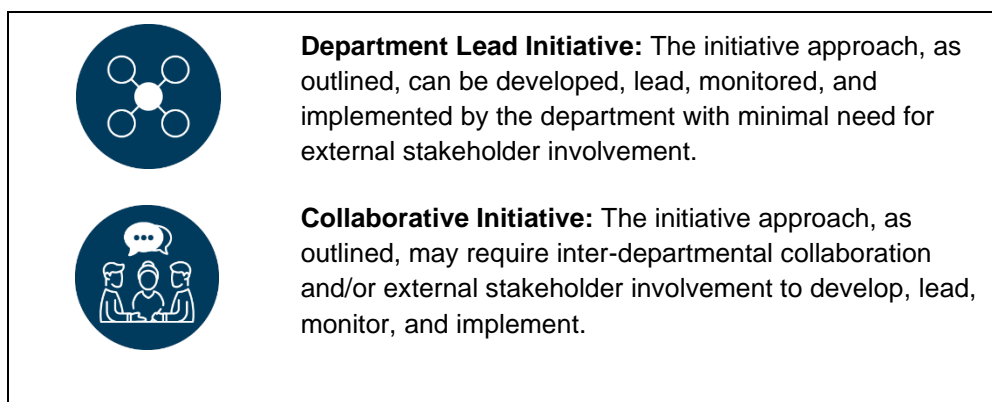


Figure 1.5: Table Indicators



2.0 Recommended Initiatives for DPW

This section includes detailed descriptions of each initiative, as well as industry trends and best practice considerations for DPW based on BerryDunn’s experience and research in developing the recommended initiatives contained in this report. This section also includes industry baseline and peer benchmarking data.

2.1 DPW Challenges, Opportunities, and Initiatives Identified

Based on information collected in Phases 1 and 2, BerryDunn developed a list of 21 challenges and opportunities. This list contains service delivery elements and practices BerryDunn identified as having the largest effect on overall performance of the DPW. BerryDunn and the PMT reviewed, created, and identified the eight highest priority initiatives based on projected benefit to the DPW, related to challenges and issues identified below. The initiatives and best practices included in Section 2.2 of this report were based on addressing these issues.

Table 2.1: DPW List of Challenges and Opportunities

Descriptions of Challenges and Opportunities	
No.	DPW Organizational and Management Environment
1	The DPW’s management is regularly called upon to find ways in which staff can be assigned to provide support for other Town department projects and/or needs, as well as townwide projects and initiatives.
2	The DPW’s recycling coordinator has limited availability and opportunity to audit collection routes consistently and systematically to help ensure compliance with acceptable solid waste and recycling items.
3	The DPW’s current phone system and related technology environment are outdated and inefficient. Since the time of leadership and staff interviews and the writing of this challenge/opportunity, substantial updates have been completed to DPW’s phone and applicable technology systems.
4	The DPW manually collects and compiles much of the data and information used to report on performance, progress, and outcomes.
No.	DPW Operations
5	The DPW currently has an aging workforce, with 75% of staff over 50 years of age and 50% over 60.
6	The DPW continues to experience challenges with recruiting qualified staff, which makes scheduling daily tasks challenging. Furthermore, due to recruitment challenges, opportunities to align new staff with more tenured staff for training and knowledge sharing impedes succession planning.

Descriptions of Challenges and Opportunities	
7	The DPW currently has a staff mechanic, however, leadership and staff expressed a desire to add an additional staff mechanic to increase the level of service and to assist with routine repairs and help ensure equipment and vehicles are properly maintained per recommended preventive maintenance schedules.
8	The DPW does not currently operate an electronic work order management system; therefore, daily workload and task types are not captured and cannot be reported on. This requires manual, paper-based scheduling of daily tasks.
9	DPW crews are often required to reorganize due to the last-minute scheduling of daily tasks. For this reason, routine maintenance is often overlooked to deal with “daily fires” or emergency assignments.
No.	DPW Physical Environment
10	The DPW’s current maintenance facility cannot accommodate adequate equipment/vehicle lifts, certain DPW vehicles, and certain fire apparatuses due to the current ceiling height being too low.
11	The DPW’s current maintenance facility needs significant roof repairs.
12	The DPW’s current maintenance facility does not have an adequate area for a staff break/lunchroom or locker room/changing area.
13	The DPW’s administrative offices are currently housed in a temporary office trailer.
14	The DPW could use additional area for composting and recycling operations due to the recent success of the program and increased number of residents utilizing composting and on-site recycling services.
15	The DPW is limited in its ability to expand administrative and maintenance facilities at the Spragueville Road location due to the site being adjacent to a wetland area.
No.	DPW Operating Budget and Management
16	The DPW does not currently utilize published performance measurements (though draft performance measures have been developed to date and internal tracking has commenced).
17	The DPW’s annual highway maintenance and associated infrastructure budget allocation is placed in its operating budget segment despite the majority of work funded with these funds are capital improvements in nature.
No.	DPW Capital Improvement Budget and Management
18	The DPW does not have dedicated professional engineering support in the form of an engineering personnel resource who reports to the director of public works and primarily supports public works operations and capital projects design, construction, and inspection.
19	The DPW does not have a dedicated geographic information system (GIS) resource (in-house or contract) to assist with asset and infrastructure information updates and GIS database management.


Descriptions of Challenges and Opportunities	
20	The DPW does not have maintenance requirements and schedules for capital assets within any system or work order environment (e.g., GIS systems and software).
21	The DPW’s operating budget is lacking line-item budget detail needed to more efficiently manage and allocate resources and to report progress made and level of service delivered.


2.2 Initiatives

BerryDunn identified eight initiatives for the DPW to consider based on challenges and opportunities identified above. Summaries for these initiatives were shared with the Town PMT for review and input related to applicability and prioritization, though the initiatives as currently listed are not necessarily in priority order. Tables 2.2.1 – 2.2.8 contain summary descriptions and a priority indicator for each initiative as well as full initiative detail.

2.2.1 Develop a Succession Plan for DPW

Table 2.2.1: Develop a Succession Plan for DPW

Develop a Succession Plan for DPW	
Initiative Summary	
	<p>The DPW should consider developing a coordinated approach—in conjunction with the Town’s executive management—to address current and future staffing needs. The need for succession planning is not unique to Smithfield. This issue is exacerbated by the lack of younger, qualified workers to fill open positions. This is especially true in the local government public works environment and for the Town’s DPW and Smithfield Water Supply Board (SWSB) operations. The need for succession planning has now become a primary issue for both DPW and SWSB, given that the majority of their workforce is nearing, or at, retirement age: 75% of staff are over 50 years of age, and 50% are over 60.</p>
Related Issue(s)	
<ul style="list-style-type: none"> As local governments attempt to operate and deliver services to residents as efficiently as possible, the result has often been the elimination of—or lack of funding for—additional, middle management and lead positions. The result being that many organizations find themselves in similar positions as the DPW and SWSB, with few alternative candidates to backfill positions when more senior staff retire. The need for succession planning is vital to both DPW and SWSB operations, as both workforces share staff of similar age and length of tenure. 	
Action Items to Implement	
<p><input checked="" type="checkbox"/> Task 1: Establish a working group of key department staff and Town executive management. The goal of this group would be to learn about and discuss successful succession planning practices or programs implemented in similar municipal agencies. Additionally, the group could lay out, in detail, the expected retirement patterns of DPW/SWSB staff over the next two to five years and prioritize recruitment types to fill positions as they become vacant.</p>	


Develop a Succession Plan for DPW		
<p><input checked="" type="checkbox"/> Task 2: Identify and encourage managers and lead workers to actively mentor and develop staff. Continuous staff development, mentoring, and training is vital to maintaining an efficient, effective, and healthy workforce. Recognizing and rewarding staff members who go above and beyond to mentor and train colleagues will support succession planning efforts significantly.</p> <p><input checked="" type="checkbox"/> Task 3: Reach out to employee bargaining units to discuss possible barriers to entry and solutions to breach barriers. Initiating conversations with employee bargaining unit(s) related to providing the necessary training to obtain specific licenses (e.g., commercial driver’s license [CDL] or a water operators’ license). Furthermore, by offering a grace or probationary period for new hires to complete bargaining unit-sponsored training programs will give new hires the opportunity to begin work immediately, with permanent employment tied to successfully completing a training program and obtaining proper licensure within six months of hire, for example.</p>		
Anticipated Benefits		
	<ul style="list-style-type: none"> • The DPW and SWSB will be better positioned to help ensure current service levels are maintained without interruption to residents, business owners, and stakeholders. • DPW and SWSB staff morale could increase as sufficient personnel resources are maintained, helping to prevent unduly burdening existing staff with increased and unmanageable workloads. • The DPW and SWSB can better maintain sufficient levels of properly trained staff to backfill unanticipated vacancies and assist with spikes in workloads resulting from unavailable personnel resources due to injury and/or retirement. • The DPW and SWSB can better respond to emergencies (e.g., a highway washout, water main break), limiting overall damage and interruptions to service. 	
Risks		
<p>No Action</p> <ul style="list-style-type: none"> • No action can adversely impact the ability to continue to deliver services at current levels and cause tension between the DPW/SWSB and the public. • No action can negatively impact staff morale and motivation, which will impact overall performance of the DWP/SWSB. • No action can adversely impact the DPW/SWSB’s ability to assume additional service responsibilities and/or respond to emergency situations. 		
<p>During Implementation</p> <ul style="list-style-type: none"> • The DPW/SWSB should continue to develop and support existing staff. Preparing existing staff for advancement should remain a top priority for management and leadership. 		
Implementation Timeline		
	<ul style="list-style-type: none"> • This initiative should be started immediately, with a target of convening a succession planning working group within six months. Once established, all other elements and tasks associated with this initiative should be ongoing. Succession planning needs 	



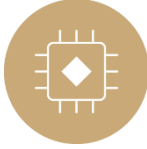
Develop a Succession Plan for DPW		
<p>Priority</p>	<p>should be considered and examined annually as part of the budget development process.</p> <ul style="list-style-type: none"> This initiative is not dependent on other initiatives; however, the ability for the DPW/SWSB to continue to deliver services at current levels and enhance service delivery in the future is vital to supporting other Town departments' operations and enhancing residents' quality of life. 	<p>Complexity</p>
Best Practice Considerations/Examples		
<p>Best Practice</p>	<p>The City of Watertown, Massachusetts, successfully implemented a succession planning training program for its DPW in partnership with its employee bargaining unit. The program allows the department to hire entry-level staff who do not have a current CDL for a probationary period of six months. During the six-month probationary period, staff must attend and successfully complete a CDL training program funded by the employee's bargaining unit through dues. Upon successful completion of the program, the employee will obtain a CDL and will be reclassified as a permanent employee.</p>	

2.2.2 Complete Upgrades DPW Phone System and Core Computer Applications

Table 2.2.2.: Upgrade DPW Phone System and Computer Applications


Upgrade DPW Phone System and Computer Applications	
Initiative Summary	
	<p>The DPW should continue to work with applicable Town departments—in conjunction with the Town's IT Department—to complete upgrades to address current phone system hardware and software deficiencies. Additionally, the DPW should also work with the IT Department to identify and update applicable core computer applications and software licenses (e.g., upgrade to the latest, necessary version of the Microsoft Office Suite, Adobe, etc.). Staff reported significant delays when trying to open core Microsoft applications such as Word, Excel, and PowerPoint due to outdated versions.</p> <p>Since the writing of this initiative phone system and computer application upgrades have been completed. Nonetheless, elements of this initiative should continuously be revisited to ensure the DPW has access to the most effective and efficient phone and computer systems to support daily service delivery to the community.</p>
Related Issue(s)	
<ul style="list-style-type: none"> DPW efforts to implement a performance management system will require up-to-date versions for core technology systems, including the phone system and core computer applications and software. DPW efforts to increase staff efficiency, enhance the quality and level of service delivered, and provide more effective customer service will be better realized when staff has access to up-to-date systems and technology to support their day-to-day tasks. 	

Upgrade DPW Phone System and Computer Applications	
<ul style="list-style-type: none"> DPW upgrades to core technology systems may allow for more efficient and effective use with other DPW/SWSB technology systems. (i.e., Beta Pavement Management System, Government Solutions utility billing system, and Trimble Unity Asset Management [TUAM] software). 	
Action Items to Implement	
<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Task 1: Continue communications with the IT Department. The IT Department supplies the Town’s technology needs. Therefore, DPW should continue to reach out and support, where needed, IT’s efforts to address current phone system deficiencies and update/upgrade core computer applications. It may help to prioritize broad objectives related to which hardware/software should be addressed first/next, strategies for completing upgrades/updates, and identify any resources necessary to help ensure completion of upgrades/updates. <input checked="" type="checkbox"/> Task 2: Identify a DPW staff member to lead and oversee upgrades and implementation through completion. A staff member who has knowledge of and experience with phone system hardware and software—as well as general computer office applications—should be identified to coordinate efforts with the IT Department. This person should meet regularly with IT staff to focus on accomplishments, progress, and next steps until all upgrades/updates are complete. <input checked="" type="checkbox"/> Task 3: Develop evaluation criteria to determine which devices should be prioritized for current and future upgrades/updates. The action plan should include a process to evaluate existing phone system features and devices and prioritize specific hardware and/or software types for upgrades. Furthermore, the plan should prioritize office and computer hardware and software upgrades. Prioritization should be centered on which devices and technologies are most utilized for daily service delivery needs and are critical to DPW operations and service delivery. 	
Anticipated Benefits	
	<ul style="list-style-type: none"> The DPW will benefit from access to up-to-date phone and technology systems. This can save time for staff and create efficiencies when completing daily tasks and assignments. This time can be reallocated to other DPW initiatives. The DPW will benefit from utilization of up-to-date phone and technology systems, which can improve customer service efficiency and effectiveness and strengthen relationships with key stakeholder groups, the business community, and residents.
Risks	
<p>No Action</p> <ul style="list-style-type: none"> No action can adversely impact the DPW’s customer service effectiveness and cause tension between the DPW and the public. No action can negatively impact staff morale and motivation from not having access to sufficient technological resources needed to complete daily tasks, which will impact overall performance of the DPW and service delivery quality. No action may adversely impact the DPW’s current efforts to efficiently, consistently, and accurately collect and analyze data generated from operations and service delivery to be utilized in performance measure/key performance indicator (KPI) reporting. 	

Upgrade DPW Phone System and Computer Applications		
<p>During Implementation</p> <ul style="list-style-type: none"> Upgrades to existing phone system elements and technology systems may become complex and time-consuming. It is important to prioritize upgrades and hardware and software types and keep the initiative moving forward as upgrades/updates are occurring. Having a plan to support business continuity while certain technological systems might be unavailable will help ensure staff can complete their routine and daily assignments as needed. 		
Implementation Timeline		
<p>Priority</p> 	<ul style="list-style-type: none"> This initiative should continue to be supported, with a target of completing all core upgrades within six months, on a rolling basis. This initiative is not dependent on other initiatives; however, the phone system and core computer application updates will help support the fulfillment of other DPW initiatives indirectly. 	<p>Complexity</p> 
Best Practice Considerations/Examples		
	<p>The development of strategic phone and technology system plans (scheduling and identifying resources needed to fund future upgrades/updates)—in conjunction with IT departments—is a common practice in similar local agencies across the country. Steps taken to automate processes or increase service delivery and customer service efficiency and effectiveness are core components of a well-performing organization and need to be supported by sufficient, core technological systems and tools.</p>	

2.2.3 Complete Implementation of Trimble Unity Asset Management (TUAM) Software

Table 2.2.3: Complete Implementation of TUAM Software

Complete Implementation of TUAM Software	
Initiative Summary	
	<p>The DPW has commenced with preliminary work related to implementing TUAM software to support asset management needs and provide the core foundation of operating an effective work order management system. To date, the DPW has effectively maintained asset data and information utilizing related systems, such as the Beta Pavement Management System. Nonetheless, additional work is still needed to fully implement TUAM to be a technological solution to satisfy work order development, management, and reporting. The DPW should continue bringing TUAM software online in its entirety. The DPW should also continue to identify future business and software needs to help ensure current systems can be maintained to meet future needs.</p>
Related Issue(s)	
<ul style="list-style-type: none"> The DPW cannot efficiently, consistently, or accurately track core operational metrics—such as labor hours, equipment, asset inventory, material use, or material costs—without a sufficient electronic work order system. Manually creating paper-based work orders is time-consuming, 	




Complete Implementation of TUAM Software

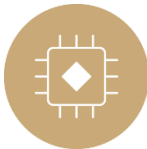
inconsistent, and inefficient; it does not produce reliable data that could be used to assess operational performance, efficiency, or effectiveness.

- DPW staff reported core operational metrics related to labor, equipment, and material costs are not consistently tracked for Town assets. This negatively impacts the DPW's ability to reference, analyze, and assess core operational data when developing operational budgets and forecasts to justify future resource allocation needs.
- The DPW will not be able to efficiently and consistently develop and utilize performance measurements/KPIs to support resource requests or provide a transparent look into DPW operations.

Action Items to Implement


- ☑ **Task 1: Continue with the implementation of TUAM software.** Continue to support current efforts to fully implement TUAM software, requesting support when needed. In doing so, the DPW will be positioned to develop and operate a sufficient work order system capable of supporting DPW service delivery and data-gathering needs.
- ☑ **Task 2: Develop templates to create a standard, consistent format for all work order types.** Work order templates should reflect the high-volume types of work the DPW consistently completes (e.g., preventive maintenance, scheduled maintenance, emergency repairs, etc.). Templates should be easily accessible for DPW staff within the TUAM system. At a minimum, templates should contain basic information, such as the date of work performed or to be performed, staff assigned, potential materials and supplies needed, and estimated time of completion. The templates should also have comment/note fields and corresponding fields for responses to the comments/notes, as needed. Templates should also include a sensible, auto-generated numbering system (if possible).
- ☑ **Task 3: Identify a DPW division to pilot the new system and begin to utilize consistently.** Train key supervisory staff to utilize TUAM software to develop and process work orders related to the construction, maintenance, and repair of Town assets and infrastructure. Staff should capture key resource inputs, such as labor, equipment, material types and amounts, and total cost for work completed. Eventually, each work order could be linked to assets mapped in the DPW/Town's GIS database.
- ☑ **Task 4: Begin to phase out any remaining paper-based processes related to work orders and data capture.** Once staff are sufficiently trained on TUAM software (confidently and consistently generating work orders and entering work order data) all associated paper-based processes should be eliminated.
- ☑ **Task 5: Monitor feedback and analyze information for three months.** For the first three months after the work order system goes live, plan to meet at the end of each month to discuss staff experiences. Evaluate initial system effectiveness, discuss challenges, and adjust process and system parameters as needed. Document all changes implemented and lessons learned.
- ☑ **Task 6: At the end of the third month, plan for the next DPW division to start utilizing the system and repeat Tasks 2 – 5.** After the initial DPW division has successfully begun utilizing the work order system, identify the next division to train and use the system.

Complete Implementation of TUAM Software		
Anticipated Benefits		
	<ul style="list-style-type: none"> • The DPW will benefit from operating an efficient and effective work order system that can serve as one of the primary elements supporting department operations and service delivery. Work order systems not only support service delivery quality and effectiveness, but also provide more transparent opportunities to view and access DPW service delivery data information consistently. • The DPW will benefit from streamlining daily task scheduling as well as being able to track and analyze work order and workload data. Capturing and tracking this data will help the DPW assess current staffing levels and funding allocations in relation to levels of service being provided and demanded. • The DPW will benefit from the ability to track labor, equipment, and material costs to inform decision-making for resource allocation, inform budget development, and support funding requests. • The DPW could interface the fleet management system with the work order system. Fleet maintenance services staff could use the future system to receive and process vehicle information, such as vehicle data, vehicle maintenance, fuel data, equipment, equipment maintenance, and preventive maintenance. 	
Risks		
<p>No Action</p> <ul style="list-style-type: none"> • No action can adversely impact the DPW’s ability to articulate utilization of funding and resources, potentially limiting its ability to advocate for and justify requests for additional funding or resources. • No action can limit capturing and tracking core operational data that could assist the DPW with assessing current staffing levels in relation to levels of service being provided and demanded. • No action could severely limit the DPW’s ability to produce accurate, consistent data and information for performance measure/KPI development and supply accurate, sufficient data and information to be reviewed during the budget development process. 		
<p>During Implementation</p> <ul style="list-style-type: none"> • The DPW should communicate to staff the importance of work order development and use and clarify the connection between work orders; service delivery efficiency; the identification, prioritization, and scheduling of work and tasks; and performance measure/KPI development. 		
Implementation Timeline		
<p>Priority</p> 	<ul style="list-style-type: none"> • Though this initiative has commenced, all aspects should be continuously supported through completion without interruption, with a target range of having relevant TUAM modules fully implemented within six months. 	<p>Complexity</p> 

Complete Implementation of TUAM Software	
Best Practice Considerations/Examples	
	<p>The City of Denton, Texas, recently completed a working list of goals and objectives related to its asset management system needs. In doing so, the City is working to address several challenges and deficiencies in the current asset management environment and gain future efficiencies. The City’s goals and objectives for the project are similar to those that would benefit the Town:</p> <ul style="list-style-type: none"> • Assess current system applications to identify strengths and weaknesses in relation to current business needs • Identify challenges and areas for improvement or collaboration to identify potential solutions that better support effective, efficient business processes across multiple departments • Educate staff on functionality available in asset management/work order systems • Encourage staff to re-envision business and service delivery processes, with a goal of seeking more efficient, effective ways of operating and delivering services • Utilize a structured approach to manage resource availability and help identify and justify future resource needs <p>Public works operations often integrate work order systems and information source systems to receive and process data—such as resident request, pavement management, and GIS systems—used to account for signs, pavement markings, and intersections and inventory data. Public works operations often link systems to track asset types and conditions, group equipment by type and crew, and generate reports.</p>

2.2.4 Finalize and Publish Current Performance Measures and Continue to Develop New Measures

Table 2.2.4: Finalize and Publish Current Performance Measures and Continue to Develop New Measures

Finalize and Publish Current Performance Measures and Continue to Develop New Measures	
Initiative Summary	
	<p>The DPW must have a standard process for tracking and evaluating service delivery quality and for using data and information collected to inform management decisions and implement improvements. The DPW is finalizing a list of performance measures/KPIs to reflect its four core service areas of operations: administration, fleet maintenance, highway maintenance, and recycling and solid waste collection. However, DPW is not currently capturing sufficient information and data to report on any performance measures/KPIs, with the exception of pavement condition and funding levels. The DPW also reported many in-progress improvements and plans related to operations and service delivery, which performance measures/KPIs will help provide actionable insight into, such as efforts related to safety and training. Performance measurement and KPI development and expansion should also include data obtained</p>



Finalize and Publish Current Performance Measures and Continue to Develop New Measures	
	from systems and other software tools utilized by the DPW currently or in the future, when applicable.
Related Issue(s)	
<ul style="list-style-type: none"> • The DPW collects much of the data and information used to report on performance, progress, and outcomes manually via paper-based processes. Manually collecting data and information does not allow for all types of core operational metrics to be captured efficiently, consistently, and accurately. Therefore, some DPW business process improvement efforts and enhancements to service levels and quality lack detailed data to support justifications for resource allocation and requests. • The DPW lacks clarity regarding operational performance and outcomes related to funding and resource levels. Without a work order system to capture data and information, it is difficult to determine where current resources are being expended and where improvements might be needed. Furthermore, there are few opportunities to report out and demonstrate all of the projects successfully completed with the resources allocated, achieving the outcomes intended. 	
Action Items to Implement	
<ul style="list-style-type: none"> ☑ Task 1: Develop a performance measurement/KPI committee. DPW leadership should lead performance measurement/KPI development; however, input from staff from different divisions (and throughout Town departments) should be solicited and may lead to the development of meaningful measures related specifically to DPW operations as well as measures/KPIs related cross-departmental service delivery. Committee members should also act as ambassadors who can reinforce the importance and purpose of the performance measures/KPIs with their divisions/sections and as liaisons who can provide support with implementing necessary improvements. ☑ Task 2: The performance measurement/KPI committee should inventory all core processes related to core service delivery and develop an organized list that states the performance measure/KPI, its purpose, data source(s), responsible staff member(s), and information to be reported out. An example of a performance measure/KPI inventory is attached as Appendix E. This inventory should be centrally and electronically located where all department staff will have access to it. ☑ Task 3: The DPW committee should prioritize service delivery and business process improvements based on insight gained from measures/KPIs, giving greater weight to items that can yield greater returns in service delivery, customer service, workplace safety, and job performance. Identifying core services with related measures and indicators, as well as identifying services outputs and outcomes to be measured, will provide more detailed efficiency and effectiveness indicators—ultimately leading to more useful data for decision-makers and supporting transparency. ☑ Task 4: Identify which systems and technology should be used to generate, capture, and analyze data used for performance measures/KPIs. Using systems and technology (e.g., a work order or asset management system) allows for gathering and access to consistent and accurate data for assessing DPW service delivery as it relates to performance and desired outcomes. ☑ Task 5: The DPW committee should not only develop and monitor performance measures/KPIs, but also operate as a DPW think tank. The committee should meet quarterly. 	



Finalize and Publish Current Performance Measures and Continue to Develop New Measures

Members should update the group on the progress of their improvements. In addition, the committee should provide an opportunity for participants to discuss how to work through challenges and dilemmas with service delivery and business process improvements and how the use of performance measures/KPIs can support those efforts.

- ☑ **Task 6: The DPW should commit to finalizing and sharing initial performance measures/KPIs.** The DPW should include how each performance measure/KPI will be applicable to operations and service delivery outcomes.
- ☑ **Task 7: Foster a culture of continuous service delivery and business process improvement.** To foster a culture of continuous service delivery and business process improvement, the DPW committee should develop a reporting framework or system that would allow staff, residents, and stakeholders to view performance measures/KPIs and make suggestions. This could occur through a comment box on a webpage/dashboard or through a common email address solely used for recommendations. A representative from the committee should monitor the suggestions submitted and bring them to the committee table for discussion.

Anticipated Benefits



- The DPW will benefit from a centralized process for developing and reporting on performance measures/KPIs. This will also help keep DPW staff focused on improving services and processes that will yield the greatest benefit for the DPW, residents, and stakeholders.
- The DPW will be able to demonstrate a menu of core performance measures/KPIs to provide an accurate, consistent, and transparent look into DPW service delivery efficiency and effectiveness. Performance measure/KPI data can also be used to articulate the use of resources tied to demonstrated outcomes.
- DPW staff could use performance measures/KPI data to support daily scheduling decisions, monitor progress related to assigned tasks, and assess the efficiency and effectiveness of service delivery and project approach.
- The DPW would be able to monitor performance measures/KPIs to help ensure in-progress initiatives are completed on time, and evaluate the resource impacts of taking on new initiatives and increasing levels of service.



