



**NEWS RELEASE  
FOR IMMEDIATE RELEASE**

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**PRELIMINARY OBSERVATIONS AND RECOMMENDATIONS – ADMINISTRATIVE  
ORGANIZATION AND OPERATIONAL ASSESSMENT**

**PURCELLVILLE, Va. — OCTOBER 17, 2018** — On October 12, 2018, the Town issued a News Release inviting the public to engage in two community meetings to provide input for the Town’s administrative organization and operational assessment. The meetings will be held on Monday, October 22<sup>nd</sup> at 11:30 AM and at 6:30 PM at Town Hall. If you have not already done so and would like to attend, please RSVP to Diana Hays, Town Clerk at [dhays@purcellvilleva.gov](mailto:dhays@purcellvilleva.gov) or by phone at 540-751-2334.

The October 12 News Release also referenced the progress to date. Since the initiation of the assessment, the consultants have conducted meetings with nearly 50 of our 83 total employees. These meetings garnered input from 21 individuals and 8 focus groups within various departments, the Town Manager, management team and the Town Council. At this time, the consultants are analyzing policies, procedures and data. Upon completion of the community meetings, the data received will be analyzed and included in the final report to Council, during a public meeting, later this year.

At the end of September, members of Town Council met individually with the consultant. At this time, they were presented preliminary observations and recommendations which are attached to this News Release. Please note that these observations and recommendations are very preliminary and do not reflect a full analysis nor the community input that will be collected in next week’s community engagement meetings. The Council’s goal for the organization and operational assessment is to optimize the efficiency and effectiveness of all departments to ensure the highest level of service delivery at the lowest cost to the taxpayers.

**The Town of Purcellville, Virginia**

Purcellville is an award-winning town of over 9,000 residents located in Loudoun County, approximately 40 miles west of Washington, DC. Having received the prestigious Siemens Sustainability Award for Small Communities, Purcellville continues to be honored for its green initiatives with most recently being the Tree City USA recipient for the 10th year. The Town was reaffirmed as a AAA rated community by S&P Global Ratings, the highest credit rating possible, and is recognized as one of the safest towns in Virginia. Once a stop along the W&OD rail line, Purcellville has maintained its historic old-town feel through the restoration and maintenance of its many downtown structures, reflecting the Victorian architecture popular during the early 1900s. Today, Purcellville is the economic hub of western Loudoun County and a popular weekend destination for antiquing, entertainment, farmer’s markets, wineries, breweries, distilleries and restaurants. More info at [www.purcellvilleva.gov](http://www.purcellvilleva.gov).

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# Town of Purcellville

## Organizational Assessment

*Preliminary Observations and Recommendations*

September 27, 2018

## Agenda

- Project Overview
- Work Completed to Date
- Preliminary Observations and Recommendations
  - Town-Wide
  - By Department/Major Function
- Next Steps

# Project Overview

## Project Overview

- **Conduct a Town-wide organizational assessment**
  - Review structure, operations, policies, processes, and staffing levels
  - Recommend improvements to enhance efficiency and effectiveness

## Work Completed to Date

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- Met with each member of the Town Council
- Conducted interviews with nearly 50 staff members
  - Including 21 individual interviews and 8 focus groups
- Toured Town facilities
- Requested data/information and initiated analysis

# Preliminary Observations and Recommendations

## Town-Wide

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### Strengths

- Dedicated staff
- Lean organization

### Opportunities

- Engage in strategic planning
- Develop work plans aligned with strategic direction
- Formalize roles and responsibilities of Council and staff

- Develop a Town-wide strategic plan
  - Define policy areas, goals, and projects that are important to Council
- Create annual work plans based on the Town-wide strategic plan
  - Translate strategic goals into specific initiatives and projects
  - Prioritize projects to more efficiently and strategically manage staff capacity

- Formalize an internal communications policy
  - Ensure Council has access to the information it needs to make informed policy decisions as a governing body
  - Outline the roles and working relationships between Council and staff
  - Describe how complaints, requests, and other issues should be communicated from Council to staff

# Preliminary Observations and Recommendations

By Town Function

# Administration and Town Attorney

### Strengths

- Staff are cross-trained to perform multiple functions

### Opportunities

- Expand the roles and responsibilities of existing support personnel
- Improve records management procedures
- Implement a customer request management process

- Train staff on the records retention policy and Laserfiche
- Expand internal support role of front desk staff to include:
  - Administrative support
  - Munis and Laserfiche assistance for staff
- Create paralegal position to increase Town Attorney capacity
  - Assign paralegal to address current backlog involving ordinance and policy review as well as other high-level projects

# Finance

### Strengths

- Town has a high credit rating
- Effective Munis implementation

### Opportunities

- Expand efficacy of budget and purchasing support processes
- Build on the implementation of core Munis functions

- Create a full-time position to support budget and procurement functions
  - Integral processes are each managed by only a part-time staff person
  - Options for full-time position include combining the two part-time positions into a full-time or expanding one position into full-time
- Update the Water and Wastewater Fund chargeback model
  - Use data whenever possible to tie chargebacks to actual costs
  - Recoup overhead costs in Finance, IT, HR, etc.

- Update the payroll system
  - Use Munis instead of Cobalt to tie everything into one system
  - Staff should input their time directly into Munis
- Implement a contract management process
  - Lack of central location makes it difficult to research contract and vendor history
  - Implementing a Munis contract management module to integrate contracts into the financial system

# Community Development

## Community Development

### Strengths

- Reportedly, rapid turnaround times for some permits
  - E.g., deck/fence permits issued within 48 hours
- Staff strive to successfully resolve code violations
- Currently updating Town's comprehensive plan

### Opportunities

- Leverage technology more effectively
- Define economic development expectations
- Streamline operations and services

- Issue an RFP for permit tracking software
  - Eliminate paper-based processes and enhance data tracking capabilities
  - Leverage Munis or partner with Loudoun County
- Develop a cohesive economic development strategy
  - Clarify Council goals for business attraction, retention, expansion
  - What role does Council want staff to play?

- Create an additional Permit Technician position
  - Provide additional coverage at customer service window
  - Responsible for basic completeness checks for planning submittals
  - Creates capacity for Permit Technicians to perform other specialized work

# Human Resources

## Human Resources

### Strengths

- Hired more than 50 personnel over the last five years
- HR utilizes Town intranet to distribute information to employees

### Opportunities

- Clarify HR's role
- Improve policy development
- Enhance technology usage
- Develop training programs

- Elevate the role of the HR Manager in senior staff discussions
  - Reporting relationships among HR Manager, Town Manager, and Director of Administration are unclear
  - Appropriate for HR Manager to report to Director of Administration
  - However, HR Manager should be engaged in executive level personnel policy issues

- Revise and update existing HR policies
  - Policy manual was last revised in 2005
  - Policies reportedly conflict and do not address current needs
- Implement the Munis HR module
  - Need to centralize records and eliminate paper-based processes
  - Opportunity to revise existing processes and reduce process times

- Develop a comprehensive management training program
  - Engage Loudoun County to provide management/supervisory training to Town staff
- Conduct a compensation and classification study
  - 44 personnel have left the Town since FY2015 (56% turnover rate)
  - Continued growth creates wage pressures
  - Opportunity to evaluate the competitiveness of pay structures

## Information Technology

### Strengths

- Highly responsive to customer support needs
- Appropriate use of outside contractors (e.g., for Munis-related work)

### Opportunities

- Formalize existing strategic planning efforts
- Strengthen IT governance

- Update the IT strategic plan to reflect the Town-wide strategic plan
  - Current IT strategic plan contains a list of potential projects
  - Opportunity to expand this plan, align with Town goals, and formally adopt by Council
- Create a Technology Advisory Committee (TAC)
  - TAC is a best practice for prioritizing IT projects and evaluating potential policies
  - Should consist of representatives from each department

# Parks and Recreation

## Parks and Recreation

### Strengths

- Staff coordinate a multitude of special events
- Reportedly strong relationships with volunteers

### Opportunities

- Define clear service level expectations

- Define and formalize service level expectations associated with parks and recreation functions
  - Staff largely focus on special events and volunteer recruitment for trail maintenance
  - What services does Council expect Parks and Recreation staff to provide?
  - Formulate work plans and adjust staffing based on Council's service expectations

## Public Works

### Strengths

- Equipment and facilities in good condition
- Planned water rate study to address future needs

### Opportunities

- Build staff cohesion across units
- Implement asset management linked to capital planning
- Complete water meter installation

- TNCG is evaluating management structure and staffing needs
  - Analysis ongoing
- Update job descriptions to clarify responsibilities
  - Engineering Inspector/Maintenance staff primarily function as inspectors
- Build internal cohesion through training and all-staff meetings

- Implement an asset management program
  - Account for condition assessment, probability of failure, and risk
- Develop annual work plans
  - Based on asset management needs
  - Utilize to triage and prioritize service requests

- Develop a plan to ensure future water security
  - Expand available water sources
- Expand advanced metering infrastructure implementation
  - Conduct a propagation study to determine where meter investments are needed
- Conduct the planned water rate study
  - TNCG evaluating options for simplifying rate structure

## Next Steps

## Next Steps

- Conduct additional research and analysis pending receipt of outstanding data requests
- Schedule and conduct community meetings in the Fall
- Finalize recommendations
- Draft report



What questions do you have?

**Thank you!**

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