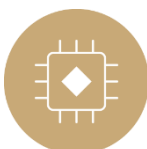
Risks

No Action

- No action may inhibit service delivery and business process improvements, and the DPW will continue to lack a consistent reporting structure. This could lead to stalled process improvements or a lack of prioritization of improvements.
- No action may lead to a lack of structure to accomplish process improvements and may also lead to a duplication of efforts, which can expend additional staff time that could be focused on other essential work.


During Implementation

- Meaningful performance measures/KPIs can take time to develop and publish. Staff should be encouraged to monitor a handful of core performance measures/KPIs initially while continuing to further develop meaningful performance measures and/or KPIs to help assess internal

Finalize and Publish Current Performance Measures and Continue to Develop New Measures		
operations and service delivery, identify areas for improvement, and provide a transparent look into department operations for residents and stakeholders.		
Implementation Timeline		
<p>Priority</p> 	<p>Though the development of core DPW performance measures/KPIs has commenced, all aspects should be continuously supported through completion without interruption until the initial list of performance measures/KPIs has been published, ideally within six to nine months. Continuous development of meaningful performance measures/KPIs should continue into the future. Furthermore, completing the implementation of all relevant TUAM modules (initiative 2.2.3) will demonstrate how the use of technological systems will allow for more consistent, accurate, and useful reporting of data which can be used in the development of, and reporting on performance measures/KPIs.</p>	<p>Complexity</p> 
Best Practice Considerations/Examples		
	<p>Many organizations choose to develop and utilize performance measures/KPIs as the basis for evaluating service delivery levels and demonstrating efficiency and effectiveness. An example of a public works performance measure/KPI inventory is attached as Appendix E. The measures are common examples from public works operations with robust, mature performance management programs.</p>	

2.2.5 Perform a GIS Needs Assessment



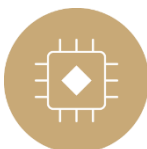
Table 2.2.5: Perform a GIS Needs Assessment

Perform a GIS Needs Assessment	
Initiative Summary	
	<p>DPW should work with other applicable Town departments/divisions to undertake a GIS needs assessment and identify GIS resource needs. By building upon DPW's substantial work to date and developing a more connected GIS asset inventory to accurately track information related to Town infrastructure and assets, it is anticipated that the DPW will benefit from a future GIS-centric approach to track all costs associated to the construction, maintenance, and repair of all Town assets. It is also anticipated that comprehensive GIS systems will enable the DPW to accurately manage, assess, and forecast the condition of assets throughout their entire life cycle, assisting DPW with the development of long-range capital plans. A future connected GIS environment may also provide data-sharing opportunities with other Town departments to inform routine maintenance and capital program development decisions across all Town departments.</p>
Related Issue(s)	
<ul style="list-style-type: none"> The Town currently lacks sufficient resources to efficiently maintain and expand a sophisticated GIS infrastructure and asset management system(s) across all applicable Town departments. 	



Perform a GIS Needs Assessment	
Action Items to Implement	
<p><input checked="" type="checkbox"/> Task 1: Establish a working group of key DPW and other applicable Town department staff to assess the Town’s current and future GIS needs. DPW leadership should lead the GIS needs assessment; however, staff input from different divisions and other Town departments should be solicited, specifically the Town engineer and related capital design and development staff.</p> <p><input checked="" type="checkbox"/> Task 2: Continue current efforts related to collecting infrastructure and asset information. Continue to build upon DPW’s current efforts related to the collection, analysis, and use of infrastructure and asset information housed in GIS systems and databases. Continue work to automate the collection of data and information (e.g., utilizing TUAM software and work order system data and information) and its input into GIS systems and databases.</p>	
Anticipated Benefits	
	<ul style="list-style-type: none"> • The DPW could use a connected GIS environment to support the management, capital planning, construction, maintenance, and replacement of Town assets and infrastructure. • The DPW could track—in greater detail—labor, equipment, and material costs in the GIS environment to inform decision-making for resource allocation, inform budget development, and support resource requests. • The DPW may realize an increased ability to track data and information related to the complete life cycle of assets to proactively manage risk and accurately forecast capital asset replacement timelines and costs. • The DPW could also use a connected GIS environment to streamline the procurement, storage, and distribution of equipment and materials, and accurately track information and costs associated with noncapital DPW and Town assets.
Risks	
<p>No Additional Action</p> <ul style="list-style-type: none"> • No action may adversely impact the DPW’s ability to prioritize capital asset maintenance and replacement or to forecast capital replacement costs with greater accuracy. • No action may create inefficiencies related to capital maintenance and replacement prioritization and may not allow sufficient opportunity for resident and stakeholder input, causing tension between the DPW and the public. • No action may limit DPW/SWSB staff’s ability to access real-time asset information needed to respond to emergencies and plan for capital improvements. 	
<p>During Implementation</p> <ul style="list-style-type: none"> • The DPW should continue to support existing GIS data and information collection efforts, identifying additional asset and infrastructure information to be captured and cataloged. The DPW should also continuously share GIS data and information related to Town assets in order to communicate the importance of having such information available. 	
Implementation Timeline	



Perform a GIS Needs Assessment		
<p>Priority</p> 	<ul style="list-style-type: none"> Much of the foundational work to support this initiative has already begun. However, to help ensure expansion of DPW and townwide GIS capabilities, the GIS working group should be identified and convene its first meeting within six to nine months. The group would then weigh in on proposed resources needs in the next budget development cycle. Once established, all other elements and tasks associated with this initiative should be ongoing. 	<p>Complexity</p> 
Best Practice Considerations		
	<p>Many agencies combine work order and GIS data and information to develop asset and infrastructure maintenance and replacement schedules and to support the development of operating and capital budgets.</p> <p>The DPW may benefit from an enhanced GIS environment to track asset data and information related to streets, such as the pavement condition index (PCI) of roadways and degradation calculations, and from sharing data with other departments, such as SWSB and P&R. The DPW could also use the enhanced GIS environment to manage and track work order creation and issuance with other departments where there is overlap in service delivery. For example, P&R will use the future system with a GIS-centric approach to track all costs associated to the construction and maintenance of park assets and infrastructure. The continued development of an enhanced GIS environment will require resources to maintain systems, update information consistently, and provide reports and data exports to support goal and initiative tracking as well as performance measurement and KPI reporting.</p> <p>Furthermore, communities that have dedicated GIS personnel can expand their GIS use well beyond the traditional utility base map information. Lexington, MA¹, Westwood, MA², and Stonington, CT³ have dedicated GIS personnel and as a result have been able to bring most of their GIS maintenance activities and service delivery in-house. In doing so, these communities are able to maintain and update their GIS base layers consistently and efficiently. This allows for a wider array of information and assets types to be tracked and accessed instantaneously, when needed. For example, having complete control of GIS functionality internally allows for service request items and types such as water main breaks and/or sewer main breaks to be documented and archived efficiently. Additionally, all capital asset information can be housed in GIS allowing for instant access to an asset's location, condition status, work schedules, and capital replacement cost. This allows for communities to more effectively and more accurately plan for future repair and replacement costs and develop annual capital improvement budgets. Finally, utilizing GIS as an asset management tool in conjunction with a work order system allows for work order data to be captured in the GIS environment, not only allowing for more detailed asset information to be maintained, but also for enhanced</p>	

¹ Maps & Geographic Information Systems, <www.lexingtonma.gov>

² Westwood GIS, <www.townhall.westwood.ma.us>

³ Geographic and Property Information Network, <www.gis.stonington-ct.gov>



Perform a GIS Needs Assessment	
	functionality related to accessing data to report out on performance measures and KPIs to help assess the efficiency and effectiveness of service delivery.

2.2.6 Provide a Greater Level of Capital Project Budget Detail

Table 2.2.6: Provide a Greater Level of Capital Project Budget Detail

Provide a Greater Level of Capital Project Budget Detail	
Initiative Summary	
	<p>DPW may benefit from the opportunity to have a more detailed capital improvement service line-item budget. Additional line-item information related to highway and other ROW management and maintenance activities may allow for DPW to better justify resource expenditures and requests and may allow for more detailed reporting opportunities related to efficiency and effectiveness of service delivery, which in turn could be used for KPI development and reporting. For example, budget line items dedicated to, preventive maintenance, minor reconstruction, major reconstruction, and sidewalk maintenance would help the DPW manage funding more efficiently and allow for a more detailed articulation of resource use to residents and stakeholders.</p>
Related Issue(s)	
<ul style="list-style-type: none"> • The DPW could benefit from having the additional detail (funding and expense data) to support justifications for increased funding, when necessary. • The DPW could benefit from having the additional detail (funding and expense data) to support performance measure/KPI development and reporting. • The DPW could benefit from having the additional detail (funding and expense data) to support increasing road surface rating (RSR) scores and articulating how various funding levels may impact pavement conditions. 	
Action Items to Implement	
<ul style="list-style-type: none"> ☑ Task 1: Identify additional budget line items related to capital highway and ROW maintenance and rehabilitation. Having the funding for capital highway and ROW maintenance and rehabilitation outlined in DPW’s operating budget conforms to Town norms. Nonetheless, the DPW should develop a summary table (table is in progress) that provides an overview of all active capital programs, all projects approved for funding in a current fiscal year (FY), and future FY projects. This would provide the basis for identifying the additional budgetary line items to be added to the operating budget. ☑ Task 2: Work with the Town manager and finance director to implement changes. DPW should work with Town executive management to develop, review, and consider changes to funding allocation descriptions and line items within the operating budget as outlined in the summary table referenced above. 	




Provide a Greater Level of Capital Project Budget Detail		
Anticipated Benefits		
	<ul style="list-style-type: none"> Greater budget detail will focus attention on the Town’s highway and ROW infrastructure goals and financial capacity. Capital programs generally have multiyear budgets designed to expend funds across longer time frames in order to fund projects that improve the physical assets of the Town. Capital projects typically require funding allocations that take place beyond a single FY; therefore, more detailed budget line items regarding capital services and capital projects will help specify amounts of expended funds for specific projects/services and may assist with end-of-FY fund rollover discussions. 	
Risks		
<p>No Action</p> <ul style="list-style-type: none"> No action may result in the DPW experiencing challenges with articulating and managing capital service delivery costs efficiently and effectively to help ensure the greatest cost-effectiveness for the Town. 		
<p>During Implementation</p> <ul style="list-style-type: none"> The DPW should identify and organize the cost elements to eventually be allocated to proposed account revisions (e.g., vendors, services, and supply types, etc.). 		
Implementation Timeline		
<p><u>Priority</u></p>	<p>Discussions related to this initiative should align with the Town budget development process. Any additional funding or resources approved for elements of this initiative would begin to be utilized in the first FY they are allocated.</p>	<p><u>Complexity</u></p>
Best Practice Considerations/Examples		
	<p>Daly City, California, for example, budgets its capital funding allocations related to highway/ROW capital maintenance in individual budget line items (e.g., slurry seal, crack sealing, sidewalk, spot repairs, and full-depth reclamation, etc.).⁴ This level of budget detail and expenditure tracking allows for greater insight into which portion of overall funding continues to be allocated to shorter-term maintenance and rehabilitation projects versus those longer-term projects which may be more costly upfront, but provide greater value for the community and greater net gains to the overall infrastructure quality score in the long-run.</p>	

⁴ City of Daly City, “Capital Improvement Program (CIP) Budget for Fiscal Year 2023,” <www.dalycity.org>

2.2.7 Provide Additional Opportunities for Residents to Learn About Recycling and Solid Waste Programs and Services

Table 2.2.7: Provide Additional Opportunities for Residents to Learn About Recycling and Solid Waste Programs and Services

Provide Additional Opportunities for Residents to Learn About Recycling and Solid Waste Programs and Services	
Initiative Summary	
	<p>Enhance efforts that promote increased recycling and solid waste diversion, including programs related to composting, school recycling, special events and programs, educational events, and other source-reduction and incentive-based recycling programs.</p>
Related Issue(s)	
<ul style="list-style-type: none"> • The DPW could provide additional hours of operation for residents to access the recycling center. • The DPW could develop additional programs and outreach activities and support coordination of special projects, community events, and school educational programs. • The DPW could more frequently audit collection routes to help ensure compliance with acceptable disposal of recycling and solid waste items. • The DPW will be better positioned to comply with environmental regulations and diversion rate targets, helping to ensure financial incentives are realized. 	
Action Items to Implement	
<ul style="list-style-type: none"> ☑ Task 1: Develop an education campaign. The DPW should develop marketing and outreach materials to educate customers and residents about its efforts related to solid waste collection and recycling. Materials should include information related to recycling trends, waste reduction, diversion, new technologies, and tips related to best practices for schools and the community. ☑ Task 2: Solicit feedback from the public. The DPW should survey the public to gauge interest for recycling and solid waste programs. The survey should ask whether the respondent is interested in learning more about Town recycling efforts, their professional background (e.g., developer, business owner, resident, environmentalist, etc.), and specific topics they are interested in hearing more about. This will help guide the creation of topics for the educational events throughout the year. Other questions can be included to help guide the framework for the educational campaign, but the survey should be brief. The survey should also allow the public to provide an email address so that interested respondents can be included on emails for future services and events. ☑ Task 3: Develop a schedule for education events. Using the survey results, plan a schedule of educational events throughout the year. Topics of events may be directly related to DPW services or may be relevant to new trends and/or topics. Events should be designed to assist people in developing effective ways to recycle at home, at school, and in the office and should involve regularly speaking to various groups, including students, older adults, residents, and community organizations. Finally, understanding recycling concerns from residents and working to develop answers to their questions and provide solutions will help promote compliance and buy-in. In 	



Provide Additional Opportunities for Residents to Learn About Recycling and Solid Waste Programs and Services

developing these events, the DPW should consider bringing in professionals from outside agencies to help with the subject matter. Outside agencies may include state agencies, college and university research institutions, and nonprofit advocacy organizations.

- ☑ **Task 4: Develop educational tools and resources to keep the public engaged throughout the year.** Produce annual recycling and solid waste information guides and educational materials, and use the Town’s website and school social media outlets to inform the community. Educational tools could include a social media page, short videos about educational tips, and a webpage with recommended resources and best practices. On a webpage, DPW should also provide recycling and solid waste guides and brochures.

Anticipated Benefits

- | | |
|--|--|
| | <ul style="list-style-type: none"> • The DPW may benefit from data and information gathered from educational and outreach efforts, which could help with content and data for preparing grant requests. • The DPW could play a central role as a community resource for education and guidance. Educational and outreach efforts may help the DPW become a transformational service provider in addition to being a transactional service provider. • The DPW will continue to be seen as a vital community resource, which will help build relationships and trust with the public. • The DPW will be able to enhance its role as an environmental steward of the Town, increasing the overall quality of life for all residents. |
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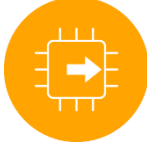
Risks

- No Action**
- No action will not impact the services the DPW currently provides. However, the DPW will miss opportunities to implement behavior-changing educational campaigns that can transform relationships with the public and improve the physical makeup of the Town.

- During Implementation**
- An educational campaign may take additional personnel and fiscal resources to implement; therefore, adequate support should be given to help ensure success. If the campaign accomplishes what is intended, the benefits gained can outweigh the initial investment and will continue to add value for DPW and the community in the future.


Implementation Timeline




<p>Priority</p>	<p>Discussions related to this initiative should start within nine months—after other initiatives in this report have begun. Funding and resource discussions should align with the Town’s budget development process. Any additional funding or resources approved for elements of this initiative would begin to be utilized in the first FY they are allocated.</p>	<p>Complexity</p>
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Provide Additional Opportunities for Residents to Learn About Recycling and Solid Waste Programs and Services	
Best Practice Considerations/Examples	
	<p>Hingham high school in Hingham, Massachusetts, developed a source separation program for the school cafeteria, where materials are separated for recycling and composting rather than throwing all materials in the trash. An educational program was developed to train students on how to properly identify and separate compost, recycling, and trash items and articulate the benefits of doing so. As a result, the school increased diversion rates by 80%, significantly reducing materials sent to landfills, eliminating a number of trash dumpsters, and reducing the size of remaining dumpsters needed to accommodate trash flows.</p>

2.2.8 Continue to Assess Long-Range Space Needs of DPW at the Spragueville Road Site

Table 2.2.8: Continue to Assess Long-Range Space Needs of DPW at the Spragueville Road Site

Continue to Assess Long-Range Space Needs of DPW at the Spragueville Road Site	
Initiative Summary	
	<p>With all DPW administrative and maintenance functions, all available equipment and fleet storage facilities at the Spragueville Road site, and the unlikely prospect of acquiring additional space in the future, DPW should continuously assess its long-term space needs. Lack of adequate space to house certain DPW functions creates an inefficient and, in some cases, unsafe workspace for staff. Furthermore, future space needs will need to be determined in conjunction with an assessment of current services and the likelihood of what additional services DPW will be required to provide in the future.</p>
Related Issue(s)	
<ul style="list-style-type: none"> • The DPW’s current equipment and fleet storage areas are nearing or are at capacity, resulting in vehicles, equipment, attachments, and materials having to be stored outside occasionally. • The DPW’s current maintenance facility cannot accommodate adequate equipment/vehicle lifts, certain DPW vehicles, and certain fire apparatuses due to the current ceiling height being too low. • The DPW could use additional areas for composting and recycling operations due to the recent success of the programs and increased number of residents utilizing composting and on-site recycling services. • The DPW is limited in its ability to expand administrative and maintenance facilities at the Spragueville Road site due to its location near a wetland area. • The Town could initiate a condition and needs assessment for all Town-owned buildings and facilities to inform future capital and maintenance needs by gathering specific architectural and engineering data and cost information. 	

Continue to Assess Long-Range Space Needs of DPW at the Spragueville Road Site		
Action Items to Implement		
<ul style="list-style-type: none"> ☑ Task 1: Continue to assess the appropriateness and viability of DPW’s current facilities upgrade and expansion plans. Continue discussions with the Town manager, finance director, Budget and Finance Review Committee, and stakeholders to assess the viability and appropriateness of current, planned upgrades and improvements to DPW facilities. Determine if current plans are sufficient to satisfy all of DPW’s physical operation needs. ☑ Task 2: Continue to assess how DPW operations have changed and how operations might need to change over the next five years. Related to the core services DPW currently provides and additional services it may be required to provide to support other Town department operations, physical space requirements may need to be addressed. ☑ Task 3: Assess Town capacity to fund improvements, expansions, and/or upgrades. Continue discussions with the Town manager, finance director, BFRB, and stakeholders to understand if financial capacities to meet stated DPW needs are possible. At a minimum, DPW should identify the financial implications of current expansion plans and how that may conflict with the Town’s current financial policies and capacity. 		
Anticipated Benefits		
	<ul style="list-style-type: none"> • DPW will benefit from a more viable workspace for staff to address increasing responsibilities related to types or equipment and vehicles serviced. • DPW will benefit from maintenance and storage facilities that are code and safety compliant, adequate in height for certain types of maintenance, properly ventilated, properly illuminated, and have adequate mechanical systems. • The Town will benefit from adequate facilities that better protect the significant investments made in vehicles and equipment. 	
Risks		
<p>No Action</p> <ul style="list-style-type: none"> • No action may result in the inability for DPW to increase levels of service related to certain core functions, especially those functions that require additional storage and maintenance of large tools, equipment, and vehicles. • No action may result in the inability for the DPW to accommodate additional administrative and service functions related to parks maintenance operations. 		
<p>During Implementation</p> <ul style="list-style-type: none"> • The DPW should develop business and service continuity plans to ensure minimal impact to service delivery is experienced while the major physical transformation is undertaken. 		
Implementation Timeline		
<p>Priority</p> 	<ul style="list-style-type: none"> • Discussions related to this initiative should continue with a confirmed approach to addressing DPW’s needs outlined within 12 to 18 months. Funding and resource discussions should align with the Town budget development process and any additional funding or resources approved for elements of this initiative would begin to be utilized in the first FY they are allocated. 	<p>Complexity</p> 



Continue to Assess Long-Range Space Needs of DPW at the Spragueville Road Site	
Best Practice Considerations/Examples	
	<p>The Town of Montague, Massachusetts, demonstrated the benefits of storing public works vehicles and equipment inside by highlighting improvements in the following categories:</p> <p>Employee Safety: Employee safety can be compromised when trying to access and clear off vehicles and equipment covered in snow and ice or during inclement weather events.</p> <p>Public Safety: Vehicles covered by snow or ice can increase response times, resulting in unsafe conditions for the public.</p> <p>Protection of Equipment: Continuous outdoor storage of vehicles and equipment accelerates deterioration.</p> <p>Stormwater Pollution Control: Equipment and vehicles stored outdoors usually are not done so in accordance with strict environmental control measures (i.e., leaking oil and gas seeping onto the ground.).</p> <p>Cost-Effective Operations: It is more cost effective to invest in and maintain adequate maintenance and storage facilities rather than maintaining and replacing rapidly deteriorating equipment and vehicles.</p> <p>More Efficient Operations: Vehicles and equipment stored outdoors have been shown to have more fuel-related maintenance problems and utilize more fuel due to increased warm-up times. Furthermore, cold storage can freeze condensation in air tanks, impact hydraulic oil viscousness leading to more rapid hose and pump failure, and affect efficiency by having to load and unload equipment each day.</p>

2.3 Summary of Primary DPW Strengths and Continued Support

This performance assessment analysis focused on identifying opportunities to improve business processes, business systems, staffing structures, and overall service delivery; however, current DPW strengths were observed during BerryDunn’s analysis and fact-finding sessions with staff and stakeholders. The eight primary initiatives identified above are designed to continue to enhance and develop the three primary strengths summarized below. However, without dedicated resources and support, DPW may be challenged to realize the full implementation of all of the initiatives outlined and therefore may not realize the full benefit projected. Additional, personnel and non-personnel, resources may allow for initiatives to be completed in a timelier manner and will allow the DPW to continue to leverage its primary strengths identified below.

Table 2.3.1: Summary of Primary DPW Strengths

Core Strengths and Continued Support		
Business Processes and Systems	Current Strength	The DPW is forward-thinking and has leadership and staff who focus on business process and business system improvements to help the DPW become more effective and efficient with its service delivery. One notable area where DPW has made substantial progress is in the realm of GIS. The DPW effectively leverages its current GIS resources, utilizing GIS data and information in daily decision-making, operating and capital budget development and management, and for long-range planning efforts. Nonetheless, continuing to understand how to appropriately expand GIS capabilities, both for the DPW and townwide, and leveraging the additional data capture and analysis capabilities is expected to benefit the Town in numerous ways especially related to resource allocation decisions and performance reporting in the future.
	Continued Support	For the DPW to continue to leverage GIS data and information for decision-making and planning, and also enhance its capabilities to realize greater benefits related to department efforts as well as supporting townwide goals and initiatives, dedicated resources (in-house and/or contracted) might have to be allocated to support current and future GIS initiatives. Additional resources will help to build a foundation for successful implementation of related initiatives identified during the performance review process, such as work order system implementation and performance measure/KPI developments and reporting. Furthermore, expanding GIS capabilities may allow for additional data and information to be leveraged and considered during the budget development process or when assessing the effectiveness and efficiency of service delivery.
	Benefits Projected	As outlined in initiative 2.2.5 above, the projected efficiencies that may be realized and detailed data and information that will become accessible to consider during decision-making processes will not only benefit DPW operations significantly, but will also benefit other, applicable Town department operations significantly.
	Current Strength	DPW leadership demonstrated a commitment to data-driven decision-making in managing the DPW's financial



Core Strengths and Continued Support		
Strong Leadership		resources, with approaches to efficient and effective service delivery, and when conducting long-range planning. As such, operating and capital budget requests are aligned with justifiable metrics and demonstrated outcomes, and approaches to service delivery are aligned with maximizing value related to both funding and completion of the task/project.
	Continued Support	DPW leadership will need sufficient resources, both personnel and non-personnel, as it continues to demonstrate how varying levels of resources translate into varying levels of service, and communicating which scenarios will yield the greatest results and intended outcomes for the community.
	Benefits Projected	As outlined across multiple initiatives above, the benefits of continuing to support DPW leadership with efforts related to aligning operating and capital funding requests to projected outcomes will continue to yield the greatest benefit and value for the community.
Dedicated Staff	Current Strength	DPW staff demonstrated a commitment to increasing efficiency and effectiveness of service delivery across multiple DPW core service areas. Staff regularly communicate with leadership to inform decision-makers of areas where improvements could be made to continue to provide the maximum value and benefit to the community.
	Continued Support	The DPW will need sufficient personnel resources to continue to provide the highest level of service possible to the community while also ensuring business continuity by having adequate personnel to train and develop for advancement.
	Benefits Projected	As outlined in initiative 2.2.1 above, the benefits of continuing support staff in critical roles and identifying potential successors to backfill planned and/or unexpected vacancies will help ensure leadership and service delivery continuity.

2.4 DPW Benchmarking and Peer Comparisons

Peer comparisons can provide useful insights into how the DPW compares with other similar public works operations. The community DPW serves is diverse across demographic, community, economic, and geographic characteristics. That said, the selection of peers for comparison attempts to reflect—as closely as possible—the unique elements throughout the Smithfield community and the DPW service delivery framework.

Comparing one community to another in an attempt to analyze operation frameworks and resources levels should never be the sole criteria in determining if there is an excess or deficiency in level of resources or how efficiently and effectively services are being delivered. This is because many factors cannot be known by simply accessing publicly available data with regard to how other agencies identify and allocate resources for municipal service delivery, what community priorities are, how service delivery is organized throughout the agency, or what specific infrastructure characteristics a community must contend with. However, if carefully analyzed peer comparisons can provide one option for benchmarking how cost effectively services are being delivered but provide limited usefulness for assessing service delivery performance. To that end, BerryDunn and the Smithfield PMT identified similar community and service delivery characteristics from the following peers: Belmont, MA; Cumberland, RI; Lincoln, RI; Stoneham, MA; and Bloomfield, CT. Rhode Island peers were selected based on proximity to Smithfield, population size, jurisdiction size, socioeconomic similarities, general fund operating budget levels, and public works operating budget levels. Massachusetts peers were chosen because of similar criteria; however, these peers were selected mainly based on service delivery frameworks that are similar in process to Smithfield DPW operations, but also demonstrate industry best practices in public works service delivery despite the differences in financial and personnel resource levels.

The table below highlights core socioeconomic characteristics and fiscal data of peers identified for select core operational and service delivery component comparisons.

Table 2.4.1: Population and Socioeconomic Metrics⁵

Population and Socioeconomic Data						
	Belmont, MA	Cumberland, RI	Lincoln, RI	Stoneham, MA	Bloomfield, CT	Smithfield, RI
Population	27,295	36,434	22,499	23,244	21,301	22,118
Jurisdiction (sq. mi.)	4.65	26.49	18.07	6.02	26.40	26.23
Population Density (sq. mi.)	5,872	1,374	1,246	3,864	753	843
Median Household Income	\$151,502	\$104,613	\$94,571	\$105,541	\$84,735	\$87,819
Operating Budget - General Fund – (\$000)⁶	\$77,537	\$34,826	\$26,302	\$32,038	\$46,169	\$38,236

Furthermore, peer comparisons can provide useful insights into how DPW's funding compares with similar public works operations. And while DPW's operational and service delivery framework is unique in many ways with regards to staffing, responsibilities, funding, and community characteristics, the selection of peers attempts to reflect as closely as possible the unique elements found throughout the DPW.

Table 2.4.2: DPW Operating and Capital Budget Metrics⁷

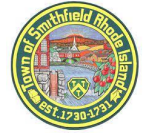
Operating and Capital Budget						
	Belmont, MA	Cumberland, RI	Lincoln, RI	Stoneham, MA	Bloomfield, CT	Smithfield, RI
DPW Budget (\$000)	\$6,482	\$6,602	\$4,568	\$2,104	\$4,439	\$4,745

⁵ United States Census Data 2020, <www.census.gov>

⁶ Belmont, MA Proposed Budget FY 2023, <www.belmont-ma.gov>, Cumberland, RI, Proposed Budget FY 2023, <www.cumberlandri.org>, Lincoln, RI, Approved Budget FY 2023, <www.lincolnri.gov>, Stoneham, MA Proposed Budget FY 2023, <www.stoneham-ma.gov>, Bloomfield, CT, Adopted Budget FY 2023, <www.bloomfieldct.gov>, Smithfield, RI, Adopted FY 2023 Budget, www.smithfieldri.com

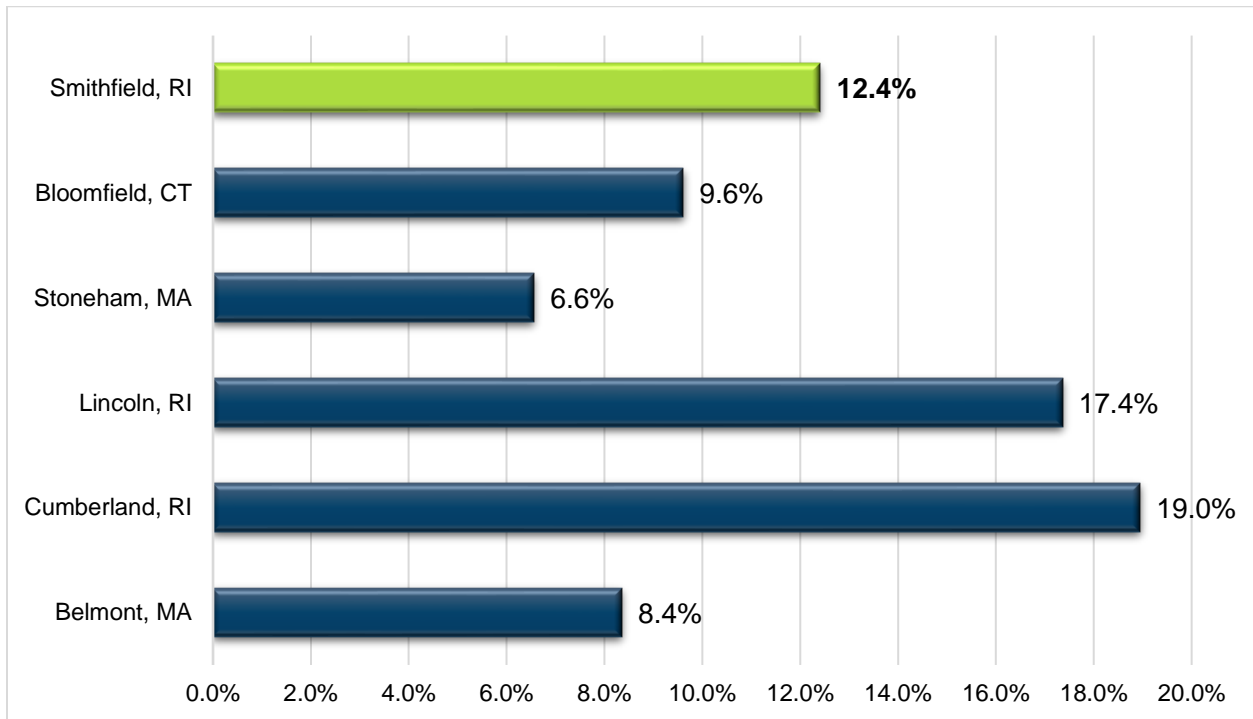
⁷ Ibid.

Operating and Capital Budget						
	Belmont, MA	Cumberland, RI	Lincoln, RI	Stoneham, MA	Bloomfield, CT	Smithfield, RI
DPW Budget % of General Fund	8.4%	19.0%	17.4%	6.6%	9.6%	12.4%
Highways/ Sidewalks Capital Budget (\$000)	\$1,857	\$250	\$150	\$448	\$2,333	\$700
Highways/ Sidewalks Capital Budget % of General Fund	2.4%	0.7%	0.6%	1.4%	5.1%	1.8%
Average Highways/ Sidewalks	Average Across Peers: 2.0% National Average: 4.1%					
Centerline Miles Maintained	75 Miles	200 Miles	<i>Data Unavailable</i>	64 Miles	106 Miles	103 Miles
DPW Expenditures per Resident	\$237.47	\$181.21	\$203.02	\$90.52	\$208.40	\$214.53
Average DPW Expenditures per Resident	Average Across Peers \$184.12					
DPW Total FTEs	41	37	35	26	27	16
DPW FTEs per 1,000 Residents	1.50	1.02	1.56	1.12	1.27	0.72



BerryDunn reviewed available FY 2023 budget information across peer cities and towns related to agencies' general fund operating resources and the percentage allocated to public works operations. Every effort has been made to only compare operating and capital budget allocations that are similar to those allocations found in DPW's operating budget segments. The budget data show that the highest projected allocation to public works operations was in Cumberland, RI; the lowest projected allocation was in Stoneham, MA. The average projected allocation to public works operations for FY 2023 across all peer agencies analyzed is 12.2%, which is slightly lower than the total DPW allocation in Smithfield.

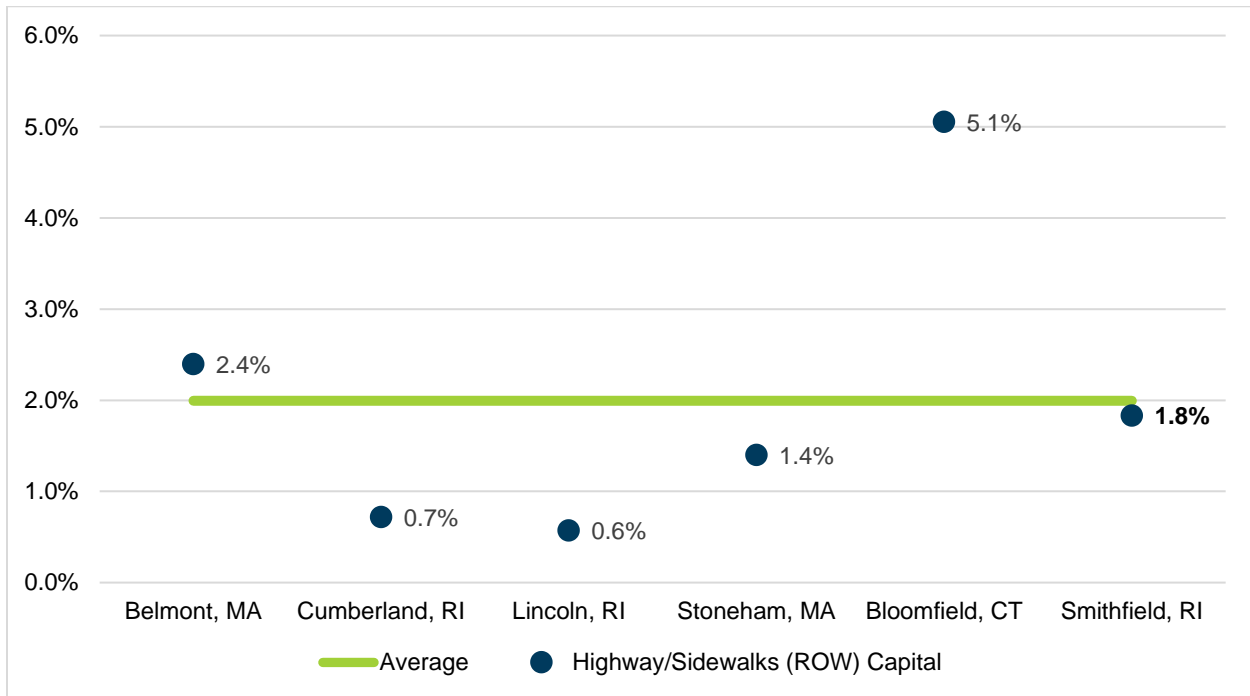
Figure 2.4.1: Public Works Percentage of General Fund Expenditures

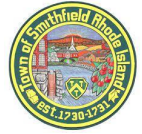




BerryDunn reviewed available FY 2023 budget information across peer cities and towns related to agencies' highway/sidewalk/ROW capital expenditures as a percentage of overall general fund expenditures. Every effort has been made to only compare ROW/capital allocations that are similar to those allocations found in DPW's operating budget segments. The budget data show that the highest projected proportional allocation was in Bloomfield, CT. The lowest projected proportional allocation was in Lincoln, RI. The average projected highway/sidewalk/ROW capital allocation for FY 2023 across all peer agencies analyzed is about 2.0%, which is slightly higher than the expected expenditures in Smithfield.

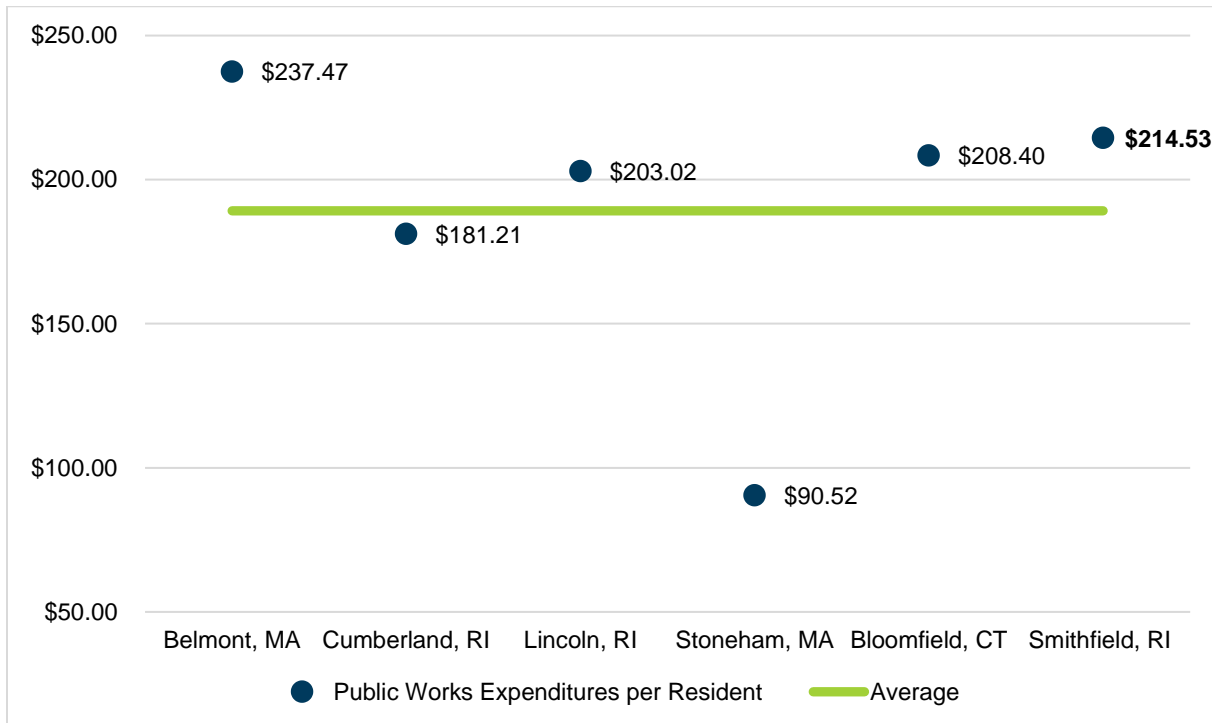
Figure 2.4.2: Highway/Sidewalk Capital Expenditures as a Percent of General Fund FY 2023





BerryDunn reviewed available FY 2023 budget information across peer cities and towns related to agencies' general fund spend per resident related to public works operations. Every effort has been made to only compare operating and capital budget allocations that are similar to those allocations found in DPW's operating budget segments. The budget data show that the highest projected spend per resident was in Belmont, MA. The lowest projected spend per resident was in Stoneham, MA. The average projected spend per resident for FY 2023 across all peer agencies analyzed is \$189.19, about 11.8% lower than the projected spend per resident in Smithfield.

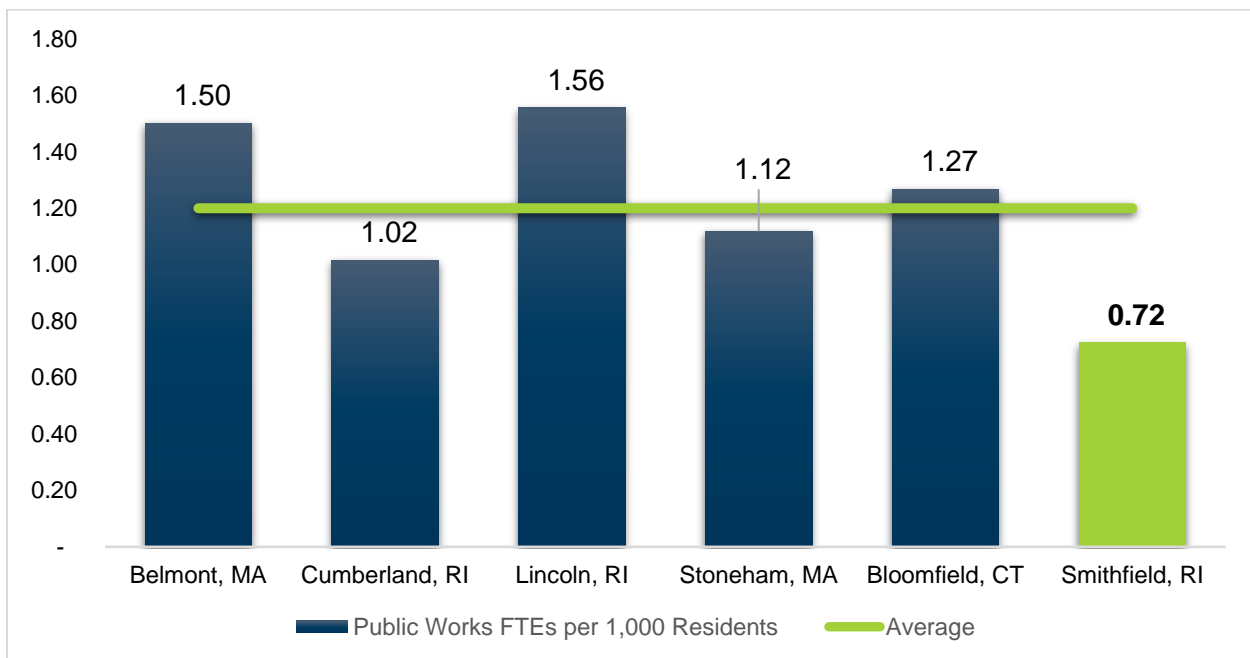
Figure 2.4.3: Public Works Expenditures per Resident





To assess workload levels across peer agencies in comparison to available personnel resources allocated to Smithfield public works operations, BerryDunn calculated funded full-time equivalent (FTE) staffing resources available per 1,000 residents as well as available FTE resources per 1,000 residents across peers. Every effort has been made to only include and compare FTE resource levels across similar divisions that make up Smithfield’s DPW (e.g., parks maintenance staff have been excluded from DPW comparisons since the parks maintenance function exists in the Smithfield P&R department). The budget data show the highest number of available public works FTE resources was in Lincoln, RI. The lowest number of available public works FTE resources was in Smithfield. The average number of available FTE resources across peer public works departments is 1.29 FTE per 1,000 residents, about 78.3% higher than the projected FTE level per 1,000 residents in Smithfield.

Figure 2.4.4: Public Works FTEs per 1,000 Residents



2.5 DPW Benchmarking and Performance Measures/KPIs

An area of emerging emphasis for the DPW is a department-wide approach and system for performance management to support the DPW’s operational efficiency and transparency efforts. The DPW has developed a draft list of performance measures/KPIs soon to be published and reported on. Nationally, more and more agencies have developed robust performance management frameworks to continuously assess service delivery efficiency and effectiveness.

There are opportunities for the DPW to improve its performance measure/KPIs inventory (see Appendix E). Also, there are opportunities for improvement related to communications to staff about what is involved in consistent performance analysis and how rigorous measures of organizational performance is essential to the DPWs overall success.

The DPW has developed draft performance measures/KPIs below that tie directly to the four core areas of service it provides. While this performance data is not yet published, DPW should make sure these data are shared with staff, stakeholders, the BFRB, and residents once completed. Since these performance measures/KPIs are not yet published, the DPW will continue to seek feedback from stakeholders and refine, adjust, add, and/or delete as needed.

In addition to the metric driven measures outlined in the table below, that is, those performance measure/KPI types that generally reflect quantity, quality, efficiency, and effectiveness of work performed and services delivered, there are also reporting, regulatory, compliance, and business process performance measures/KPIs the DPW has developed as well. These current draft measures include:

- Update GIS databases to reflect all pavement, sidewalk, and guardrail maintenance and improvement work completed annually. GIS updates may periodically be performed over the course of a FY year as updates are generally performed when a specific project has been completed. Nonetheless, the target for the measure is 100% of pavement, sidewalk, and guardrail related work completed needs to be updated in GIS databases before the close of the FY in which the project(s) occurred.
- Complete and submit quarterly and annual water quality reports on time. The target for the measure is 100%.
- Complete and submit regulatory reports to the Board of Health and Water Resources Board on time. The target for the measure is 100%.
- Complete flushing of the water distribution system annually. The target for this measure is 100% of the system.
- Track the amount of annual pavement maintenance and repair funding allocated to maintenance/repair type projects versus minor/major rehabilitation projects to assess the ideal distribution ratio needed to provide the maximum increase annually to the overall roadway surface rating (RSR).

As stated above, the reporting, regulatory, compliance, and business process performance measures/KPIs are still in draft form. DPW is currently organizing an approach to begin capturing and analyzing the necessary data required to report on measures outlined. Much of this data capture and analysis effort will be supported by the completion of core Initiative 2.2.3.

**Table 2.5.1: Current DPW Draft Performance Measures/KPIs
FY 2023 Baseline & Current Data, FY 2024 Targets (unless otherwise noted)**

DPW Draft Performance Measures/KPIs				
Highway				
	Baseline (Starting Point from Which to Assess Progress)	Current Report (Indicator of Performance)	Annual Target (What is Desired to be Achieved for Specific Year)	Notes
Increase RSR to 72.2 by 2033 (0.41 increase annually) (current DPW draft measure)	65.98 (2018)	68.00 (2023)	72.2 (2033)	Progress made/staff responsible
Amount of completed sidewalk repair work updated to the GIS database (current DPW draft measure)	1,010 feet of damaged sidewalk	Data Capture In Progress	50 linear feet repaired annually	Progress made/staff responsible
Repair or replace 10% of damaged guard rails annually (current DPW draft measure)	653 feet of known damage	Data Capture In Progress	20% of baseline repaired annually	Progress made/staff responsible
Repair or replace 10% of damaged signposts annually (current DPW draft measure)	198 known damaged poles	Data Capture In Progress	20 signposts repaired or replaced annually	Progress made/staff responsible
Repair or replace 10% of damaged signs annually (current DPW draft measure)	480 known damaged or faded signs	Data Capture In Progress	48 signs repaired or replaced annually	Progress made/staff responsible
Fleet				
	Baseline	Current	Target	Notes
Perform scheduled vehicle maintenance per preventive maintenance schedules 95% of the time (current DPW draft measure)	75%	80%	95%	Progress made/staff responsible

DPW Draft Performance Measures/KPIs				
SWSB				
	Baseline	Current	Target	Notes
Percentage of distribution system surveyed for leaks annually (current DPW draft measure)	Specific areas/sections of the system identified for surveys, totaling at least 50% of the complete system	Data Capture In Progress	100% percent of the areas/sections identified were surveyed for leaks	Progress made/staff responsible
Refuse and Recycling				
	Baseline	Current	Target	Notes
Reduce total missed refuse and recycling collections annually (current DPW draft measure)	419 missed collections (FY 2023)	Reduced missed collections by 7% (29) FY 2023	Reduce total missed collections by 5% annually	Progress made/staff responsible
Improve recycling rate by 5% annually (current DPW draft measure)	38.8% (2022 Annual Diversion Rate Report)	Data Capture In Progress	43.8% (FY 2024)	Progress made/staff responsible

The performance measures/KPIs outlined above are meant to demonstrate DPW progress to date related to performance tracking and reporting. As stated, these performance measures/KPIs are still in draft development and will be adjusted accordingly based on future stakeholder input and feedback before finalized and reported out on. Furthermore, any new performance measures/KPIs that are developed for service delivery assessment will also be shared with stakeholders prior to finalization. Furthermore, adjustments will also be made related to the availability of data and/or tracking systems available to DPW to capture and analyze the applicable data needed to develop and report out on performance.

3.0 Recommended Initiatives for P&R

This section includes detailed descriptions of each initiative, as well as trends and best practice considerations for P&R based on BerryDunn’s experience and research in developing the recommended initiatives contained in this report. This section also includes industry baseline and peer benchmarking data.

3.1 P&R Challenges, Opportunities, and Initiatives Identified

Based on information collected in Phases 1 and 2, BerryDunn developed a list of 18 challenges and opportunities. This list contains service delivery elements and practices BerryDunn identified as having the largest effect on overall performance of P&R. BerryDunn and the Town PMT created, reviewed, and identified six highest priority initiatives based on projected benefit to P&R. The initiatives and best practices included in Section 3.2 of this report were based on addressing these issues.

Table 3.1: P&R List of Challenges and Opportunities

Descriptions of Challenges and Opportunities	
No.	P&R Organizational and Management Environment
1	P&R’s management is regularly called upon to find ways to support maintenance and field operations due to maintenance staffs’ limited workload capacity.
2	P&R’s recreation coordinator and working lead person are regularly called upon to provide administrative support, assisting the P&R director with various tasks, as needed.
3	P&R does not use performance metrics, making it difficult to track progress, assess efficiency and effectiveness, or utilize a data-driven approach to justify future budget and resource needs.
4	P&R does not collect frequent or consistent data related to operations efficiency, effectiveness, or performance.
No.	P&R Operations
5	P&R’s maintenance responsibilities have increased in the past year (e.g., the opening of a new dog park) and are expected to continue increasing with the scheduled opening of the 114-acre Camp Shepard recreation facility in 2023 and the recently completed new splash pad at Deerfield Park.
6	P&R has limited programming personnel resources (one part-time resource) responsible for managing current program and service offerings, increasing service offerings, and conducting marketing, education, and outreach.
7	P&R offers limited age- or activity-specific programming. For example, there are no teen-specific activities, programs, or services currently being offered.
8	P&R does not have its own transportation (bus or van) to support recreation activities and programs.
9	P&R does not have a system to manage activity or program registration or track related metrics (registration, participant counts, fees, revenue, etc.).



Descriptions of Challenges and Opportunities	
10	P&R is not currently utilizing or tracking work orders or utilizing a work order management system.
11	P&R is not able to track and report on fuel consumed, materials used, and number of hours spent maintaining a site or providing a service due to the lack of a proper work order system.
No.	P&R Physical Environment
12	P&R reported a loss of operational and maintenance efficiency due to travel time from the maintenance garages to work sites.
13	P&R staff reported maintenance garages need significant repairs and upgrades.
14	P&R will need janitorial services once the new administrative recreation facility is opened.
No.	P&R Operating Budget and Management
16	P&R generates revenue from beach parking/use and fees for programs. Additional programming additions could provide for increased revenue-generating opportunities.
17	P&R does not generate revenue from field use permits.
No.	P&R Capital Improvement Budget and Management
18	P&R staff reported having to maintain old equipment that has exceeded its useful life rather than being allocated resources to purchase new equipment.

3.2 Initiatives

BerryDunn identified six initiatives for P&R to consider based on challenges and opportunities identified above. Summaries for these initiatives were shared with the Town PMT for review and input related to applicability and prioritization. Tables 3.2.1 – 3.2.6 contain summary descriptions and a priority for each initiative as well as full initiative detail. Each initiative has been prioritized based on the indicators contained in Figure 1.1.

3.2.1 Develop Consistent Age-Specific Programming

Table 3.2.1: Develop Consistent Age-Specific Programming

Develop Consistent Age-Specific Programming	
Initiative Summary	
	P&R staff noted the Town’s desire and need for additional age-specific programming, especially for teens. Recreation programming specific to teens can encourage healthy and productive development through outdoor exploration, the arts, and leadership activities. While the P&R recreation division has developed events geared toward teens, regular and consistent programming may provide additional community benefit. Consistent programming could include a rotation of quarterly or seasonal program offerings with regular session times. To support continued efforts related to this initiative, the P&R program coordinator developed and distributed a survey to approximately 740 students at Gallagher Middle School and Smithfield High School and received

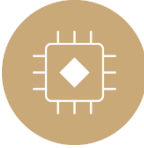


Develop Consistent Age-Specific Programming	
	<p>approximately 362 responses. The following data points are core components of respondents' answers.</p> <ul style="list-style-type: none"> - 74% of respondents currently participate in recreational/sports related extracurricular activities. - 67% of respondents participate in sports activities. - 27% of respondents participate in arts/dance/music activities. - 90% of respondents have access to transportation. <p>Additionally, respondents provided feedback related to types of activity and programming offerings they would like to see offered more in the future, though currently P&R offers activities and programming opportunities across many of these categories. The following list highlights the core categories identified.</p> <ul style="list-style-type: none"> - Sewing/Knitting/Cooking - Hiking/Camping/Outdoor - Self Defense - Film/Photography/Animation - Babysitter Safety/Home Safety/CPR and First Aid Training - Drama/Performing Arts/Music - Volunteer/Community Service Opportunities - Engineering/Robotics - Health and Wellness - Politics/Local Government <p>Additionally, current and anticipated P&R activity, program, and service offerings have been included as an attachment in Appendix C.</p>
Related Issue(s)	
<ul style="list-style-type: none"> • P&R could further support youth in the community who would benefit from enhanced healthy and productive development through recreation programming. • P&R could develop consistent programming, which would help to grow participation and eventually increase revenue generation. • P&R staff reported parents are looking for P&R to provide recurring teen activities, programs, and events. Doing so would help to fill a service gap in the community. 	
Action Items to Implement	
<ul style="list-style-type: none"> ☑ Task 1: Identify teen programs to develop. Complete a comprehensive needs analysis to identify current and future recreation needs through public engagement, surveys, demographics, benchmarking, and trends analysis. Use the youth survey results or conduct additional outreach to identify what topics and types of programs are of interest to the community. ☑ Task 2: Develop a funding strategy for program development and operational needs. Identify the appropriate resources needed to develop and deliver programs. This includes instructors, facility space, equipment, supplies, and staff to oversee registration and program management. 	



Develop Consistent Age-Specific Programming		
<p><input checked="" type="checkbox"/> Task 3: Develop program content, establish program days/times, and coordinate program logistics. Before marketing the program, outline content for the program, dates and times, facilities, instructor/program leads, and registration process.</p> <p><input checked="" type="checkbox"/> Task 4: Leverage Marketing and Social Media. Awareness of recreation services is critical to the success of any agency's programs. Promote the program through a variety of media platforms to encourage participation. In addition to the Town's recreation website, consider using social media, print media, email announcements to schools, and printed flyers to advertise the program and help ensure full participation.</p> <p><input checked="" type="checkbox"/> Task 5: Develop performance measures/KPIs to evaluate programs and services. This includes documentation of program structure, activities, and outcomes. Documentation should be maintained throughout the course of the program and updated at program completion. Staff should also collect feedback from both instructors/program leads and participants upon completion of the program to help guide P&R in determining whether to reoffer, discontinue, or modify the program.</p> <p><input checked="" type="checkbox"/> Task 6: Cultivate partnerships. Sustain positive relationships and high levels of collaboration between public, private, faith-based, civic, neighborhood, and community-based organizations and the community at large.</p>		
Anticipated Benefits		
	<ul style="list-style-type: none"> • P&R supports the development of youth in the Town, including exposure to outdoor activities, the arts, and leadership development. • P&R establishes a framework for building and evaluating recreation programming to further expand programs as the department expands. • P&R builds community by providing opportunities for teens to connect outside of the school environment and participate in community-based activities. • P&R begins offering additional revenue-generating recreation programming. 	
Risks		
<p>No Action</p> <ul style="list-style-type: none"> • Failure to initiate teen programming will not impact the services P&R currently provides; however, P&R will miss the opportunity to provide important community recreation services and growth opportunities for teens throughout the Town. 		
<p>During Implementation</p> <ul style="list-style-type: none"> • Monitor recreation trends that may affect P&R service offerings. Continue to engage the community in identifying priorities and future needs related to teen programming and overall recreation programming. Consider offering a few select activities, programs, and services initially, paying particular attention to funding and staffing needs. 		
Implementation Timeline		
<p>Priority</p>	<p>Discussions related to this initiative should start within six to nine months. Funding and resource discussions should align with the Town's budget development process. Any additional funding or resources approved for elements of this initiative would begin to be utilized in the first FY they are allocated.</p>	<p>Complexity</p>




Develop Consistent Age-Specific Programming	
Best Practice Considerations	
	<p>Local parks and recreation agencies are often tasked with finding opportunities for teen programming beyond youth sports. Activities such as meditation, yoga, sports, art, and civic engagement can help teens develop life skills and engage cognitive functions. Beyond interacting with those of their own age, many agencies are developing creative multigenerational activities that may involve older adults and teens assisting one another to learn life skills. Agencies that can help teens develop career development skills and continue their education are most successful in promoting positive teen outcomes and curbing at-risk behavior.⁸</p> <p>A national long-term study of more than 17,000 teens who frequented recreation facilities found 75% were more likely to engage in the highest category of moderate to strenuous physical exercise. Because these activities involve a considerable amount of effort, the benefits have been shown to include “reduced obesity, a diminished risk of disease, an enhanced immune system and most importantly, increased life expectancy.”⁹</p>

⁸ Kardys, Jack “Park Afterschool Programs: A Vital Community Resource” National Recreation and Park Association. June 2019, [Park Afterschool Programs: A Vital Community Resource | Perspectives | Parks and Recreation Magazine | NRPA](#)



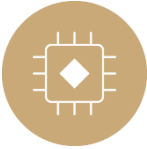
⁹ National Association of Community Health Centers, Inc. (2012, August). Powering Healthier Communities: November 2010 Community Health Centers Address the Social Determinants of Health.

3.2.2 Create a Full-Time Recreation Program Coordinator Position

Table 3.2.2: Create a Full-Time Recreation Program Coordinator Position

Create a Full-Time Recreation Program Coordinator Position	
Initiative Summary	
	<p>P&R recently hired a part-time (19 hours per week) recreation program coordinator. The current recreation program coordinator is responsible for developing events and programs, managing program registration and payments, and coordinating logistics for programs and events (including facilities, transportation, instructors, and materials). The recreation program coordinator has also engaged in outreach to the community to help identify what types of program and events the community would like to see offered. The Town’s desired expansion of recreation programming warrants a full-time staff person dedicated to developing, managing, and coordinating recreation programs and services. The expenses associated with approving and funding a full-time recreation coordinator position could be partially offset by activity and programming fees and charges revenue, once established.</p>
Related Issue(s)	
<ul style="list-style-type: none"> • P&R currently lacks sufficient personnel resources to significantly expand recreation programming directly offered by the Town. A full-time staff person may be needed to manage recreation operations, coordinate program/event logistics, respond to resident/customer inquiries, and conduct outreach to the community. • P&R does not currently have a sufficient recreation activity and program registration system. Since the time of this writing efforts to select and implement a recreation management system have commenced. See initiative 3.2.3. 	
Action Items to Implement	
<ul style="list-style-type: none"> ☑ Task 1: Begin discussions with the Town manager related to creating a full-time recreation coordinator position. Begin discussions with the Town manager to better understand the viability, need, and timing of funding a full-time recreation coordinator position. Discussions related to timing and funding must be determined prior to moving forward. ☑ Task 2: Revise the part-time recreation program coordinator job description to encompass full-time needs. Work with the HR department to review the position description and current responsibilities to identify where there is misalignment. Determine the appropriate responsibilities for the full-time role based on current needs, with consideration for anticipated growth of responsibilities related to the position as recreation program offering expand. ☑ Task 3: Begin recruitment to fill the full-time recreation coordinator position once funded. Work with the HR department to post the finalized job description to appropriate recruitment channels as well as posting the job internally and giving any qualified internal candidates the appropriate application channels and consideration. 	
Anticipated Benefits	
<ul style="list-style-type: none"> • P&R may benefit from having a full-time personnel resource to assist with overseeing part-time and voluntary recreational staff as well as planning, scheduling, marketing, and managing recreation activities. 	







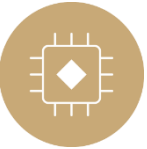
Create a Full-Time Recreation Program Coordinator Position	
	<ul style="list-style-type: none"> • P&R may benefit from having a full-time personnel resource to develop, plan, and promote expanded offerings related to special events, school-age programs, teen programs, older adult programs, youth and adult sports, facility rentals, contract classes, and other services. • P&R may benefit from additional personnel capacity, which will allow for greater engagement with the community to help ensure programming is meeting community needs.
Risks	
No Action	
<ul style="list-style-type: none"> • No action will limit P&R's capacity to expand recreation activity, programming, and service offerings. 	
During Implementation	
<ul style="list-style-type: none"> • Should the current recreation program coordinator role expand from part-time to full-time, P&R should establish clear and realistic expectations for the new position and goals for the Department's recreation programming. 	
Implementation Timeline	
<p>Priority</p> 	<p>Discussions related to this initiative should start in conjunction with funding and resource discussions that begin with the Town's budget development process, but should not be delayed greater than six months. Any additional funding or resources approved for elements of this initiative would begin to be utilized in the first FY they are allocated.</p>
<p>Complexity</p> 	
Best Practice Considerations	
	<p>A national survey highlighting the responsibilities of parks and recreation agencies found that 94% of agencies provide recreation programming and services directly. Average staffing levels at the typical parks and recreation agency providing services to a population of around 20,000 – 50,000 is 11.8 FTEs, with the lower quartile being 5.9 FTEs and the upper quartile being 19 FTEs. The average distribution of staff responsibilities across parks and recreation agencies shows that 45% of total staff counts are generally allocated to operations and maintenance activities, with 31% of agency staff counts related to recreation programming development and service delivery.¹⁰</p>

¹⁰ National Recreation and Park Association (NRPA) Agency Performance Review 2022 and NRPA Parks Metrics, 2022.

3.2.3 Implement a Recreation Management System

Table 3.2.3: Implement a Recreation Management System

Implement a Recreation Management System	
Initiative Summary	
	<p>P&R does not currently have an adequate recreation programming registration system to manage recreation activities, participant registration, scheduling, or fees and payments. As P&R looks to expand programming, there will be a need for a comprehensive registration system to manage and track programs. This system, once implemented, would also serve as a business analytics platform that houses data and provides visual insights to assist with reporting on key performance measures/KPIs.</p> <p>At the time of this writing, capacity to measure and evaluate recreation programming and services was limited. Furthermore, direct recreation programming offerings had just begun to be provided through the hiring of a part-time recreation programming coordinator. As a result of this initiative, P&R has since been given approval to review recreation management systems and technology. Based on research, interviews with similar agencies, and the needs identified within the P&R service environment, P&R has chosen CivicRec as the recreation management system to implement. The system is expected to be operational in September 2023.</p>
Related Issue(s)	
<ul style="list-style-type: none"> • P&R should develop a performance measure/KPI framework. Performance measures/KPIs should provide Town and P&R leadership, policymakers, and the public insight into overall recreation programming performance, participation levels, participant satisfaction, and costs. • P&R currently manages individual event and program registrations and associated fees utilizing spreadsheets and the online tool EventBrite. • P&R’s current process is time-consuming and limits the number of events and programs that staff can manage at one time. 	
Action Items to Implement	
<ul style="list-style-type: none"> ☑ Task 1: Identify P&R’s software system needs. This involves thoroughly understanding the current service environment and projecting any new services anticipated to be delivered as recreation program offerings grow. Furthermore, identifying what technical functions will be required of a new system will be essential to identify and select the appropriate system for P&R needs (e.g., activity management, volunteer management, invoice generation, payment processing, membership management, facility rentals, reporting capabilities, etc.). ☑ Task 2: Solicit information from vendors through an RFP/RFQ/RFI process. This process should provide vendors with the appropriate information regarding P&R’s project scope and system needs. ☑ Task 3: Review vendor information related to the Town’s system needs. Consideration should be given to how well the vendor’s product addresses P&R’s functionality requirements, how easy the system is to use for staff and customers, and the short- and long-term costs of implementing and maintaining the system. ☑ Task 4: Select a vendor and implement the system. P&R should work to ensure that all applicable Town departments (e.g., IT) are involved in the review and selection process to best 	

Implement a Recreation Management System		
<p>determine appropriate fit. All applicable staff should be sufficiently trained on system functionality before going live. Additionally, sufficient information should be provided to the public in advance of the system go-live date regarding changes to activity identification and registration processes.</p>		
Anticipated Benefits		
	<ul style="list-style-type: none"> • P&R may benefit from a management system that will allow staff to more easily and efficiently track and manage multiple activities, programs, and events and associated information related to enrollments and pricing. • P&R may benefit from a management system that allows staff to track key performance measures/KPIs to help evaluate performance and monitor success of programs. • P&R may benefit from a management system that will greatly reduce staff workload related to activity and program scheduling, fee development, processing payments, and tracking registrations. 	
Risks		
<p>No Action</p> <ul style="list-style-type: none"> • No action will limit P&R's ability to efficiently expand recreation programming due to the staff capacity needed to manually manage program and event details using the current processes. 		
<p>During Implementation</p> <ul style="list-style-type: none"> • P&R should consider how staff and the public will use the system for tracking resources, registrations, making payments, and scheduling. It should also work to ensure that users have the appropriate training and guidance to successfully navigate the system and utilize it efficiently and effectively. 		
Implementation Timeline		
<p>Priority</p> 	<p>This initiative should begin immediately with completion targeted within 12 months. This would allow the recreation coordinator the opportunity to help lead and weigh in on specific elements and functionality of a new recreation management system. Discussions related to funding this initiative should start in conjunction with funding and resource discussions that begin with the Town's budget development process.</p>	<p>Complexity</p> 
Best Practice Considerations/Examples		
	<p>Generally, when parks and recreation agencies set out to identify and implement the appropriate recreation management software/system, this general approach is followed: The agency/department will conduct (usually with the assistance of applicable consulting support) a gap analysis, develop a plan of action, create an RFP, evaluate, and select vendor proposals, and select the appropriate vendor software.</p> <p>A gap analysis will identify deficiencies within the current systems that can be enhanced with new recreation management software and identify opportunities for improved system design and efficiency. The RFP will outline specific requirements of the agency and specific functional and technical requirements the system must have to satisfy the</p>	






Implement a Recreation Management System	
	needs of the agency/department. Evaluation and selection of a vendor or product can then begin.

3.2.4 Establish Pricing for Recreation Programs

Table 3.2.4: Establish Pricing for Recreation Programs

Establish Pricing for Recreation Programs	
Initiative Summary	
	<p>P&R staff reported differences of opinion related to the practice of charging a fee to participate in recreation activities and programs. Currently, P&R does not directly provide any revenue-generating recreation activities or programs independently. Establishing a price for an activity, program, or service will help to offset P&R’s cost to provide the activity, program, or service and will help create a relatively consistent revenue stream for some services. Establishing a price for a program or service can be done through a variety of strategies. Arbitrary pricing is not encouraged because it is difficult to justify. Following a cost recovery pricing approach is a best practice.</p>
Related Issue(s)	
<ul style="list-style-type: none"> • P&R should demonstrate the importance of charging fees for some activities, programs, and services. The Town collects taxes to satisfy its general revenue requirements. The level of service funded from tax levies is determined by the local jurisdiction and generally benefits all Town residents, which is different from fees collected for providing specific services to nonresidents, services benefitting smaller groups, or services benefitting only individuals. Fees paid relieve residents of the burden of paying for discretionary services they do not use. • As P&R programming expands, it will be necessary to establish fees for certain types of activities, programs, services, and/or field and open space usage to help cover the cost of operations and maintenance. 	
Action Items to Implement	
<ul style="list-style-type: none"> ☑ Task 1: Determine the full cost to provide the activity, program, or service. Knowing the full cost (e.g., personnel expense, non-personnel expense, service and supply expense, applicable indirect expenses) to provide activities, programs, and services for which a fee or charge is to be assessed is essential. This creates the foundation upon which decisions can be made regarding the percentage of costs to be recovered by way of user fees and charges. ☑ Task 2: Create sufficient accounting mechanism(s) to account for revenues and expenses related to activities, programs, and services provided. Work with Town executive management and the finance director to develop the appropriate accounting features and practices to account for the revenue generated by recreation programming services. ☑ Task 3: Develop mechanisms to assist those who wish to participate but cannot afford to do so. Developing a financial aid or scholarship program or fund will be necessary to assist those who cannot pay a portion of, or the full fee, required to participate. Generally, these funds are set aside and allocated to qualifying participants based on a set of established criteria. ☑ Task 4: Assess fee levels annually during the budget development process. P&R should undertake a basic cost-of-service analysis annually and conduct a formal fee study every two to 	

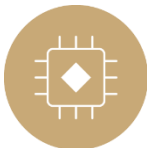


Establish Pricing for Recreation Programs		
<p>three years; it should also conduct this type of analysis when the Town experiences a significant change in demand for services, organizational structure, or key business processes, or when it identifies budgetary issues. As an ongoing practice, P&R is encouraged to adjust and update fees using detailed data and information as it becomes available, especially data collected via P&R's electronic registration and permitting system once implemented.</p>		
Anticipated Benefits		
	<ul style="list-style-type: none"> • P&R may realize increased revenue generation from fees and charges assessed, which can be used to offset a portion of the cost to provide select activities, programs, and services. • P&R could use revenue generated from user fees and charges to expand current programming or to develop and offer new programming. 	
Risks		
<p>No Action</p> <ul style="list-style-type: none"> • No action will result in no additional revenue generated to help offset the cost of providing activities, programs, and services, which might place additional strain on P&R's operating budget. • No action will potentially result in residents indirectly paying for activities, programs, and services they do not utilize nor experience any benefits from. 		
<p>During Implementation</p> <ul style="list-style-type: none"> • In establishing a pricing program, P&R should consider other factors besides revenue generation, such as the overall impact or benefit a program offers, and, therefore, the Town may choose to subsidize one program more than others, relative to the cost of service. 		
Implementation Timeline		
<p>Priority</p> 	<p>Discussions related to this initiative should start in conjunction with recreation activity and programming development. Funding and resource discussions should align with the Town's budget development process. Any additional funding or resources approved for elements of this initiative would begin to be utilized in the first FY they are allocated.</p>	<p>Complexity</p> 



Establish Pricing for Recreation Programs

Best Practice Considerations/Examples



A national survey of agencies serving populations of around 20,000 residents found that, on average, 30 fee-based recreation programs are offered annually.¹¹ Establishing a price for a program can be done through a variety of strategies. Arbitrary pricing is not encouraged, as it is difficult to justify and does not articulate use of tax subsidies in a way that ties to a department’s organizational or community mission. Best practices are for departments to follow a cost recovery pricing approach based on cost recovery goals within cost recovery goal percentage ranges. This method uses cost recovery goals as a primary pricing strategy, followed by either market pricing (for services with low alternative coverage, i.e., few if any alternative providers) or competitive pricing (for services with high alternative coverage, i.e., other alternative providers offer similar services).

The following are common pricing factors the departments consider when developing fees and charges for recreation activities and programs:

- Cost to offer the program (limited direct costs only)
- History of fees charged
- Perceived ability and willingness to pay
- Number of participants per class/activity
- Affordability for target audience
- Ability to attract participants
- Consider price breaks.

Other strategies to consider include:

- **Market Pricing:** A fee based on service or facility demand or what the department estimates a participant is willing to pay for a service. Private-sector businesses commonly use this strategy. One consideration for establishing a market rate fee is determined by identifying all similar providers (e.g., private-sector providers, municipalities, nonprofit providers) and, if it is determined that the service has an excellent position in the market, establishing a fee that is higher than other similar providers.
- **Competitive Pricing:** A fee based on what similar service providers are charging. One consideration for establishing a competitive fee is determined by identifying all providers of an identical service (e.g., private-sector providers, municipalities, nonprofit providers) and establishing a fee that is at midpoint or lower.
- **Differential Pricing:** A fee that is grounded in the idea that different prices are charged for the same service when there is no real difference in the cost of providing the service. The same service might be offered at a more desirable time or location, or have other factors that attract a following, which may drive a higher price

¹¹ National Recreation and Park Association (NRPA) Agency Performance Review 2022 and NRPA Parks Metrics, 2022.






Establish Pricing for Recreation Programs	
	<p>point. Alternatively, there might be services offered that are struggling to maintain a minimum and need a boost to stimulate more interest, driving a lower initial cost.</p> <ul style="list-style-type: none"> Nonresident Pricing: Many agencies use some form of nonresident surcharge pricing. Nonresident pricing is used to offset activity, program, and service tax dollar support to manage enrollments or demand or to allow residential priority. Many departments consider developing a nonresident pricing policy to outline activities and services to which nonresident pricing applies and to establish a consistent methodology for calculating nonresident price levels.

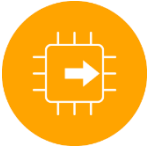
3.2.5 Develop a Cost Recovery Policy for Establishing Fees

Table 3.2.5: Develop a Cost Recovery Policy for Establishing Fees

Develop a Cost Recovery Policy for Establishing Fees	
Initiative Summary	
	<p>P&R does not currently have a formal policy governing fees and charges for recreation activities, programs, or services. As programming expands, P&R should consider developing a cost recovery policy that establishes a guideline for setting fees and systematic resource allocation. A cost recovery policy embodies a decision to generate revenues by charging fees for programs and services in relation to the total operational costs to provide them. In most cases, undertaking cost recovery as part of business practice does not imply that the goal is 100% recovery of the cost; however, a target cost recovery goal is established according to a variety of organizational and community values. Typical cost recovery goals may range from 0% to more than 100% of costs and are often associated with a community's service delivery mission and values. Many organizations choose to adopt conventional industry benchmarks, but it is generally not the most effective way to establish cost recovery goals. Given that each community's economic conditions and communal makeup are vastly different, benchmarking solely against other communities can create inaccurate comparisons.</p>
Related Issue(s)	
	<ul style="list-style-type: none"> P&R may need to generate additional funding to support staffing, operations, maintenance, equipment, materials, and transportation related to recreation programming in order to expand recreation programming and services as desired. P&R may need to adopt a cost recovery framework to create a mechanism that demonstrates greater accountability for spending and encourages efficiency. By creating fiscal policy that aligns with fiscal reality, the P&R will be more likely to be financially resilient in the long term.
Action Items to Implement	
	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Task 1: Create an inventory of current and future activity, programming, and service offerings and group all services according to similar criteria. For example, activities, programs, and services can be grouped together based on age range served, activity or program type, season in which they are offered, or general benefits provided. <input checked="" type="checkbox"/> Task 2: Determine revenue goals and conduct a cost-of-service assessment to determine the full cost of providing each activity, program, or service. Consider both direct staff,


Develop a Cost Recovery Policy for Establishing Fees		
<p>materials, and equipment needed to provide the activity/program/service and indirect townwide operational support staff in determining the full cost of providing services.</p> <p>☑ Task 3: Establish appropriate cost recovery percentages for each activity, program, and service category and incorporate into a cost recovery percentage policy. This policy will guide staff in setting and adjusting fee levels consistently on an annual basis in alignment with desired cost recovery levels and revenue requirements. In addition, programs and services should be assessed individually with consideration for the overall benefit of the program/service to the community and participants' ability to pay.</p> <p>☑ Task 4: Evaluate fees and charges regularly in alignment with the established cost recovery percentage policy. P&R staff should also carefully monitor local indicators related to activity, program, and service demand and trends. Staff should track the number of participants registered, permits issued, and facilities booked for the most common services provided and assess fee adjustments for those specific services on an FY basis to determine the level of impact any adjustments might have on revenue generation and to offset applicable costs.</p>		
Anticipated Benefits		
	<ul style="list-style-type: none"> • P&R may benefit from a cost recovery policy that could be used as a guideline for setting fees and systematic resource allocation. • P&R could utilize a cost recovery policy that can provide guidance to staff and management for prioritizing core program areas, setting fees and charges, identifying tax subsidy levels, and allocating resources effectively. 	
Risks		
<p>No Action</p> <ul style="list-style-type: none"> • No action may limit P&R's ability to articulate use of tax dollars and to justify the establishment and fees and charges for certain types of recreation activities and programming. 		
<p>During Implementation</p> <ul style="list-style-type: none"> • P&R should identify core revenue and expense elements to consistently track in order to become familiar with key revenue and expense elements to consider when calculating cost recovery levels. 		
Implementation Timeline		
<p>Priority</p> 	<p>Discussions related to this initiative should start in conjunction with recreation activity and programming development. Cost recovery target establishment and funding and resource discussions should align with the Town's budget development process.</p>	<p>Complexity</p> 
Best Practice Considerations		



Develop a Cost Recovery Policy for Establishing Fees	
	<p>An agency built upon sound business principles requires the adoption of defensible financial management policy and continuously justifying how tax dollars are spent and invested. Adopting a methodology encourages productivity and the pursuit of opportunities for efficiency and revenue growth, knowing that these efforts can help strengthen systems for the long term. In many agencies across the country, activities are subsidized to greater and lesser levels based on priorities directly or indirectly identified by the codifying body. For example, activities for youth, teens, and older adults have been traditionally subsidized to a greater level than adult activities. Services targeted to residents with low incomes have traditionally been subsidized to a greater level than those targeted to residents with higher incomes.</p> <p>Using similar service category groupings will also allow staff to forecast the revenue potential at specific fee levels and assess the subsidy levels for each program and service to better reflect the mission of the agency and community values.</p> <p>Establishing a cost recovery policy and implementing the practice into routine fiscal exercises can provide P&R with several opportunities to improve service delivery and align fees with the mission and priorities of the community as a whole. Establishing a formal cost recovery policy might help:</p> <ul style="list-style-type: none"> • Enhance accuracy in identifying the cost of providing each service • Identify and categorize both direct and indirect costs • Define the amount of subsidy allocated to each service • Establish a basis of fees and rationale for the pricing structure • Demonstrate consistency, structure, and uniformity throughout the fee schedule • Promote transparency for the public, stakeholders, and staff • Justify future price increases <p>A sample of possible subsidy levels for specific service and program groupings has been included for reference and/or consideration in Appendix B.</p>

3.2.6 Reorganization of the Parks and Recreation Department

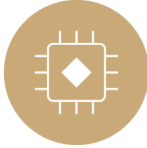
Table 3.2.6: Reorganization of the Parks and Recreation Department

Reorganization of the Parks and Recreation Department	
Initiative Summary	
	<p>When the circumstances are applicable, many towns and cities choose to explore the feasibility to reorganize the management and service delivery structure of parks and recreation departments. A common approach often taken is to combine the recreation services function with a similar community service function within the organization. The idea being that efficiencies can be realized and redundancies in service delivery eliminated due to the similarity of services provided. Furthermore, by combining parks maintenance operations with existing maintenance operations usually within a public works department efficiencies can also be realized. Specific to the Town, all other major maintenance functions (streets, fleet, utilities, etc.) are currently located at the Town's public works corporation yard on Spragueville Road. The close physical proximity of the</p>

Reorganization of the Parks and Recreation Department	
	<p>service and maintenance functions allow for the sharing of equipment, materials, supplies, and personnel resources which naturally create operational efficiencies. Moreover, should parks maintenance functions be reorganized under the umbrella of DPW, it is likely that this maintenance function would also realize operational efficiencies as well. Furthermore, in addition to maintenance function and service delivery efficiencies that are often realized when completing similar reorganizations, there is often opportunities to reorganize or “flatten” executive management and supervisory structures to allow for a streamlining of management oversight, efficiencies, and ultimately cost savings.</p>
Related Issue(s)	
<ul style="list-style-type: none"> • The DPW’s current equipment and fleet storage areas are nearing or are at capacity. This may present challenges should P&R need to move equipment, materials, and supplies to the DPW Spragueville Road site. • The DPW is limited in its ability to expand its physical footprint to accommodate additional administrative and maintenance functions at the Spragueville Road site due to its location near a wetland area. • The Town’s current personnel capacity may be limited to support a reorganization of recreation services to another department and may be limited in its ability to provide administrative oversight for recreation services delivery. • The Town currently issues permits for fields and open space through the parks maintenance function. This service delivery model may have to change should the parks maintenance function be reorganized under the umbrella of the DPW. • The Town’s current neighborhood and senior programming and services are provided through different outlets within the current P&R organizational layout. 	
Action Items to Implement	
<ul style="list-style-type: none"> ☑ Task 1: Create a working group of internal and external stakeholders. To better assess the pros and cons and potential service delivery disruptions or impacts to the community a working group should be established to begin documenting impacts and mitigation strategies should the reorganization be implemented. ☑ Task 2: Develop draft organization charts for the DPW and newly created department. Develop organizational charts accurately depicting the organization of the DPW reflective of the parks maintenance function being added and a new organization chart reflective of recreation services being combined with another applicable service function. Furthermore, a new department name should be established for recreation and existing functions coming together. ☑ Task 3: Establish core services to be provided by recreation and existing service functions. Often, other town/city departments provide similar activities, programs, and services as those delivered by traditional recreation functions. Therefore, to eliminate redundancy and overlap a detailed offering of services should be created and inventoried to outline which service function will provide certain types of core services to the community. ☑ Task 4: Work with HR and department management to develop an approach to communicating changes to staff. Staff and stakeholders’ willingness to adopt new processes and structures plays a significant role in the success—or failure—of department reorganization efforts. Management should begin early to develop a communications plan that considers the 	



Reorganization of the Parks and Recreation Department		
<p>needs of each staff and stakeholder group. Management should also engage staff and stakeholders early on to build and understanding of why the changes are being implemented and help them understand how their work may, or may not, change in the future environment.</p> <p>☑ Task 5: Evaluate cost savings and other efficiencies. Town management should share projected cost savings and efficiencies with boards, commissions, and the Town Council to help ensure buy-in and support for the reorganization initiatives.</p>		
Anticipated Benefits		
	<ul style="list-style-type: none"> The Town may benefit from combining core maintenance functions in a similar physical service area and under a single management structure in the form of cost savings and service delivery efficiencies realized. The Town may benefit from combining recreation and similar service functions. This may allow for the elimination of duplicative service delivery and allowing for a core focus to be developed on delivering neighborhood and community focused services. The Town may benefit from a streamlining of its organizational structure. A reorganization of this type may prevent the need for additional executive management positions to be added and may reduce the level of oversight the Town Manager's office may have to provide on an annual basis. 	
Risks		
<p>No Action</p> <ul style="list-style-type: none"> No action may limit P&R's ability to realize operational efficiencies and enhance core recreation focused service delivery. No action may limit P&R's ability to realize operational and service delivery efficiencies related to core parks maintenance service functions. No action may limit the Town's ability to realize cost savings. 		
<p>During Implementation</p> <ul style="list-style-type: none"> Staff and stakeholders from both the DPW and P&R should be kept abreast of all impending changes as well as be sought out frequently for insight and feedback related to the core service delivery functions they are involved in day-to-day. 		
Implementation Timeline		
<p>Priority</p>	<p>Discussions related to this initiative should start in conjunction with a FY start in order to give sufficient time to have reorganization elements in place for a following FY start. Once the initiative has been confirmed to begin, ideally the merging of the recreation service delivery component should begin first, within the first three months of the FY. Over the next four to six months the parks maintenance function should be merged with the DPW. Finally, throughout the final three to four months of the FY all organizational merging should be completed and the new department should be established and functioning under its new department name.</p>	<p>Complexity</p>

Reorganization of the Parks and Recreation Department	
Best Practice Considerations ¹²	
	<p>The City of Newburyport, MA recently completed a restructuring of its Parks and Recreation Department. Main goals of the restructuring effort we established and related to continuing to provide the highest quality services to the community, maintain the excellent financial health of the City, and realize and maximize efficiencies related to the City’s administration and organization. The foundation of this restructuring effort is very similar to what would benefit the Town.</p> <p>To identify and utilize general best practices, the City surveyed a number of similar communities that had recently completed similar restructuring efforts. Best practices included:</p> <ul style="list-style-type: none"> • Develop a plan to guide the reorganization process. • Include relevant boards, commissions, and councils in the planning process. • Include staff and stakeholders in the development of the plan and include their feedback when developing the proposed structure of the departments. • Identify and frequently share the anticipated benefits resultant from the restructuring. • Identify and changes or updates that will need to be made to local codes or ordinances. • Ensure staff are aware of proposed changes and frequently communicate with them regarding their role, and how it may or may not change, in the newly organized environment. <p>In addition to reducing duplication in administration and service delivery, staff at all levels of the new organization are able to work much more collaboratively. Opportunities have been identified across the departments to implement better ways to serve the public with the resources currently available. One example of improved service includes better access to recreation facilities and classes through coordination by staff at library facilities. Another example is sharing of expertise from one division to another, such as children’s programming and technology related services.</p>

3.3 Summary of Primary P&R Strengths and Continued Support

This performance assessment analysis focused on identifying opportunities to improve business processes, business systems, staffing structures, and overall service delivery; however, current P&R strengths were observed during BerryDunn’s analysis and fact-finding sessions with staff and stakeholders. The six primary initiatives identified above are designed to continue to enhance and develop the three primary strengths summarized below. However, without dedicated resources and support, P&R may be challenged to realize the full implementation of all of the initiatives outlined and therefore may not realize the full benefit projected. Additional,

¹² Newburyport Parks Reorganization Plan 2022, <www.cityofnewburyport.com>, Accessed May, 2023



personnel and non-personnel, resources may allow for initiatives to be completed in a timelier manner and will allow P&R to continue to leverage its primary strengths identified below.

Table 3.3.1: Summary of Primary P&R Strengths

Core Strengths and Continued Support		
Commitment to Expansion of Recreational Offerings	Current Strength	P&R, despite the lack of full-time recreation personnel, does facilitate and manage various private providers who offer tennis, softball, basketball, and pickleball activities and programs. P&R also partners with the Smithfield YMCA to offer a summer recreation camp.
	Continued Support	In order to continue expanding recreational opportunities and events for Town residents, P&R will need to be allocated adequate personnel and non-personnel resources dedicated specifically to recreational programming and activities.
	Benefits Projected	As outlined in initiative 3.2.1 above, adding additional recreational staff resources to support the development of a greater variety of programs and activities will help to expand recreational programming offerings, especially those activities and programs specifically offered for teens.
Dedicated, Cohesive Staff	Current Strength	P&R leadership and staff demonstrated a commitment to working together and helping each other out. P&R staff are caring, passionate individuals who work very hard, collaborate, and have a deep commitment to the work they do, to each other, and to the community.
	Continued Support	P&R leadership will need sufficient resources, both personnel and non-personnel, as it continues to demonstrate how varying levels of resources translate into varying levels of service, and communicating which scenarios will yield the greatest results and intended outcomes for the community.
	Benefits Projected	As outlined across multiple initiatives above, the benefits of continuing to support P&R leadership with efforts related to expanding recreational activities and programming will continue to yield benefits and value for the community.



Core Strengths and Continued Support		
Efficient and Effective Maintenance Operations	Current Strength	P&R staff demonstrated an effective approach to parks, trails, and open space management and maintenance as well as in-house repair and maintenance of most P&R equipment and machinery. Additionally, staff regularly provide field permitting and field scheduling services in addition to park and open space maintenance services.
	Continued Support	P&R will need sufficient personnel resources to continue to provide the highest level of service possible to the community while also having adequate physical workspaces to store materials, equipment, and machinery.
	Benefits Projected	As outlined across multiple initiatives above, having adequate maintenance and repair resources will not only allow for quality delivery of recreational services within facilities and across all Town parks and open space, but will also allow for increased operational and maintenance efficacy and provide value to the community.

3.4 P&R Benchmarking and Peer Comparisons for Select Local Government Jurisdictions

Peer comparisons can provide useful insights into how P&R compares with other similar parks and recreation operations. The community P&R serves is diverse across demographic, community, economic, and geographic characteristics. That said, the selection of peers for comparison attempts to reflect—as closely as possible—the unique elements found throughout the Smithfield community and the P&R service delivery framework.

Comparing one community to another to analyze operation frameworks and resources levels should never be the sole criteria in determining if there is an excess or deficiency in level of resources or how efficiently and effectively services are being delivered. This is because many factors cannot be known by simply accessing publicly available data with regard to how other agencies identify and allocate resources for municipal service delivery, what community priorities are, how service delivery is organized throughout the agency, or what specific community characteristics a municipality must contend with. However, if carefully analyzed peer comparisons can provide one option for benchmarking how cost effectively services are being delivered but provide limited usefulness for assessing service delivery performance. To that end, BerryDunn and the Smithfield PMT identified similar community and service delivery characteristics from the following peers: Belmont, MA; Cumberland, RI; Lincoln, RI; Stoneham, MA; and Bloomfield, CT. Rhode Island peers were selected based on proximity to Smithfield, population size, jurisdiction size, socioeconomic similarities, general fund operating budget levels, and parks and recreation operating budget levels. Furthermore, Rhode Island peers were also selected due to the similarities in levels of recreation services delivered. Massachusetts peers were chosen because of similar criteria; however, these peers were selected mainly based on service delivery frameworks that are similar in process to Smithfield P&R operations,

specifically Stoneham, MA with its similar offering of recreation services. Belmont, MA was selected as an example of an “aspirational” peer in that the agency offers a wide variety of recreation services in-house and provides an example of the level of resources needed to do so. Belmont, MA also demonstrates industry best practices in recreation service delivery despite the differences in financial and personnel resource levels.

The table below highlights core socioeconomic characteristics and fiscal data of peers identified for select core operational and service delivery component comparisons.

Table 3.4.1: Population and Socioeconomic Metrics¹³

Population and Socioeconomic Data						
	Belmont, MA	Cumberland, RI	Lincoln, RI	Stoneham, MA	Bloomfield, CT	Smithfield, RI
Population	27,295	36,434	22,499	23,244	21,301	22,118
Jurisdiction (sq. mi.)	4.65	26.49	18.07	6.02	26.40	26.23
Population Density (sq. mi.)	5,872	1,374	1,246	3,864	753	843
Median Household Income	\$151,502	\$104,613	\$94,571	\$105,541	\$84,735	\$87,819
Operating Budget - General Fund – (\$000)¹⁴	\$77,537	\$34,826	\$26,302	\$32,038	\$46,169	\$38,236

Table 3.4.2: P&R Operating and Capital Budget Metrics¹⁵

Operating and Capital Budget						
	Belmont, MA	Cumberland, RI	Lincoln, RI	Stoneham, MA	Bloomfield, CT	Smithfield, RI
P&R Budget (\$000)	\$1,923	\$565	\$514	\$143	\$998	\$887

¹³ United States Census Data 2020, <www.census.gov>

¹⁴ Belmont, MA Proposed Budget FY 2023, <www.belmont-ma.gov>, Cumberland, RI, Proposed Budget FY 2023, <www.cumberlandri.org>, Lincoln, RI, Approved Budget FY 2023, <www.lincolnri.gov>, Stoneham, MA Proposed Budget FY 2023, <www.stoneham-ma.gov>, Bloomfield, CT, Adopted Budget FY 2023, <www.bloomfieldct.gov>, Smithfield, RI, Adopted FY 2023 Budget, www.smithfieldri.com

¹⁵ Ibid.



Operating and Capital Budget						
	Belmont, MA	Cumberland, RI	Lincoln, RI	Stoneham, MA	Bloomfield, CT	Smithfield, RI
P&R Budget % of General Fund	2.5%	1.6%	2.0%	0.4%	2.2%	2.3%
P&R Expenditures per Resident	\$70.46	\$15.52	\$22.86	\$6.15	\$46.87	\$40.09
Average P&R Expenditure per Resident	Average Across Peers: \$32.37 New England Average: \$71.00 ¹⁶ National Average: \$93.01 ¹⁷					
P&R Total FTEs	9.5	4	3	2.5	4	4
P&R FTEs per 1,000 Residents	0.35	0.11	0.13	0.11	0.19	0.18
Average P&R FTEs	Average Across Peers: 0.18 New England Average: 0.89 ¹⁸					

¹⁶ National Recreation and Park Association (NRPA) Agency Performance Review 2022 and NRPA Parks Metrics, 2022.

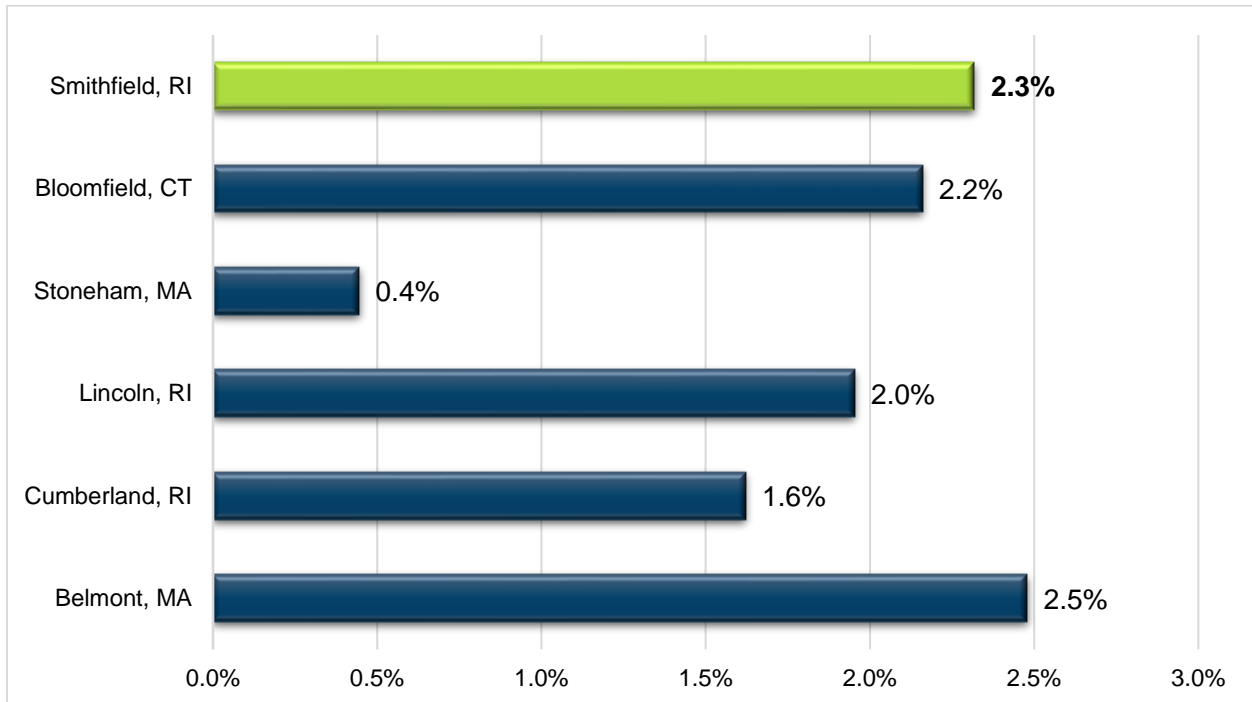
¹⁷ Ibid.

¹⁸ Ibid.



BerryDunn reviewed available FY 2023 budget information across peer cities and towns related to agencies' general fund operating resources and the percentage allocated to parks and recreations operations. The budget data show that the highest projected allocation to parks and recreation operations was found in Belmont, MA. The lowest projected allocation was found in Stoneham, MA. The average projected allocation to parks and recreation operations for FY 2023 across all peer agencies analyzed is 1.7%, which is 0.5% lower than Smithfield.

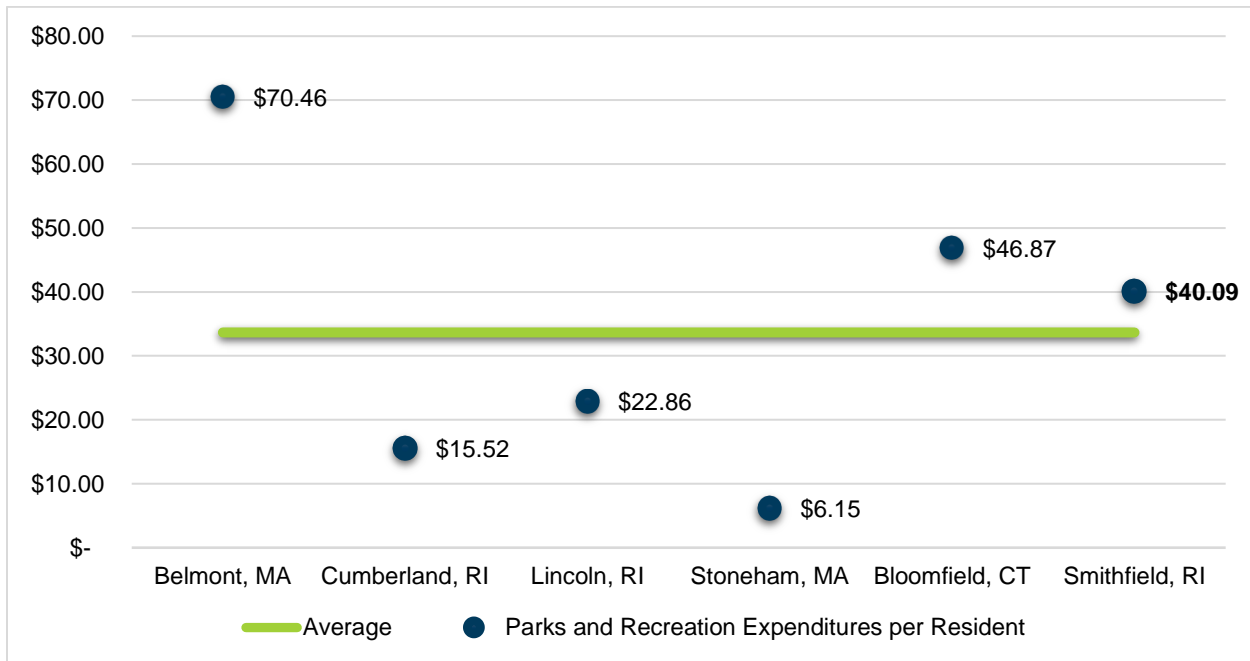
Figure 3.4.1: Parks and Recreation Percentage of General Fund Expenditures





BerryDunn reviewed available FY 2023 budget information across peer cities and towns related to agencies' general fund spend per resident related to parks and recreation operations. The budget data show that the highest projected spend per resident was in Belmont, MA. The lowest projected spend per resident was in Stoneham, MA. The average projected spend per resident for FY 2023 across all peer agencies analyzed is \$33.66, about 16.0% lower than the projected spend per resident in Smithfield. The average spend per resident in Belmont, MA, reflects expenditures for an agency that provides substantial recreation programming services. Cumberland, RI; Lincoln, RI; Stoneham, MA; and Bloomfield, CT, average spend per resident reflects the amount for agencies that provide similar levels of direct recreation programming services to Smithfield P&R.

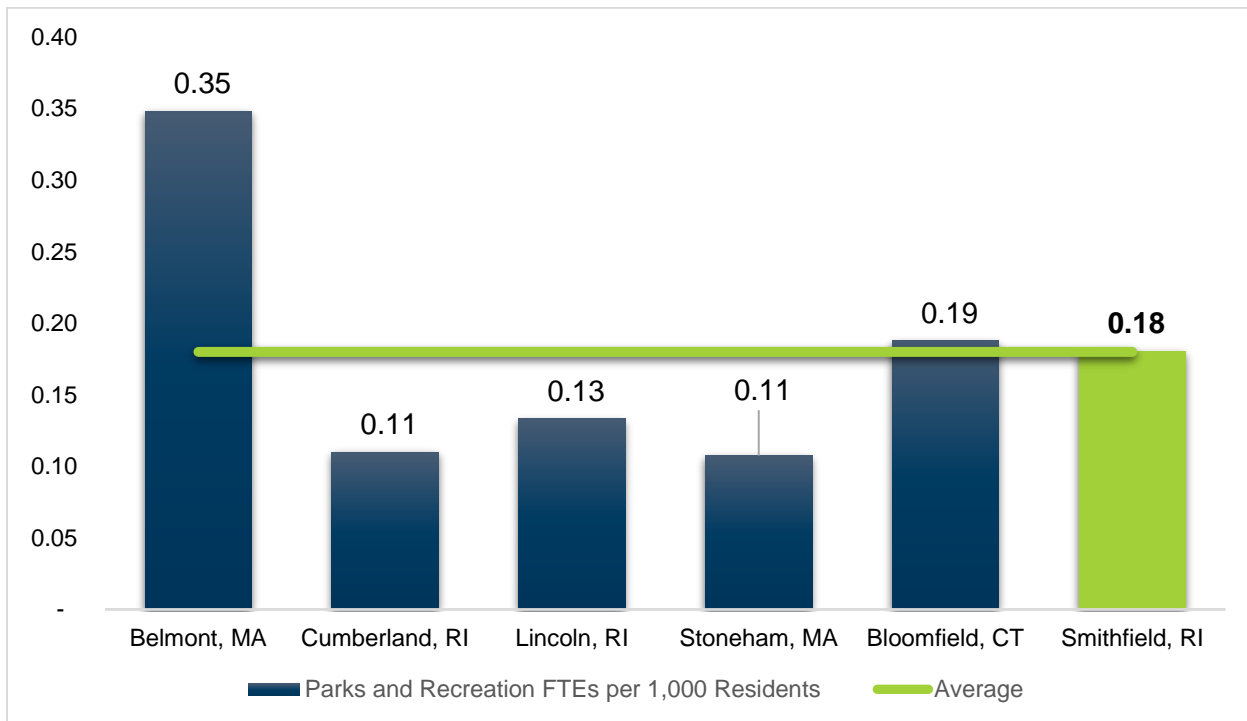
Figure 3.4.2: Parks and Recreation Expenditures per Resident





To assess workload levels across peer agencies in comparison to available personnel resources allocated to Smithfield parks and recreation operations, BerryDunn calculated funded FTE staffing resources available per 1,000 residents as well as available FTE resources per 1,000 residents across peers. The budget data show that the highest number of available parks and recreation FTE resources was in Belmont, MA. The lowest number of available parks and recreation FTE resources was in Cumberland, RI and Stoneham, MA. The average number of available FTE resources across peer parks and recreation operations is 0.18 FTE per 1,000 residents, equal to the projected FTE level per 1,000 residents in Smithfield. The levels of FTE resources per 1,000 residents in Belmont, MA, reflect expenditures for an agency that provides substantial recreation programming services. Cumberland, RI; Lincoln, RI; Stoneham, MA; and Bloomfield, CT, FTE resources per 1,000 residents reflect the personnel resource amount for agencies that do not provide significant, direct recreation programming services. Furthermore, Belmont, MA and Stoneham, MA are agencies that organize the parks maintenance function under public works. Using publicly available data, the FTEs for the parks maintenance function were extracted from the public works rosters and included in the calculations below.

Figure 3.4.3: Parks and Recreation FTEs per 1,000 Residents



3.5 P&R Benchmarking and Baseline Data for Peer Agencies Throughout New England

An area of emerging emphasis for the P&R is a department-wide approach and system for performance management and benchmarking practices to support the P&R’s operational efficiency and transparency efforts. To date, P&R has not developed a draft list of performance measures/KPIs to be monitored, published, and reported on. Nationally, more and more



agencies have developed robust performance management and benchmarking frameworks to continuously assess service delivery efficiency and effectiveness.

There are opportunities for the P&R to develop its performance measure/KPIs inventory (see Appendix D). Also, there are opportunities for improvement related to communications to staff about what is involved in consistent performance analysis and how rigorous measures of organizational performance is essential to P&R’s overall success.

BerryDunn has provided examples of common performance measures/KPIs and benchmarking targets that tie directly to P&R’s core areas of service below in Table 3.5. While this performance data is not yet published, P&R could utilize these common performance measures/KPIs and benchmarking targets as a starting point to begin collecting and analyzing the data associated with the categories below.

Since P&R does not currently track or report on any performance measures/KPIs, the table below includes New England data for benchmarking purposes should P&R wish to compare itself to the aggregate of similar geographically located parks and recreation agencies in the future. Furthermore, since there is no available data currently to benchmark against local and/or regional peers the table below includes general information about which services P&R current provides, but does not track data for, which services it plans to provide in the future, and which services warrant further discussions with Town leadership.

Yes: this is a service or practice currently offered/performed by P&R.

Future: this is a service P&R plans to provide in the future.

TBD: this is a service or practice that warrants further discussion with Town leadership as to the applicability and level of service to be provided, if desired.

Table 3.5: P&R Benchmarking and Baseline Data for Peer Agencies Throughout New England

Parks and Recreation Responsibilities			
Category/Description	Smithfield, RI	New England ¹⁹	Notes
Percentage of agencies that operate and/or maintain park sites or open space	Yes	100%	Yes, indicates service is currently provided
Percentage of agencies that operate and/or maintain indoor recreation facilities	Future	88.9%	Future indicates service will be provided in the near-term

¹⁹ National Recreation and Park Association (NRPA) Agency Performance Review 2022 and NRPA Parks Metrics, 2022.

Percentage of agencies that operate and/or maintain non-park sites (i.e., dog park)	Yes	44.4%	Yes, indicates service is currently provided
Percentage of agencies that operate and/or maintain trails and greenways	Yes	89.1%	Yes, indicates service is currently provided
Percentage of agencies that provide direct recreation programming and services	Future	88.9%	Yes, indicates service is currently provided
Parks and Recreation Activities and Services			
Category/Description	Smithfield, RI	New England	Notes
Percentage of agencies that offer summer camp programs and services	TBD	100%	TBD indicates that service will be considered after further discussion
Percentage of agencies that offer before-school services	TBD	12.5%	TBD indicates that service will be considered after further discussion
Percentage of agencies that offer after-school services	TBD	66.7%	TBD indicates that service will be considered after further discussion
Percentage of agencies that offer preschool services	TBD	44.4%	TBD indicates that service will be considered after further discussion
Percentage of agencies that offer teen-specific activities and services	Future	100%	Future indicates service will be provided in the near-term
Percentage of agencies that offer senior-specific activities and services	TBD	100%	TBD indicates that service will be considered after further discussion
Percentage of agencies that offer adaptive-/therapeutic-specific activities and services	TBD	66.5%	TBD indicates that service will be considered after further discussion

Parks and Recreation Revenue, Expenditures, and Operational Metrics			
Category/Description	Smithfield, RI	New England (Median)	Notes
Operating expenditures per capita	\$40.09	\$71.00	Operating budget
Fees and charges revenue per capita	\$0.0	\$29.00	Not applicable until fees and charges are assessed
Fees and charges cost recovery percentage	0.0%	39.5%	Not applicable until fees and charges are assessed
Tax support per capita	\$44.76	\$47.00	Operating budget
Park operating expenditures per acre of parkland	\$2,541	\$1,631	Operating budget
Acres of parkland/open space per 1,000 residents	16.54	21.3	Operating budget
Percentage of recreation activities and programs that assess a fee	0.0%	93.3%	Not applicable until fees and charges are assessed
Number of participants per recreation activity or program	0	19	Not applicable until activities and programs are developed

3.6 P&R Market Analysis for Fee-Based Activities, Programs, and Services

As a community-based provider of recreation programming, P&R’s primary market for activities, programs, and services are Town residents. It is also appropriate to assume a small percentage of nonresidents—likely those who live within a short drive of the services offered—will participate in activities and programs. Furthermore, regardless of resident status, activity and program participation is likely to be made up from participants of all ages. Historically, recreation programs are viewed as youth-focused; however, due to the forecasted increase of age-in-place residents, the Town should assume multigenerational participation for many future offerings.

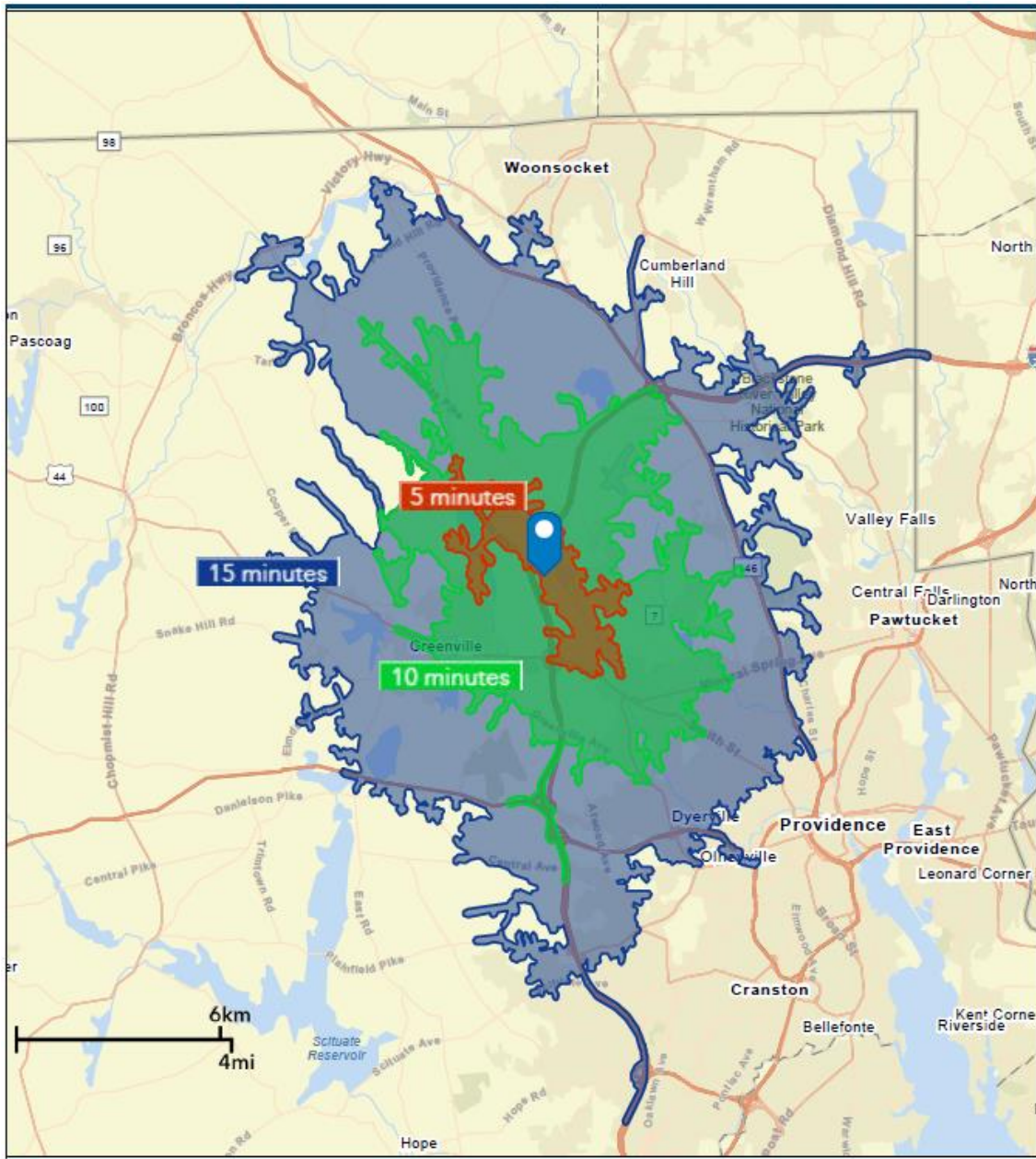
According to industry guidelines, the distance people are willing to travel for their recreation and fitness needs is 10 minutes. In a more urban setting such as Smithfield, where people are accustomed to traveling longer times and shorter distances to obtain services, the consulting team utilized a 15-minute drive time to establish market size. According to Esri’s Sport and Leisure Market Potential for Smithfield, there are 110,086 people living within a 15-minute drive of Smithfield who participated in community-based recreation activities in the last year. The BerryDunn team utilized these data to establish an estimated market size related to demand for



services. It is estimated that 20,000 – 22,000 people within a 15-minute drive from Smithfield engage in activities, programs, and services similar to what would be provided initially, though not all can be assumed to participate in activities and programs offered.

According to BerryDunn’s research, the market reach of recreation programs across the nation ranges anywhere from 2.8% to 41.6% of the community’s population. The percentage of nonresident market capture was set at 2% to 2.8% within a 15-minute drive time, which also informed projections. Therefore, the consulting team estimates that 440 to 616 participants may potentially engage with and actively seek out activities, programs, and services of the type offered through P&R, once established. A potential market service area map can be referenced below in Figure 3.6.

Figure 3.6: Potential Recreation Services Market: 15-Minute Drive Time



4.0 Initiative Implementation

This section contains an implementation timeline for recommended initiatives, the approach to ongoing governance, and implementation success factors.

4.1 Implementation Timeline

BerryDunn prioritized initiatives included in Section 2.2 and Section 3.2 based on when they should start and the duration to completion. Figure 4.1 contains a visual representation and monthly sequencing for each of the 14 initiatives.

Figure 4.1: Implementation Timeline

Month											
1	2	3	4	5	6	7	8	9	10	11	12
DPW Initiative 1 – Succession Planning											
DPW Initiative 2 – Phone System Upgrades											
DPW Initiative 3 – TUAM Asset Management System											
					DPW Initiative 4 – Finalize Performance Measures						
					DPW Initiative 5 – GIS Needs Assessment						
					DPW Initiative 6 – CIP Budget Detail						
								DPW Initiative 7 – Recycling Education			
					DPW Initiative 8 – Space Needs Assessment						
					P&R Initiative 1 – Age-Specific Programming						
					P&R Initiative 2 – Full-Time Rec. Coordinator						
								P&R Initiative 3 – Recreation Activity Software			
								P&R Initiative 4 – Program Pricing			
								P&R Initiative 5 – Cost Recovery Policy			
P&R Initiative – Reorganization of the P&R Department											

4.2 Plan Governance

Planning, deploying, and managing improved processes, systems, technology, and service delivery mechanisms will require strong leadership as well as clear strategic and tactical plans to best address the Town's challenges.

Once new initiatives are implemented, the Town will need to actively communicate the new processes, system functions, and/or services—as well as their benefits—to both internal and external stakeholders. For example, the Town should not expect that a DPW initiative to implement and consistently utilize a work order system will be widely adopted unless the benefits of doing so are effectively communicated, and the training is easy to attend or obtain. Similarly, the Town should not expect that a P&R initiative to begin assessing fees for some recreation activities, programs, and services will be widely accepted unless the rationale to do so is communicated effectively to residents and other participants alike.

New strategies create significant opportunity to change how the Town manages daily operations. The Town must plan for significant business process changes that streamline operations and focus on improving customer service.

4.3 Success Factors

One of the critical success factors for the implementation of these initiatives will be executive support. The Town should commit to undertaking the initiatives in this document, which will require executive support to allocate the appropriate Town resources, as well as help ensure that projects outside the scope of this report in current and future years are thoroughly evaluated before adjusting existing priorities.

In order to implement the initiatives outlined in this report, it will be critical for the Town to apply the recommended policies and project management practices and identify an internal resource(s) to lead project management and initiative implementation efforts. Implementing these initiatives not only takes Town resources, appropriate staff, and third-party resources, but also takes a structured project management methodology and champion to increase the likelihood of initiative success. To that end, the majority of DPW and P&R core initiatives identified in this strategic department assessment can be implemented within existing, personnel and non-personnel, resource levels.

BerryDunn created this report using the information gathered from Town stakeholders, work session findings, industry best practices, and benchmarking research activities. Active involvement on the part of Town stakeholders will be necessary to continually update and refine these recommended initiatives in the coming months and years.



Appendix A: Current Environment Overview

Current Environment Overview Report

MEMORANDUM

DATE: April, 2023

TO: Smithfield Project Team

FROM: BerryDunn Project Team

SUBJECT: Final Current Environment Overview Report

1.0 Introduction

This section of the memo describes the background of the project, the purpose and format of the memo, common terms and abbreviations, and the work performed.

1.1 Project Background

The Town of Smithfield, Rhode Island, (Town) has retained Berry Dunn McNeil & Parker, LLC (BerryDunn) to assist with performance assessment services, beginning with the Department of Public Works (DPW) and the Parks and Recreation Department (Parks and Recreation). This work will assess the departments' organizational structure and operation in order to provide recommendations for improved efficiency and effectiveness related to staffing, resource utilization, service delivery, mission, and compliance.

1.2 Memo Purpose and Format

The purpose of this memo is to present the current organizational structure, management practices, business processes, core service delivery practices, current resource allocation and fiscal standing of DPW, the Smithfield Water Supply Board (SWSB) Enterprise Fund, and Parks and Recreation. The information in this memo was collected through meetings with Town and department leadership, department staff, and external stakeholders; site visits; and review of information, data, and documentation provided by departments and Town stakeholders related to their operational and fiscal environments.

This memo is composed of the following four sections:

- 1. Introduction.** This section of the memo describes the background of the project, the purpose and format of the memo, common terms and abbreviations, and the work performed.
- 2. Current Environment Summary.** This section describes departments' current structure, processes, and challenges and presents BerryDunn's findings based on individual fact-finding meetings and documents provided by the Town.

3. **Primary Challenges and Opportunities for Improvement.** This section highlights the core challenges and opportunities initially identified. Themes were identified from interviews with Town leadership, department management, department staff, and stakeholders as well as insight gleaned from documentation and data reviews. This section is not inclusive of all challenges and opportunities identified, nor is it a complete representation of the best practices, opportunities, efficiencies, and implementation practices to be explored in the next phase of the project.
4. **Next Steps:** This section describes work to be performed in subsequent phases of the project and deliverables to be developed.

1.3 Definitions and Terms

For purposes of clarity when discussing this project, BerryDunn will use the following terms and related definitions.

Table 1.1: Project Terms and Definitions

Term	Definition
ARPA	American Rescue Plan Act
BerryDunn	Berry Dunn McNeil & Parker, LLC
Best Practice	An approach to leadership, management, daily work tasks, or a fiscal environment that has been demonstrated to result in efficient and effective net gains for an individual or entity.
DPW	Department of Public Works
GIS	Geographic Information System
KPI	Key Performance Indicator
NPDES	National Pollutant Discharge Elimination System permit
Parks and Recreation	Parks and Recreation Department
Performance Measure	A metric designed to provide insight into level of efficiency or effectiveness; output levels or outcomes; or workload or work quality.
PT	Part-Time
SWSB	Smithfield Water Supply Board
State	State of Rhode Island

2.0 Current Environment Summary

This section describes departments' current structure, processes, and challenges and presents BerryDunn's findings based on individual fact-finding meetings and documents provided by the Town.

2.1 DPW

2.1.1 DPW Organizational Structure and Management

Figure 2.1.1: DPW Current Organizational Structure

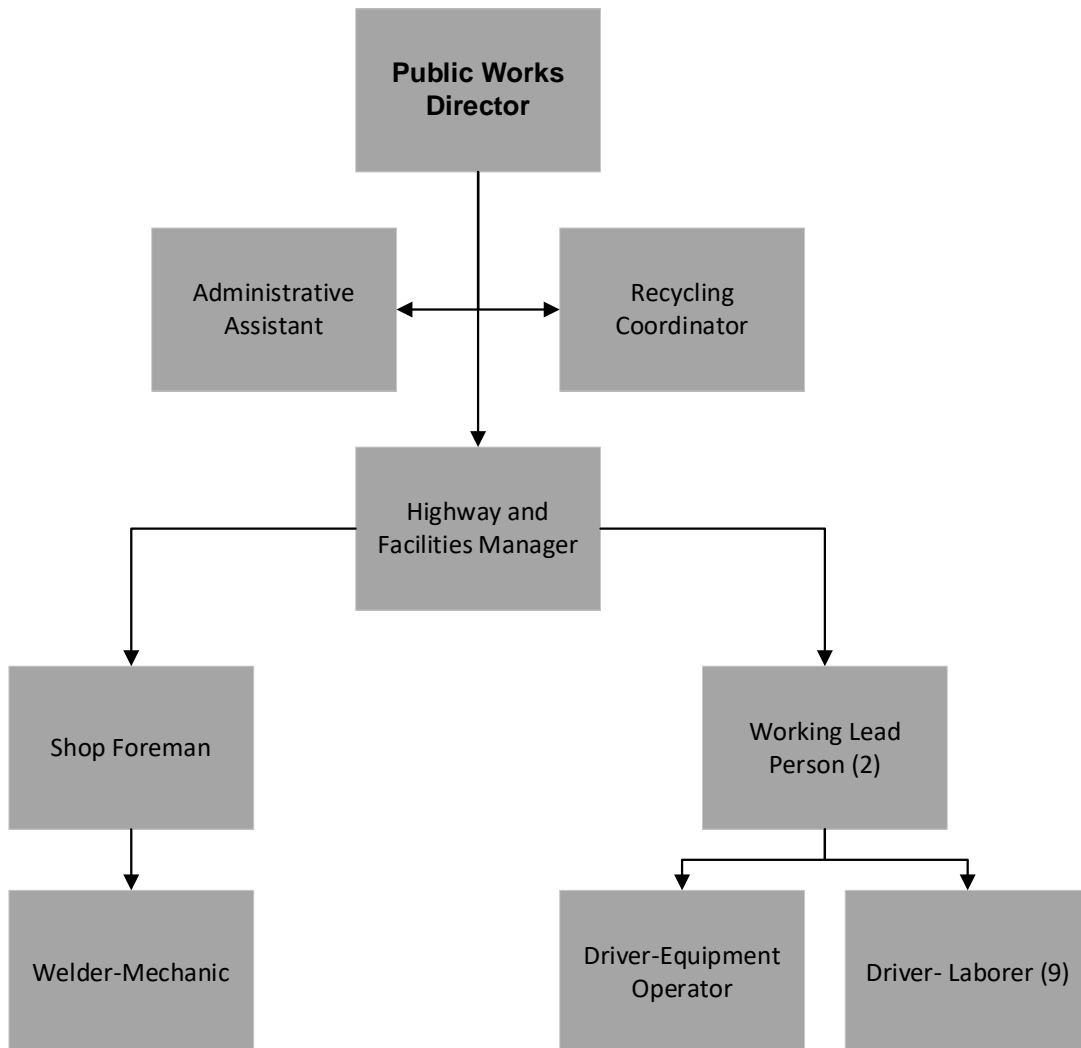


Table 2.1.1: DPW Organizational and Management Environment

DPW Organizational and Management Environment	
Current Environment	<p>The department is organized along the major service lines of administration; solid waste and recycling services; public right-of-way maintenance and services; fleet management; and capital improvement program development and management. While the formal organizational structure arranges all the work units and staff into a chain of command with identified, self-contained work functions, a number of business and administrative functions are centralized, allowing for some direct control, including the following:</p> <ul style="list-style-type: none"> • Operating and capital budget development • Various information technology services • Marketing and communications related to solid waste and recycling • Scheduling of tasks related to daily maintenance activities and special projects <p>This is a common organizational structure for public works departments of similar sizes delivering similar services.</p> <p>Led by the director and supported by an administrative assistant, the administrative function provides operating and capital budget development support and management, water billing and customer service (Section 2.2 provides more detail related to SWSB functions and services), personnel-related support and management. The administrative function also leads the development and identification of strategic priorities and initiatives related to department services and operations as well as Town-wide priorities and initiatives. The administrative function also supports review of plans and oversight of construction related to public infrastructure maintenance and improvements to help ensure compliance with Town standards. The director also leads efforts related to identifying core performance data, collecting data, and reporting progress on department and Town-wide priorities and strategic investments.</p> <p>The department’s solid waste and recycling services are managed and led by one recycling coordinator under the supervision of the director. The recycling coordinator is responsible for all aspects of solid waste and recycling collection, including the following:</p> <ul style="list-style-type: none"> • Overseeing and managing the solid waste and recycling collection and hauling contract with the Rhode Island Resource Recovery Corporation • Completing administrative duties, such as the following:

DPW Organizational and Management Environment	
	<ul style="list-style-type: none"> ○ Developing and distributing diversion reports and reporting solid waste and recycling metrics (e.g., tonnage collected, diversion rates, etc.) ○ Developing and managing grant applications ○ Managing the compost program and procuring related services and supplies ● Providing customer service support, including cart inventory, cart delivery, and “loaner cart” program management ● Providing outreach and education, including the development and coordination of special recycling and other events annually ● Managing core functions of the Town’s recycling center operation, which is located at the DPW corporation yard
Challenges	<ul style="list-style-type: none"> ● The department’s current phone system and related technology environment is outdated and inefficient. ● The department collects much of the data and information used to report on performance, progress, and outcomes manually. ● The department’s recycling coordinator has limited availability and opportunity to audit collection routes consistently and systematically to help ensure compliance with acceptable solid waste and recycling items. ● The department’s management and administrative support are regularly called upon to provide additional services related to the fire department and school department.
Opportunities for Improvement	<ul style="list-style-type: none"> ● The department would benefit from the continued development of new core performance measures (significant progress has been made to date developing draft measures) and to utilize technology and systems, where possible, to improve the collection and reporting of data. This information could not only be used to inform residents and stakeholders of progress and outcomes, but also to provide information to internal staff to support their daily scheduling, completing assigned tasks, and assessing the efficiency and effectiveness of service delivery. (Best Practice). ● The department would benefit from a geographic information system (GIS) personnel resource directly under the supervision and management of the department director. ● The department would be able to provide residents increased hours to access and drop off acceptable items at the recycling center with additional resources. ● The department could provide increased education and outreach services related to solid waste and recycling if the recycling

DPW Organizational and Management Environment	
	coordinator had capacity to return to Town schools to provide information. (Best Practice).

2.1.2 DPW Operations

Table 2.1.2: DPW Operations Current Environment

DPW Operations Current Environment	
Current Environment	<p>Department operations (core service delivery elements) are responsible for planning, coordinating, and completing daily assignments as well as larger infrastructure improvements related to Town roads, sidewalks, streetlights, facilities, and other right-of-way maintenance, repair, and improvement projects generally characterized as non-capital. DPW’s operations are also responsible for street sweeping on Town roads and contractor management.</p> <p>The department’s operation function consists of 18 authorized full-time positions. Staffing levels are currently reduced due to injuries and Workers’ Compensation benefits, making it difficult to backfill positions or bring in temporary staff. Operations staff are extremely knowledgeable of public works functions and operations and can technically perform many specialized tasks and services related to these functions. Operations staff are currently being called upon to provide greater levels of these specialized services and often struggle with efficiency due to shifting daily demands and workloads as well as limited personnel resources.</p> <p>The department’s organization chart shows a Highway and Facilities Manager position, which functions as the Assistant Director of Public Works. Of the two Working Lead Person positions, one has currently been reclassified to include duties related to department training and safety initiatives. The department has recently concluded efforts to develop a new job description and to specify specific safety related-tasks, which will now be included in the general duties of the reclassified position. Generally, the shop foreman position is responsible for planning and scheduling all fleet and equipment maintenance and repairs. Furthermore, the department has recently begun a pilot program—led by the department director and shop foreman—to assume responsibilities for specialized fire apparatus maintenance and repair services. Providing these additional services will benefit the fire department, having already significantly reduced vehicle and equipment down-time and repair and maintenance costs. It is evident that department staff continue progress related to identifying operational efficiencies and best practices, demonstrating willingness to assume additional duties and tasks, and delivering more services with no additional resources. Despite this, staff reported they are criticized more often than they are thanked from customers and stakeholders outside of the department.</p>

	<p>During staff interviews, the need for succession planning was a common theme, especially related to the department’s current operations environment. The majority of the department’s workforce is nearing, or at, retirement age: 75% of staff are over 50 years of age and 50% are over 60.</p> <p>In addition to the challenges related to succession planning, it has become increasingly difficult in recent years to attract and retain qualified external applicants. Staff believe the available pool of candidates is severely diminished due to younger workers choosing alternative career paths, not pursuing the appropriate training and licensure needed to secure a position within a public works department, or lacking interest in the type of work these departments perform. Staff expressed concerns related to current and future challenges in recruitment of qualified staff to fill vacancies.</p> <p>Finally, current operations are supported through the use of GIS asset management software. For an operation the size of the department, the utilization and accuracy of GIS technology and information is impressive. Led by the director of public works, GIS databases are consistently utilized to plan repairs and maintenance for highway and transportation infrastructure as well as other right-of-way assets. Furthermore, the DPW director devotes a significant amount of time to updating current asset information and database management, as well as spearheading efforts to identify and upload infrastructure elements not currently available within the database.</p>
<p>Challenges</p>	<ul style="list-style-type: none"> • Due to the last-minute scheduling of daily tasks, routine maintenance is often overlooked to deal with “daily fires” or emergency assignments. • The department currently has an aging workforce, with 75% of staff over 50 years of age and 50% over 60. • The department continues to experience challenges with recruiting qualified staff, making the scheduling of daily tasks challenging. Furthermore, due to recruitment challenges, opportunities to align new staff with veteran staff providing opportunities for training and knowledge sharing impedes succession planning. • The department does not currently operate a work order management system; therefore, daily workload and task types are not captured and cannot be reported on. This requires the scheduling of daily tasks be done using manual, paper-based processes.
<p>Opportunities for Improvement</p>	<ul style="list-style-type: none"> • The department would benefit from a job description review and update led by the human resources department. • The department’s current efforts to implement Trimble Unity Asset Management software will provide the opportunity to develop and utilize a consistent work order system, streamlining task scheduling as well as offering the opportunity to track and analyze work order



	<p>and workload data. The capturing and tracking of this data will assist the department with assessing current staffing levels in relation to levels of service being provided and demanded. (Best Practice).</p> <ul style="list-style-type: none"> • The department would benefit from training supervisory staff to utilize Trimble Unity Asset Management software so it can assist with entering information and data to produce work orders and run reports to review historical data and information entered into the system. • The department would benefit from establishing weekly, monthly, or quarterly staff meetings to allow frontline staff the chance to offer feedback related to the identification, prioritization, and scheduling of work and tasks. • The department would benefit from establishing a set of criteria for assessing the priority of work requests. • The department would consider contracting out for certain services, such as sidewalk repairs, to improve efficiency and reduce staff workload. (Best Practice). • The department would benefit from continued development (in conjunction with progress made to date) of performance and/or productivity benchmarks to assess crew performance and identify additional opportunities for efficiencies. • The department would benefit from continued encouragement to staff to complete required annual training targets to receive incentives outlined in bargaining unit contracts. (e.g., obtaining a job-related certificate for specialized training). The human resources department could help with tracking annual hours and certificates. (Best Practice).
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2.1.3 DPW Physical Environment

Table 2.1.3: DPW Current Physical Environment

DPW Current Physical Environment	
<p>Current Environment</p>	<p>Department operations are based at the facility on Spragueville Road, which includes administrative offices, a maintenance facility, fleet storage, a recycling center, salt/sand storage, and a composting area. The site also includes an animal control facility. The department is in the initial stage of a planned three-phase expansion project to expand and update its maintenance and administrative facilities. The existing maintenance facility needs significant repairs, including a new roof, and the current fleet and equipment maintenance areas cannot adequately accommodate the Town’s fire trucks, most DPW vehicles, or vehicle lifts needed for repairs and maintenance.</p> <p>Phase 1 of the project will include an addition to the existing maintenance facility with higher ceiling heights to accommodate vehicle and equipment lifts for all fire apparatus and DPW vehicles. The design for Phase 1 has been</p>

DPW Current Physical Environment	
	<p>completed. Construction will begin when sufficient funding has been identified. Phase 2 will include additional repairs and safety upgrades as well as a staff area; Phase 3 will include new administrative offices and an expanded recycling area. The department's administrative offices are currently located in a temporary office trailer. Offices were moved from the current maintenance building due to air quality concerns and challenges and safety concerns related to accessibility for the public.</p> <p>The fleet storage facility is generally meeting DPW's current needs. Recent improvements have been made to improve safety, accessibility, and insulation. Additional repairs are needed and programmed for the future should the department continue to enhance and expand service delivery.</p> <p>The department has created an area on-site for a recycling drop-off center, allowing residents to drop off a variety of materials and bulk items not suitable for curbside pickup. The department has also designated significant space at the rear of the Spragueville Road site for composting and general materials storage. This area is generally sufficient to accommodate current functions, but space will become limited as department functions and service offerings continue to grow.</p>
Challenges	<ul style="list-style-type: none"> • The department's current maintenance facility cannot accommodate adequate equipment/vehicle lifts, certain DPW vehicles, and certain fire apparatuses due to the current ceiling height being too low. • The department's current maintenance facility is in need of significant roof repairs. • The department's current maintenance facility does not have an adequate area for a staff break/lunchroom or locker room/changing area. • The department's administrative offices are currently housed in a temporary office trailer. • The department could use additional area for composting and recycling operations due to the recent success of the program and increased number of residents utilizing composting and on-site recycling services. • The department is limited in its ability to expand administrative and maintenance facilities at the Spragueville Road location due to the site being adjacent to a wetland area.
Opportunities for Improvement	<ul style="list-style-type: none"> • The department has completed the design of Phase 1 of the fleet maintenance facility expansion, which will greatly improve the current workspace and allow for adequate space to safely repair and maintain vehicles and equipment. (Best Practice).



DPW Current Physical Environment	
	<ul style="list-style-type: none"> The department should prioritize Phases 2 and 3 of the facility expansion/renovation project to improve the workspace for staff and allow for a more safe, efficient use of the site. (Best Practice). The department would benefit from continued assessment of the long-range needs of the physical space at the Spragueville Road site. Needs should be identified and related to current department services and additional services the department may be required to provide to both internal and external customers in the future.

2.1.4 DPW Operating Budget

Table 2.1.4: DPW Operating Budget

DPW Operating Budget	
Current Environment	<p>The department typically starts its budgeting process in January. The department receives instruction from the Town Manager and Finance Director to begin preparing their projections for the current fiscal year and budgets for the new fiscal year. The department uses prior fiscal year data and knowledge as a starting point to prepare projections and to develop new budget requests. The department does not employ a zero-based budget approach to budget development. The information compiled then provides the foundation for the department to begin initial budget discussions with the Town Manager, Finance Director, and Budget and Financial Review Board. Capital budget development follows a similar process. Department staff reported this process generally works well; however, a more intuitive process and system with clearer workflows would be beneficial.</p> <p>The Town Council approved a department operating budget (exclusive of highway funding and solid waste and recycling expenses) of \$2,783,158 for fiscal year 2023. This represents a \$326,038 (13.3%) increase from fiscal year 2020; a \$310,717 (12.6%) increase from fiscal year 2021; and a \$149,250 (5.7%) increase over fiscal year 2022 projected expenditures. Main drivers related to the expenditure increases are related to increased personnel costs and operating and maintenance supplies. (Greater detail related to the department capital program can be found in Section 2.1.5).</p> <p>The department’s annual budget for highway maintenance and associated infrastructure is \$1.7 million for fiscal year 2023. This includes a significant amount of one-time funding associated with federal American Rescue Plan Act (ARPA) funds. Generally, the department’s highway maintenance and associated infrastructure budget has averaged \$544,044 over the past three fiscal years.</p>

DPW Operating Budget	
	The department's fiscal year 2023 budget also includes \$608,000 for hydrant and street light services and \$1,597,000 for solid waste and recycling collection and disposal services.
Challenges	<ul style="list-style-type: none"> The department does not currently utilize performance measurements (though draft performance measures have been developed to date). This does not appear to be a purposeful obfuscation, but rather a lack of proper systems (technology and other) available to track project data accurately and efficiently. This lack of clarity with regard to operational performance means that it is difficult to determine where improvements might need to be made as well as few opportunities to report out and demonstrate all of the projects successfully completed with the resources allocated. The department's annual highway maintenance and associated infrastructure budget allocation is placed in its operating budget segment despite the majority of work funded with these funds are capital improvements in nature.
Opportunities for Improvement	<ul style="list-style-type: none"> The department would benefit from the continued development of performance metrics related to core operational services (e.g., fleet maintenance, road maintenance, street sweeping, etc.). (Best Practice). The department would benefit from linking performance metrics, once finalized, to funding allocation levels to help further articulate how funding levels translate into desired outcomes. The department's annual highway maintenance and associated infrastructure budget allocation should be moved to a capital budget segment. This would allow for the more accurate assignment and management of funds and perhaps opportunities to further break out funding detail associated with traditional capital maintenance activities.

2.1.5 DPW Capital Improvement Management

Table 2.1.5: DPW Capital Improvement Budget and Management

DPW Capital Improvement Budget and Management	
Current Environment	The department director currently leads and manages all capital program development and coordination related to Town highway and other right-of-way infrastructure. The department develops and implements the Town's capital improvement program related to right-of-way infrastructure by assisting with the scoping of projects, supporting design, developing bid documents, and managing active projects. Furthermore, the department provides traffic engineering support and GIS mapping services, seeks out

DPW Capital Improvement Budget and Management	
	<p>grant funding, and supports plan review and construction of all Town capital projects to help ensure compliance with all Town standards.</p> <p>The department reports Town transportation infrastructure is a priority and has developed a thorough capital funding analysis to demonstrate maintenance and improvement progress related to highway infrastructure. Utilizing Beta pavement management software, the department tracks, monitors, and frequently updates a variety of asset data and condition information related to transportation and traffic infrastructure, catch basin and drainage information, signage, and overall GIS and asset management. In doing so, the department has developed a highway capital funding program that clearly demonstrates what various levels of annual capital funding will allow the department to accomplish related to Town highway infrastructure and pavement condition. In just two years, utilizing the Beta system and a data-driven approach to capital funding and project identification, the department has increased the Town's overall pavement quality score by two points, raising it from 65 to 67. While seemingly insignificant, a one-point increase in overall pavement condition score represents substantial improvements to Town highway infrastructure.</p> <p>The Town employs a town engineer who supports many functions, including contractor management, planning support, erosion control and stormwater management related to the Town's surface water discharge permit (National Pollutant Discharge Elimination System [NPDES]), and wastewater systems operation and maintenance. Therefore, design and inspection support related to public works-led capital projects is not always available. Furthermore, the Town's organization chart incorrectly depicts the town engineer position as reporting to the director of public works though the town engineer's office is located at Town Hall and the position reports to the Town Manager. This organizational dynamic, however, does not appear to create a non-collaborative working environment.</p>
Challenges	<ul style="list-style-type: none"> • The department does not currently utilize performance measurements to demonstrate performance (though draft performance measures have been developed to date). This does not appear to be a purposeful obfuscation, but rather a lack of proper systems to track capital project data accurately and efficiently. This lack of clarity with regard to capital project delivery performance means that it is sometimes difficult to determine where additional improvements might need to be made as well as few opportunities to report out and demonstrate all of the capital projects successfully completed and the benefit realized. • The department does not currently have dedicated professional engineering support in the form of an engineering personnel resource who reports to the director of public works and primarily supports

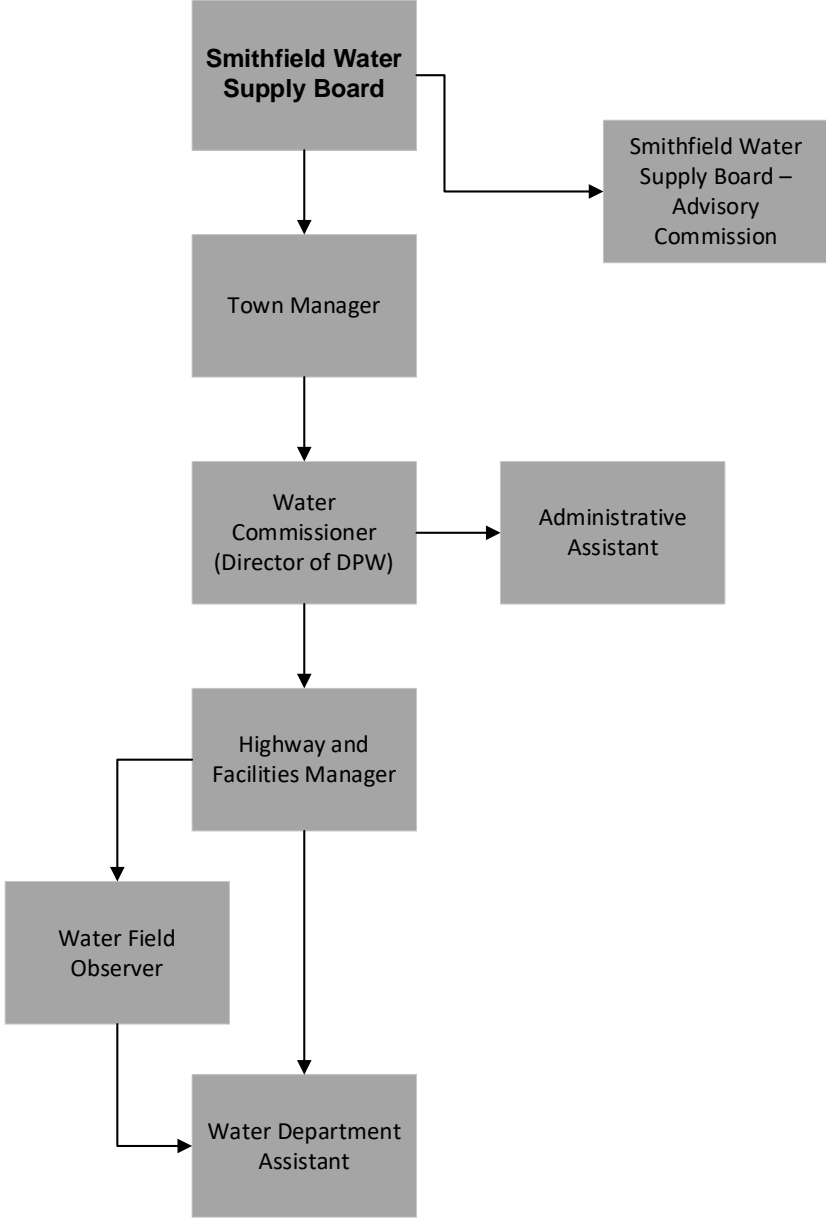


DPW Capital Improvement Budget and Management	
	<p>public works operations and capital projects design, construction, and inspection.</p> <ul style="list-style-type: none"> • The department does not currently have a dedicated GIS resource to assist with asset and infrastructure information updates and GIS database management. • The department does not have maintenance requirements and schedules for capital assets within any system or work order environment (e.g., GIS systems and software). • The department’s capital improvement budget is lacking line item budget detail needed to more efficiently manage and allocate resources and to report progress made. (e.g., highway maintenance and improvement funding is a lump-sum allocation in the department’s operating budget).
Opportunities for Improvement	<ul style="list-style-type: none"> • The department would benefit from the continued development of performance metrics related to core capital project services provided (e.g., street slurry, highway resurfacing, and/or high reclamation projects annually). (Best Practice). • The department would benefit from developing maintenance requirements and schedules for capital assets utilizing GIS software. Schedules would outline specific time(s) of year and estimated duration to complete; staffing, equipment, and resources needed; and any other notable elements specific to the asset(s) or maintenance program to be completed. (Best Practice). • The department would benefit from a dedicated professional engineering and/or GIS personnel resource who reports to the director of public works. • The department would benefit from continued refinement of its equipment depreciation schedules. (Best Practice). • The department would benefit from more detailed capital improvement budget line item information related to pavement management and maintenance. For example, budget line items dedicated to crack sealing, preventive maintenance, and full reclamation would help the department manage funding more efficiently. • The department has made significant progress related to pavement management and maintenance. Continued use of pavement management software Beta, monitoring pavement condition scores, and articulation of funding levels and impact to pavement conditions will provide the justification for increased funding levels in the future. (Best Practice).



2.2 SWSB

Figure 2.2: SWSB Current Organizational and Management Structure



2.2.1 SWSB Operational and Management Structure

Table 2.2.1: SWSB Operational and Management Structure

SWSB Organization and Management	
Current Environment	<p>The SWSB operates as an Enterprise Fund, with all operations funded from user fees and non-metered charges. The Town Council also acts as the Board of Water Commissioners. In 2019, the SWSB appointed a five-member Advisory Commission. The volunteer Advisory Commission provides analyses and insight into SWSB policy and fiscal matters. The director of public works also serves as the Smithfield Water Commissioner. The Commissioner, in conjunction with the highway and facilities manager, oversees day-to-day operations and is responsible for identifying, prioritizing, and scheduling daily work. The SWSB employs two full-time, technically proficient, and properly licensed, staff whose responsibilities include daily operations and maintenance of the system, capital planning, and emergency response. SWSB staff reported DPW operations staff often assist with routine repairs and maintenance, provide support for larger infrastructure projects, and assist with emergency response and repairs when needed.</p> <p>SWSB administrative operations are performed by the DPW administrative assistant. The public works department’s administrative assistant is responsible for generating quarterly bills for customers utilizing the Vision Government Solutions Billing system. The administrative assistant position is also responsible for all SWSB customer service elements, including responding to customer inquiries, bill support, and adjustments as well as required State reporting of information and metrics.</p> <p>The Town’s tax collection department also assists the SWSB with billing and collections related to water customer payments. Responsibilities include receipt of payments, posting payments and maintaining financial records related to customer accounts, and customer service support.</p> <p>The general organization of the SWSB is similar to other organizations of similar size providing potable water distribution services to a customer base the size of SWSB’s.</p>
Challenges	<ul style="list-style-type: none"> • The SWSB uses the Vision Government Solutions Billing system, which is not right-sized for current operational needs in its current version. This results in less effective and efficient customer service responses as well as challenges related to accurate and efficient reporting outputs (an upgrade of the billing system is currently underway, led by the Town Assessor). • SWSB’s current field maintenance staffing levels allow for little opportunity to cross-train staff, which would enable the department to respond more quickly and efficiently to spikes in workloads.

SWSB Organization and Management	
	<p>Furthermore, SWSB’s two full-time staff are nearing retirement, and the personnel structure does not allow for a new hire prior to a position becoming vacant. This reduces opportunities to train and transfer system institutional knowledge.</p>
Opportunities for Improvement	<ul style="list-style-type: none"> The SWSB will benefit from the upgrade of its Vision Government Solutions Billing system when complete. Updates may allow for more efficient access to data related to customer billing history, payment collections, usage trends and comparisons, as well as more efficient customer interactions and enhanced reporting capabilities.

2.2.2 SWSB Operations

Table 2.2.2: SWSB Operations

SWSB Operations	
Current Environment	<p>The SWSB provides high-quality potable water to more than 1,600 residential, commercial, and industrial customers throughout the Town and a portion of the Town of North Providence. The Town’s main—and only—source of water is purchased from the Providence Water Supply. In addition to the SWSB, the Town is supplied water by two other districts: the Providence Water Supply Board and the Greenville Water District. Staff reported each district generally supports one another and “helps” each other out when necessary.</p> <p>As mentioned above, SWSB employs two full-time field maintenance staff. Staff are responsible for repair and maintenance of the water distribution system, which consists of more than 41 miles of water mains of various sizes. Furthermore, staff help direct larger infrastructure improvements and respond to emergencies. Staff also perform water meter reads utilizing the Beacon Meter Reading System.</p> <p>Staff reported operating an effective preventive maintenance program is a priority, and it was clearly demonstrated that staff take initiative with regards to identification and prioritization of work. It was stated on one occasion by a staff member that “I’m always looking to see how I can continue to make the system better.” Daily, weekly, and monthly work logs are maintained by staff, which are utilized to identify daily work needs. Staff did report that attention needed for daily “fires” or unforeseen circumstances often help prevent some of the “would be nice to do” work from getting done related to betterment of the system, though this type of work is not entirely vital to the core operation, maintenance, and safety of the distribution system.</p> <p>Staff reported having access to sufficient resources (i.e., tools, equipment, etc.) needed to perform their daily work. Staff also reported the SWSB</p>

SWSB Operations	
	<p>maintains a “good inventory” of all common parts and supplies needed to perform routine maintenance, complete improvements, and address emergency situations with sufficient on-hand inventory.</p> <p>Another sound operational and management tool is the SWSB’s utilization and maintenance of Esri GIS asset management software. For an operation the size of the SWSB, the utilization and accuracy of GIS technology and information is impressive. Led by the water commissioner, GIS databases are consistently used to efficiently and effectively plan repairs and maintenance related to the distribution system. Similar to right-of-way maintenance of right-of-way assets, the director of public works devotes a significant amount of time updating current asset information, managing the database, and spearheading efforts to identify and upload infrastructure elements not currently available within the database related to the distribution system.</p> <p>Generally, the current staffing allocations funded by the SWSB are sufficient to support current operations. There were reported concerns, however, related to staff approaching retirement age, and no available internal candidates and/or other qualified individuals to potentially backfill positions once they become vacant. There may also be a need for additional personnel resources in the future to support business and system continuity. This assessment of the need for additional resources could be better analyzed once a work order system is in place.</p>
Challenges	<ul style="list-style-type: none"> • The SWSB does not currently have an automated work order system, resulting in the need for staff to manually develop and utilize paperwork order forms. • SWSB staff generate work orders to identify and assign daily tasks. It was reported work order information is not recorded or utilized in any manner that would allow it to be analyzed efficiently. • Staff also reported a lack of effective communication and comradery among current SWSB staff. • SWSB staff are long-term employees, near the same age, with similar total years of service. This creates the likely scenario that both staff members will retire from service at, or close, to the same time leading to a significant loss in institutional knowledge as well as significant challenges related to business continuity and service delivery.
Opportunities for Improvement	<ul style="list-style-type: none"> • SWSB is updating the Vision Government Solutions Billing system (in conjunction with other Town departments) to allow for more efficient and effective water billing operations, customer service, as well as opportunities for more accurate and detailed reporting of water billing data and usage metrics, which can help support maintenance operations. (Best Practice).

SWSB Operations	
	<ul style="list-style-type: none"> • SWSB operations will benefit from efforts being led by the water commissioner to implement the Trimble Unity Asset Management system. This will allow for automated work order generation and management as well as work order data to be captured, analyzed, and reported out on, which can then be used to further assess operational efficiency and assist with management decisions. (Best Practice). • The SWSB would benefit from the support of a dedicated full-time GIS position. The addition of a GIS position to support the GIS technology needs of the SWSB (as well as other applicable Town functions) would allow the director of public works the opportunity to step away from day-to-day GIS maintenance and management tasks and focus on SWSB’s supervisory and system management needs. • SWSB would benefit from developing an approach to allow for a new personnel resource to be hired prior to current staff retiring. This would allow for the new hire to have time to work along side current staff to learn operational and system specifics, receive appropriate specialized training, and to help ensure efficient SWSB operational and business continuity.

2.2.3 SWSB Operating and Capital Budget

Table 2.2.3: SWSB Operating and Capital Budget

SWSB Operating and Capital Budget	
Current Environment	<p>As an Enterprise Fund, the Water Supply Board funds all operations from user fees and assessments. User fees and charges are assessed each year in an amount necessary to cover the projected operating expenses, capital needs, and debt service of SWSB operations for each year. Currently, the rate structure consists of three rate tiers that encompass all residential, commercial, and industrial usage as well as non-metered service charges.</p> <p>The Town Council approved a SWSB operating and capital budget of \$2,151,354 for fiscal year 2023. This represents a \$802,761 (59.5%) increase from fiscal year 2020 operational and capital expenditures; a \$589,103 (37.7%) increase from fiscal 2021 operational and capital expenditures; and a \$359,283 (20.0%) increase over fiscal year 2022 projected expenditures. Main drivers related to the expenditure increases are related to the increased cost of water purchases, operating supplies, repairs, capital investments, and indirect operational costs. Charges for services, on average over the past three fiscal years, have represented 85.2% of the total funding for SWSB operations. The remainder of funding comes from a variety of other non-metered charges, sale types, bond proceeds, and investment income.</p>

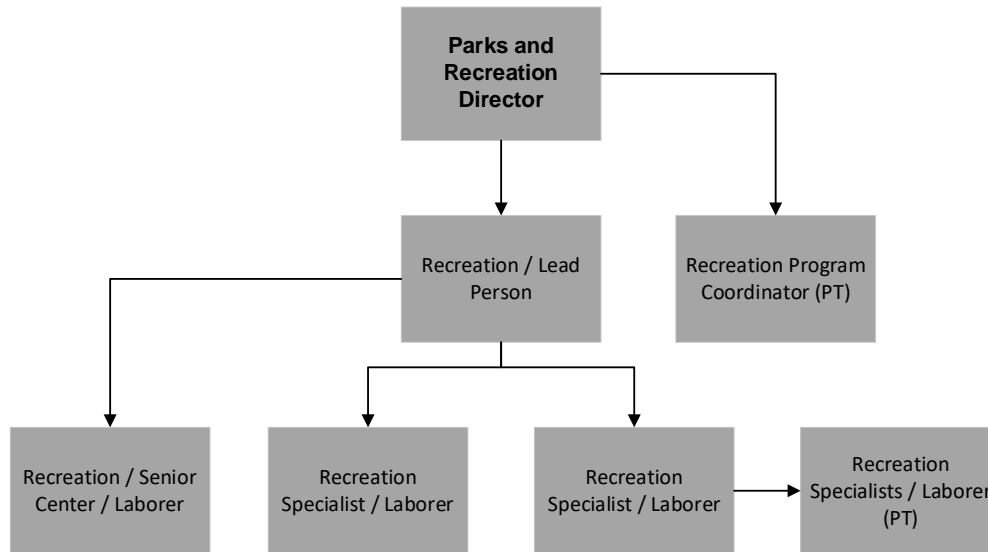
SWSB Operating and Capital Budget	
	<p>The SWSB maintains a fund balance sufficient to help ensure business and service continuity if a downturn in the economy, or some other unforeseen event or circumstance, occurs. To that end, user fees and charges are generally set at levels to generate sufficient revenue to cover the annual cost of providing all services. Furthermore, fees and charges also need to be set at levels designed to generate enough revenue to maintain adequate reserves. It is evident that the SWSB has, in recent years, set fee levels to meet annual revenue requirements and allow for periodic contributions to the fund balance. It is also evident that SWSB leadership and staff carefully monitor local indicators related to water system infrastructure and customer distribution needs and consider these factors when setting water rates.</p> <p>In discussions with staff, it is evident SWSB is continuously proactive and aware that continued proper planning and fiscal management related to water system infrastructure improvements is necessary to help ensure the system continues to function safely and efficiently. SWSB staff report significant progress related to water infrastructure improvements. Two major storage tank rehabilitation projects have been successfully completed. Staff also report significant progress with commercial water meter change-outs. Water operations staff also contribute deep institutional knowledge and support the design and review of all related water capital improvement projects. Furthermore, the SWSB has recently completed multiple studies related to system quality, capacity, and functionality (system infrastructure), as well as studies to identify capital and operational funding needs for the next 15 years. This further demonstrates the proactive approach the SWSB has taken in recent years to help ensure the operation of a quality water distribution infrastructure.</p> <p>To that end, the SWSB’s five-year capital improvement plan, fiscal year 2023 through fiscal year 2027, identifies more than \$10 million in capital infrastructure improvements and replacement needs—mainly major, multi-million-dollar water main replacements. Taking a 10- to 15-year look, capital infrastructure improvement and replacement needs may exceed \$15 million based on current identified needs. This amounts to over \$6,000 per rate payer annually should all of these capital needs be funded. Obviously, these projected capital improvement costs far exceed the amount that could realistically be funded by rate payers in the time frame outlined. Therefore, SWSB leadership will have to continue to identify and prioritize the most pressing and vital needs to help ensure proper functionality of the distribution system into the future.</p>
Challenges	<ul style="list-style-type: none"> • SWSB operations currently has an identified capital improvement backlog in excess of \$10 million over the next five years. • The SWSB is unlikely to generate sufficient funding solely from rate payers to fund all currently identified capital needs.

SWSB Operating and Capital Budget	
	<ul style="list-style-type: none"> The SWSB is projected to experience substantial increases in water purchase costs.
Opportunities for Improvement	<ul style="list-style-type: none"> The SWSB would benefit from completing an annual water cost-of-service analysis (internally). Annual analyses help alleviate large increases and, thus, large impacts to rate payers when rates are set for three years at a time. This also provides the SWSB with more consistent and accurate information related to projected cash flows to fund operations, conduct maintenance and repairs, and identify available capital funding more effectively. (Best Practice). SWSB leadership and staff should continue to track, in detail, the daily operational, maintenance, and capital requirements of the distribution system and assess the realistic amount that could be funded by rate payers. (Best Practice). SWSB operations currently reports having satisfactory water infrastructure and asset data and information housed in GIS software. Continued addition of additional infrastructure and assets elements into GIS will benefit the department and allow staff to locate and maintain assets more efficiently and effectively (e.g., curb stops and valves). (Best Practice).

2.3 Parks and Recreation

2.3.1 Parks and Recreation Organizational Structure and Management

Figure 2.3: Parks and Recreation Current Structure



2.3.1 Parks and Recreation Organizational and Management Structure

Table 2.3.1: Parks and Recreation Organizational Structure and Management

Parks and Recreation Organizational Structure and Management	
Current Environment	<p>Parks and Recreation currently has five full-time staff positions (director, recreation / lead person, a recreation / senior center / laborer, and two recreation specialists / laborer), one part-time recreation program coordinator, and part-time recreation specialists / laborers. The department is currently operating out of one small office within the Town Senior Center. There is currently no dedicated indoor recreation space or office space to accommodate public-facing operations; however, a new parks and recreation administrative space is scheduled to open in 2023 and will also have space for community and recreational activities, with certain areas open for public use and/or rental.</p> <p>The department director oversees all department operations, including facility maintenance, field use, and recreation programming. The recreation / lead person oversees daily maintenance operations. All department staff report to the director. The director is currently working additional hours to help support field staff. The recreation / lead person has taken on more administrative duties to support the director.</p>

Parks and Recreation Organizational Structure and Management	
	<p>Department operations involve limited use of technology. Communication among staff happens primarily via radio, personal cellphones, or in person. The department recently implemented a new facilities management software system, FMX, for scheduling and permitting field time and usage related to open space. Staff report this has streamlined the scheduling and permitting process, reduced the volume of phone calls to department staff, and helped prevent double-booking fields and open space.</p>
Challenges	<ul style="list-style-type: none"> • The department director is often required to support maintenance activities due to the current capacity of department maintenance staff. • The department’s recreation / lead person often assumes office administrative responsibilities to support the director as needed. • The department’s maintenance responsibilities have increased in the past year (e.g., the opening of a new dog park) and are expected to continue increasing with the scheduled opening of the 114-acre Camp Shepard recreation facility in 2023 and the recently completed new splash pad at Deerfield Park. • The department reports sports seasons have been extended in recent years (e.g., field use extended into December and beginning in March), requiring maintenance later in the fall and starting early in the spring. • The department does not currently utilize performance metrics, making it difficult to track progress, assess efficiency and effectiveness, or utilize a data-driven approach to justify future budget and resource needs.
Opportunities for Improvement	<ul style="list-style-type: none"> • The department may benefit from a job description review and update to address expanded responsibilities for the department. • Department staff noted the addition of an assistant director position would benefit the department and help support its growth trajectory. • The department would benefit from developing key performance metrics to help assess productivity, effectiveness, and outcomes related to daily work performed, and well as to help articulate the use of resources. (Best Practice). • The department would benefit from developing a communications policy to set expectations and protocol for field staff in the event of an emergency or a change in work assignment.

2.3.2 Recreation Operations

Table 2.3.2: Recreation Operations

Recreation Operations	
Current Environment	<p>The department provides limited recreational programming directly. However, it does facilitate and manage various private providers who offer tennis, softball, basketball, and pickleball activities. The department also partners with the Smithfield YMCA to offer a summer recreation camp for youth in grades kindergarten through sixth grade.</p> <p>In order to continue expanding recreational opportunities for Town residents, the department hired a part-time recreation program coordinator (19 hours per week) in September 2022 to further develop and manage recreation programs and events. Prior to this, the Town did not have any staff dedicated solely to recreation programming. With this new position, the department is looking to further explore various types of activities, programs, and events the community would like to see offered. Initially, the Town has prioritized the development of activities and programs for teens. The department conducted a survey of middle and high school students to identify events and activities of interest. Using those survey results, the department planned and hosted multiple events and has begun offering other programming. It is a priority of the department to continue to develop recreation offerings of various types to serve all members of the community.</p>
Challenges	<ul style="list-style-type: none"> • The department has limited programming personnel resources (one part-time resource) responsible for managing current program and services offerings; increasing service offerings; and conducting marketing, education, and outreach. • The department offers limited age- or activity-specific programming. For example, there are no teen-specific activities, programs, or services currently being offered. • The department does not have its own transportation (bus or van) to support recreation activities and programs. • The department does not have a system to manage activity or program registration or track related metrics (registration, participant counts, fees, etc.).
Opportunities for Improvement	<ul style="list-style-type: none"> • The Town Council has expressed a desire and supported the expansion of recreation programming and services offerings with a focus on activities for teens and community events initially. (Best Practice). • The department would benefit from access to a Town bus or van to transport participants for community events and recreational activities.



Recreation Operations	
	<ul style="list-style-type: none"> • Department staff noted a need for additional recreational staff resources to support the development of a greater variety of programs and activities. • As programming expands, there will be a need for a system to manage and track programs, registrations, fees, and other key metrics related to recreational activities and programming. (Best Practice). • As programming expands, the department should consider developing a cost-recovery policy, formalizing a philosophy to generate revenue by charging fees for activities, programs, and services in relation to the total operational costs to provide them. (Best Practice). • As programming expands, the department should develop and monitor targeted ranges of cost recovery related to specific activity and service categories. It should also consider adjusting fees when cost-recovery levels begin to approach set targets or revenue requirements are met. (Best Practice). • As programming expands, it may be necessary to establish fees for certain types of activities, programs, services, and/or field and open space usage. Establishing a price for a program or service can be done through a variety of strategies. Arbitrary pricing is not encouraged because it is difficult to justify. Following a cost-recovery pricing approach based on goals within percentage ranges is generally a better approach. (Best Practice).

2.3.3 Parks Operations

Table 2.3.3: Parks Operations

Parks Operations	
Current Environment	<p>The department has one working recreation / lead person and three full-time maintenance staff to support all parks and open space maintenance operations. One maintenance staff member, the recreation / senior center / laborer, is fully dedicated to the maintenance of the Deerfield complex, and the other two recreation specialist / laborer positions are responsible for maintaining the remaining facilities. Staff reported that both the recreation / lead person and the director often both help with park maintenance activities and services. Parks operations is responsible for the maintenance of grounds, open space and playing surfaces at multiple facilities and locations throughout the Town. Facilities, fields, and open spaces include the following:</p> <ul style="list-style-type: none"> • Town Hall • Schools Administration Building

Parks Operations	
	<ul style="list-style-type: none"> • Deerfield Park • Esmond Street Recreation Center • Esmond Park • Burgess, Mendes, and Willow ball fields • Whipple Ball Field Complex • School Grounds and Landscaping • School Athletic Fields • School Playgrounds • Recently Opened Town Dog Park <p>The department is also responsible for maintaining and operating Town beaches. The department also maintains Town cemeteries (Friends of the Cemeteries, a volunteer group, assists the department with maintenance at cemeteries). Furthermore, the department also provides significant snow plowing and snow shoveling support at multiple schools and Town facilities and often transitions to help public staff, when possible, with snow and ice removal.</p> <p>The department maintains the interior and exterior of all concession buildings and restrooms. This includes painting, roofing, electrical, maintaining a current Department of Health food license, fire suppression system, and winterizing. Staff are also responsible for stocking and cleaning restrooms daily.</p> <p>Department staff are also responsible for field permits and field scheduling. Permits are required to reserve times on fields and open space. The department does not currently charge a fee for the use of fields or open space. Staff use FMX scheduling software to manage open space reservations and issue permits.</p> <p>Department staff perform most general equipment and machinery maintenance in-house (e.g., daily/weekly/monthly greasing of all machinery bearings, checking oil and fluid levels, changing fluids and filters, and sharpening lawn mower blades, etc.). If a piece of equipment is not able to be maintained and/or repaired by staff, it is sent to the appropriate external entity for service.</p>
Challenges	<ul style="list-style-type: none"> • The department director often assists with maintenance and fieldwork tasks. • The department has limited opportunities to allow field and open space the opportunity to “rest” (as is best practice in field

Parks Operations	
	<p>management) due to demand for fields and open space being consistently greater than availability.</p> <ul style="list-style-type: none"> • The department’s working lead person often assumes office administrative duties to support the director as needed. • The department does not currently charge a fee for fields and open space usage. • Department staff reported experiencing an increase in responsibilities and demand for additional levels of services without increases in resource allocation. • The department is not currently tracking work orders or utilizing a work order management system. • The department is not able to track and report on fuel consumed, materials used, and number of hours spent maintaining a site or providing a service.
Opportunities for Improvement	<ul style="list-style-type: none"> • The department has expressed a desire to charge fees for the permitted use of Town fields for use by private sports clubs or for teams from neighboring towns. (Best Practice). • The department has expressed a desire to charge fees for large events to help cover cleanup and maintenance costs. • The department can expand its use of FMX to include work orders, maintenance, inventory, and fees for field use. (Best Practice).

2.3.4 Parks and Recreation Physical Workspace

Table 2.3.4: Physical Workspace

Physical Workspace	
Current Environment	<p>Four department staff currently work from the Deerfield Senior Center. The Town is currently renovating an existing facility, which will be the new administration and office space for department staff. Staff reported they are roughly eight months from completing renovations and estimate they will relocate by the end of summer 2023. Staff also stated there will be spaces for community events and recreation programs. The department also utilized two maintenance garages located at other sites in the area. Two parks specialists utilize these maintenance garages, which house equipment and supplies mainly used for park maintenance. Staff reported one garage does not have running water.</p>
Challenges	<ul style="list-style-type: none"> • The department experiences a loss of operational and maintenance efficiency due to travel time from the maintenance garages to work sites.

Physical Workspace	
	<ul style="list-style-type: none"> • Department staff reported maintenance garages need significant repairs and upgrades. • The department will need janitorial services once the new administrative recreation facility is opened.
Opportunities for Improvement	<ul style="list-style-type: none"> • The department's new administrative and recreational facility will provide much-needed office workspace for staff as well as additional indoor recreation program space. • The department should prioritize repairs and upgrades to the maintenance garages to improve safety and working conditions.

2.3.5 Parks and Recreation Operating Budget

Table 2.3.5: Parks and Recreation Operating Budget

Parks and Recreation Operating Budget	
Current Environment	<p>The department typically starts its budgeting process in January in conjunction with other Town departments. The department receives instruction from the Town Manager and Finance Director to begin preparing their projections for the current fiscal year and budgets for the new fiscal year. The department uses prior fiscal year data and knowledge as a starting point to prepare projections and develop new budget requests. The department does not employ a zero-based budget approach to budget development. The information compiled then provides the foundation for the department to begin initial budget discussions with the Town Manager, Finance Director, and Budget and Financial Review Board. Capital budget development follows a similar process. Department staff report this process generally works well.</p> <p>The Town Council approved a department operating budget (inclusive of capital outlays) of \$886,734 for fiscal year 2023. This represents a \$95,943 (12.1%) increase from fiscal year 2020; a \$146,186 (19.7%) increase from fiscal year 2021; and a \$72,282 (8.9%) increase over fiscal year 2022 projected expenditures. Main drivers related to the expenditure increases are related to increased full-time and part-time personnel costs and operating and maintenance supplies.</p> <p>The Town charges for vehicle parking, motorboat operation, and beach use at Georgiaville Beach. It does not charge for use of other park facilities, including use of Town fields by private sports leagues or other municipalities. Staff reported \$14,000 in estimated revenue derived from the tennis program and beach parking permits.</p>
Challenges	<ul style="list-style-type: none"> • The department generates minimal revenue from beach parking/use and fees for programs.

Parks and Recreation Operating Budget	
	<ul style="list-style-type: none"> The department does not generate revenue from field use permits. Staff reported limited resources to support administrative tasks, maintenance, and recreation programming.
Opportunities for Improvement	<ul style="list-style-type: none"> The department would benefit from charging fees for the permitted use of Town fields. The department should explore the viability of charging fees for large events to help cover the cost of cleanup and maintenance.

2.3.6 Capital Improvement Budget and Management

Table 2.3.6: Capital Improvement Budget and Management

Capital Improvement Budget and Management	
Current Environment	<p>The department receives the majority of its funding for capital improvements from the Town’s general fund. The department includes suggested capital improvements in the annual budget and works with the Town Manager and Finance Director to review each request. Capital requests generally include equipment replacements, fleet upgrades, and projects related to field and facilities improvements. The department does not currently have a system for tracking maintenance resources utilized for parks and fields, the use of equipment and materials, or other key operational and capital metrics that could provide insight for future budget planning efforts and resource allocation.</p> <p>The department proposed the following capital improvement projects: Truck replacement program payment (funded from municipal budget), Burgess Field rehabilitation and dugout replacement, Willow Field rehabilitation and irrigation, a baseball and softball infield groomer, Deerfield Park tennis court renovation, Whipple Field renovations, and Whipple Field entrance and parking upgrades.</p>
Challenges	<ul style="list-style-type: none"> Department staff reported having to maintain old equipment that have exceeded useful life, rather than requesting new equipment. Department staff cannot currently track the resources used for maintenance and repair of equipment.
Opportunities for Improvement	<ul style="list-style-type: none"> The department would benefit from revenue derived from development impact fees, which could be utilized to fund park capital improvement projects. Implementing an asset management system for tracking parks resources, condition, maintenance, use of materials and equipment, and staff time would help improve efficiency of operations and assist in capital planning and budgeting.

3.0 Primary Challenges and Opportunities for Improvement

This section highlights the core challenges and opportunities initially identified. Themes were identified from interviews with Town leadership, department management, department staff, and stakeholders as well as insight gleaned from documentation and data reviews. This section is not inclusive of all challenges and opportunities identified, nor is it a complete representation of the best practices, opportunities, efficiencies, and implementation practices to be explored in the next phase of the project.

Through fact-finding activities, interviews with staff and stakeholders, and reviews of documentation and data, BerryDunn identified many challenges related to the current operational environments of DPW and Parks and Recreation. Table 3.0.1 below, identifies 10 primary challenges and improvement opportunities. The improvement opportunities listed below will provide the basis for further exploration related to best practices, benchmarking, and implementation to be documented in greater detail in the Priorities, Recommendations, and Implementation Strategies phase of the project.

Table 3.0.1: Primary Challenges and Opportunities for Improvement

Primary Challenges and Improvement Opportunities	
1	DPW currently has an aging workforce, with 75% of staff over 50 years of age and 50% over 60 years of age. Developing a succession plan to address impending staff retirements and the efficient backfilling of vacant positions will be vital for the department to sustain daily operations and help ensure service delivery continuity. Succession planning efforts may also be supported by performing a job description review and update—as well as a salary survey—led by HR.
2	Parks and Recreation and DPW do not currently operate a work order management system; therefore, daily workload volumes and task types are not captured and cannot be reported. Continued support of current efforts to implement Trimble Unity Asset Management system will provide the opportunity to develop and utilize a consistent work order system, allowing for the more efficient scheduling of tasks as well as the opportunity to track and analyze work order and workload data. The capturing and tracking of work order and workload data will assist the department of public works, initially, with assessing current staffing levels in relation to levels of service being provided.
3	Parks and Recreation and DPW do not currently report on any published performance metrics or key performance indicators (KPIs). Both departments would benefit from developing new core performance measures and using technology and systems, where possible, to improve data collection and reporting. This information could not only be used to report progress and outcomes to residents and stakeholders, but also to provide information to internal staff regarding their daily scheduling and completion of assigned tasks.

Primary Challenges and Improvement Opportunities	
4	DPW's current maintenance facilities are not adequate and need significant upgrades and repairs. The department should prioritize facility expansion/renovation projects to improve the workspace for staff and allow for safer, more efficient use of on-site facilities.
5	The SWSB is utilizing the Vision Government Solutions Billing system, which is not right-sized for operational needs in its current version (upgrades are in progress). The SWSB will benefit from completing the upgrades to this system. Updates may allow for more efficient access to data related to customer billing history, payment collections, usage trends and comparisons, and provide for more efficient customer interactions.
6	Parks and Recreation offers very few age- or activity-specific programming opportunities and lacks appropriate personnel to manage them. The department should continue to add the necessary resources to expand recreation programming and services, with a focus on activities for teens and community events initially.
7	Parks and Recreation lacks a system and the technology to manage recreation activities, participant registration, scheduling, or fees and charges. As programming expands, there will be a need for a system to manage and track programs, registrations, fees, and other key performance metrics related to recreation activities and programming.
8	Parks and Recreation does not provide any revenue-generating recreation activities or programs independently. As programming expands, it may be necessary to establish fees for certain types of activities, programs, services, and/or field and open space usage. Establishing a price for a program or service can be done through a variety of strategies. Arbitrary pricing is not encouraged because it is difficult to justify. Following a cost-recovery pricing approach is a best practice.
9	Parks and Recreation does not currently have a formal policy governing fees and charges for recreation activities, programs, or services. As programming expands, the department should consider developing a cost-recovery policy that formalizes a philosophy to generate revenue by charging fees for activities, programs, and services in relation to the total operational costs to provide them.
10	Parks and Recreation and DPW do not currently have any benchmarking data related to the fiscal environment or allocation of resources. Benchmarking information and/or peer comparison exercises related to funding and personnel levels can provide valuable insight into current workloads, demands, staffing levels, and resource allocation. Furthermore, benchmarking information and/or peer comparison exercises can help identify best practices and efficiencies that may be applicable and beneficial to department operations.

4.0 Next Steps

This section describes work to be performed in subsequent phases of the project and deliverables to be developed.

As the Town moves forward with the project, the next steps will involve a transition in focus from the current department environments to planning for future improvements and efficiencies. BerryDunn will facilitate a meeting to review the content of this memo with the Town’s project management team. Once the Town review is complete, BerryDunn will revise the memo and update its status to final. The next steps of the project are summarized in Table 4.1.1 and will include project participants’ continued involvement in the process.

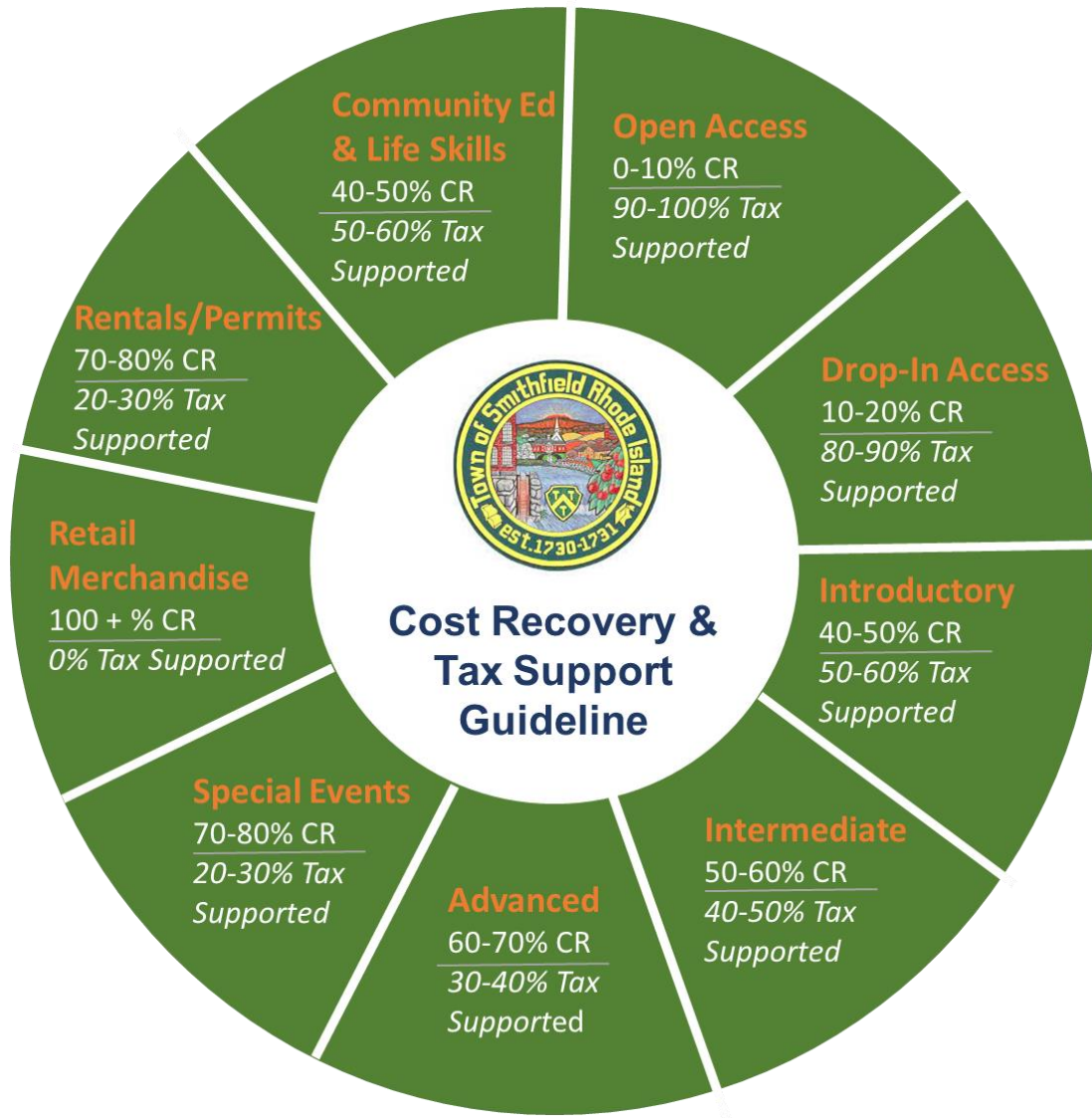
Table 2.1.1: Upcoming Tasks and Deliverables

Upcoming Tasks and Deliverables	
Review Final Draft Current Environment Overview Report With the Town Project Team	
Phase 2: Priorities, Recommendations, and Implementation	
D4. Best Practices, Priorities, Recommendations, and Implementation Strategies	February 2023
Phase 3: Draft Project Report Findings and Recommendations	
D5. Draft Organization and Operations Report	February 2023/March 2023
Phase 4: Final Project Report Findings and Recommendations	
D6. Final Organization and Operations Report	March 2023/April 2023
D7. Final Presentations	TBD



Appendix B: Sample Cost Recovery Guidelines

Figure A.B.1: Sample Cost Recovery Guidance for Recreation Pricing Development



Appendix C: P&R Recently Added and Future Services

Table A.C.1: P&R Recently Added and Planned Service Offerings

Events Offered Through P&R in the Past Year
Smithfield Youth Council (SYC) Scavenger Hunt – elementary school age
SYC Drop and Shop
SYC participation in Story Land
SYC Anti-Bullying Presentation – for high school parents (approximately 75 in attendance)
SYC Restructure
Walking Tours of Hanton City
Ski Trip to Nashoba Valley
Camp and Vendor Fair
Jedi Training for Youth (approximately 25-30 children participated)
Easter Egg Hunt and Bunny Appearance (approximately 200 children)
Comedy Bus (worked with Smithfield businesses and Comedy Bus to provide within town) (25/28 seats filled)
The Summer Music Series – 7 weeks of mixed music genres hosted as fundraiser to benefit Smith-Appleby House – sponsored (attendance varied weekly; approximately 150 people)
Intro to Pickleball (four sessions)
Events Planned Through P&R in Coming Year
SYC Car Wash Fundraiser
SYC on Recovery TV with Councilmember John Tassoni to discuss anti-bullying
SYC Halloween Event for Youth
SYC Drop and Shop (Fundraiser)
SYC Float Participant in All Lit-Up Parade
SYC Presentation (possible service tour in July 2024)
Meet with additional youth councils throughout the State
Opera in the Park (sponsored)
Intro to Pickleball Sessions to Continue
Walking Tours (2) of Hanton City with Tom D'Agostino
Double Feature Movie
Small-Scale Concert in Park
SafeSitter Course Offerings (2)



Day Trip to Martha's Vineyard
Ski Trip to Nashoba
Introduction of Memorial Tree Program (farm dependent) and Repurpose Trees with Trees for Trout Program

Appendix D: P&R Sample Performance Measures/KPIs²⁰

Table A.D.1: Sample Parks and Recreation Performance Measures/KPIs

Effectiveness Measures				
	Baseline	Current	Target	Notes
Operating expenditures per capita				
Revenue per capita				
Total revenue to total operating expenditures				
Total tax expenditures per capita				
Park operating expenditures per acre of parkland				
Operating expenditures per acre of parkland				
Operating expenditures per acres of parks and non-park sites				
Operating expenditures per FTE				
FTE's per 1,000 population				
Acres of parks per 1,000 residents				
Number of residents per park				
Number of acres per park				
Number of participants per program				
Ratio of fee programs to all programs				
Ratio of building attendance to park attendance				
Operating Budget				
	Baseline	Current	Target	Notes
Total annual operating expenditures				

²⁰ Sample of the most common parks and recreation performance metrics utilized. As reported in the "NRPA 2021 Agency Performance Review," <www.nrpaparkmetrics.com>



Percentage of total operating expenditures for the following categories: <i>Parks</i> <i>Recreation</i> <i>Other</i>				
Percentage of agency's total operating expenditures for the following categories: <i>Personnel services</i> <i>Operating expenses</i> <i>Capital expense not in CIP</i> <i>Other</i>				
Total annual non-tax revenues				
Capital Budget				
	Baseline	Current	Target	Notes
Five-year capital budget spending				
Targets for capital expenditures				
Value of deferred maintenance projects per agency				
Workload				
	Baseline	Current	Target	Notes
Total number of parks				
Total park acres				
Total number of non-park sites				
Total acres of non-park sites				
Number of acres of developed open space for which the department has management responsibility or maintains				
Total number of trail miles managed or maintained by the department				
Number of programs offered annually and the number of participants				
Number of fee-based programs				
Number of partnerships				

Appendix E: DPW Sample Performance Measures/KPIs

Table A.E.1: Sample Public Works Performance Measures/KPIs

DPW Draft Performance Measures/KPIs				
Highway/Sidewalk				
	Baseline	Current	Target	Notes
Asphalt installed (tons)				
Percentage of roadway pavement treatment				
Percentage of roadway pavement reconstruction				
Service calls responded to				
Number of sidewalk, curb, and gutter sites replaced				
Number of displaced sidewalk sites serviced and percent temporarily ramp patched within five working days of notification				
Concrete sidewalks placed (cu. yards)				
Number of lane-miles swept in FY				
Street cleaning (tons)				
Number of stormwater catch basins/inlets inspected/cleaned (% of total)				
Percentage of respondents satisfied or very satisfied with the maintenance level and condition of streets/highways				
Percentage of respondents satisfied or very satisfied with the maintenance level and condition of streets/highways				
Fleet				
	Baseline	Current	Target	Notes
Number of autos and light trucks maintained in City fleet				
Number of special purpose trucks, tractors and trailers maintained in City fleet				

DPW Draft Performance Measures/KPIs				
Number of small equipment and auxiliary power generator items maintained in City fleet				
Percentage of operating time that City vehicles and equipment are available for department usage (also known as uptime)				
Complete a minimum of 95% of scheduled preventive maintenance services on vehicles in the month scheduled				
SWSB				
	Baseline	Current	Target	Notes
Water demand (MGD)				
90% of all broken water mains are restored to service within eight hours of notification. % met/target Repairs made				
Number of service responses				
Water mains replaced (l.f.)				
Hydrants repaired/replaced				
Refuse and Recycling				
	Baseline	Current	Target	Notes
Number of route audits conducted in the FY				
Number of educational events facilitated in the FY				
Waste diversion percent				
Collection/disposal cost per ton				
Composting tons				
Number of commercial refuse establishments				
Snow and Ice				
	Baseline	Current	Target	Notes
Number of snow and ice events responded to in the FY				
Amount of accumulation (per event) and season total				



DPW Draft Performance Measures/KPIs				
Percentage of respondents satisfied or very satisfied with snow removal efforts on streets/highways				