

**MOUNTAIN BROOK CITY COUNCIL
PRE-MEETING DISCUSSION
AUGUST 25, 2014**

The City Council of the City of Mountain Brook, Alabama met in public session in the Pre-council Room (A106) of City Hall at 6:15 p.m. on Monday, the 25th day of August, 2014. The Council President Pro Tempore called the meeting to order and the roll was called with the following results:

Present: Amy G. Carter, Council President Pro Tempore
William S. Pritchard, III
Jesse S. Vogtle, Jr.
Jack D. Carl
Lawrence T. Oden, Mayor

Absent: Virginia C. Smith, Council President

Also present were City Attorney Whit Colvin, City Manager Sam Gaston, and City Clerk Steven Boone.

1. AGENDA

1. One-time pension benefit payment for RSA and CIGNA retirees. (Resolution Nos. 2014-106, 107, 108, and 109 were added to the formal agenda.)
2. Parks and Recreation organizational and staffing study presentation – Steve Eagan of The Mercer Group (Appendix 1).
3. Expungement Law update – Steve Shaw.
4. Review and discussion of the issues to be considered at the 7 p.m. meeting.

Upon conclusion of the City Council's review of the other formal [7 p.m.] agenda issues, Council President Pro Tempore Carter adjourned the meeting.



Steven Boone, City Clerk



The Mercer Group, Inc.

Consultants to Management

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**CITY OF MOUNTAIN BROOK,
ALABAMA**

**MANAGEMENT AND ORGANIZATIONAL STUDY
OF THE
PARKS AND RECREATION DEPARTMENT**

DRAFT REPORT

June 4, 2014

Mr. Sam Gaston
City Manager
56 Church Street
Mountain Brook, Alabama 35213

Ms. Shanda Williams
Parks & Recreation Superintendent
3698 Bethune Drive
Mountain Brook, Alabama 35223

Dear Mr. Gaston and Ms. Williams:

The Mercer Group, Inc. is pleased to present our Draft Report for the Management and Organizational Study (the Management Study) of the Parks & Recreation Department.

OVERVIEW OF THE REPORT

Our report is based on our proposal of September 1, 2013 and is presented in the following ten chapters. Because Parks & Recreation (Parks) is smaller than Public Works, we are organizing the Parks report by functions instead of by divisions as in the Public Works report. Each chapter presents findings, analyses, and recommendations relating to that chapter's topics.

- I. Overview of the Project
- II. Current Situation
- III. Parks & Recreation Assessment
- IV. Implementation
- V. Exhibits

APPENDIX I

CITY OF MOUNTAIN BROOK, ALABAMA

**MANAGEMENT AND ORGANIZATIONAL STUDY
OF THE
PARKS AND RECREATION DEPARTMENT**

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City of Mountain Brook, Alabama
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OVERALL ASSESSMENT OF THE DEPARTMENT

The Department of Parks & Recreation is providing a high level of service to the City of Mountain Brook and its residents. Management and employees are committed to meeting the expectations of the Mayor and City Council, the Park Board, the City Manager, strategic partners (such as Mountain Brook Schools and several athletic associations), and Mountain Brook residents. Parks staff is knowledgeable, hard-working, and cohesive. With a new Superintendent, management practices and philosophy will be changing (and are improving per staff interviews) as in the Department of Public Works.

Key Strengths

- > An energetic and cohesive Park Board
- > Quality and quantity of resources and work performed by Parks staff
- > Knowledgeable and experienced employees
- > The new Parks Superintendent
- > A new facility and good equipment, with a couple of exceptions

Key Weaknesses

- > The strategic direction of the department and its programs, as well as those of strategic partners (e.g., MB Athletics) is not clearly and formally defined
- > Strategic partners in delivering recreation services operate VERY independently with little collaboration about service delivery options
- > Staffing levels (before a position was added to the budget)
- > Lack a formal maintenance management system with few performance, activity, and cost of service measures and reports
- > Lack an asset management system with inventories of and condition assessments for public infrastructure

Key Opportunities

- > New approach to managing and operations with the new Superintendent
- > GIS, asset and maintenance management, and other technology applications already available in the City
- > New approaches to delivering services (higher standards, cross-utilization, employee development, technology application, contracting vs. in-house, collaboration)

Key Threats

- > Emergencies like tornadoes and bad storms
- > Not filling vacant positions or cuts to current staffing levels

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KEY FINDINGS AND RECOMMENDATIONS

The Mountain Brook Parks & Recreation Department is an effective steward of the City's parks and recreation infrastructure and is extremely responsive to the expectations of elected officials and citizens, particularly in terms of parks appearance and field conditions.

Parks' satisfaction scores from the 2014 Citizen Survey conducted by the ETC Institute were very high (90% of respondents scored 4 or 5 on a 5-point scale where 5 is "very satisfied") compared to an average score of 71% for the comparative group of 53 communities. Parks' scores for six parks-specific questions also were very high (76% to 94% scored 4 or 5 vs. 62% to 77% in other communities).

Scores on the Mercer surveys were very high compared to other clients and to 2003 Parks & Recreation results. See Chapter II and Exhibit 3-6 in Chapter V for details. The Values Survey, however, indicates the need to work on and communicate departmental values.

Our report, therefore, recommends fine-tuning and expansion of what is in place and evolving with a relatively new Superintendent.

Key recommendations are:

- 1.) **Governance:** Parks Board members are well-qualified and committed to parks and recreation services. The Board operates cohesively as an effective advisor to the Mayor and City Council, the City Manager, and to the Parks Superintendent.

Create a single "Friends of the Parks" organization (a committee or foundation) to raise funds for special needs. This group would subsume a relatively inactive "Friends of Jimison Park." The City has a long history of champions rising up to generate public interest and funds for projects like the Crestline Tot Lot. This group would formalize this championing process.

- 2.) **Strategic Direction:** Review the department's values to confirm employee understanding and buy-in, as well as develop mission-supporting goals, objectives, and performance measures to ensure City officials have a full understanding of the return on their investment in Parks & Recreation staff and other resources.

Create a Functional Business Plan for the department to document these and other strategic elements. The plan would connect to the recommended *Parks & Recreation Plan*, which would serve as a long-range needs assessment relating to infrastructure and recreational services.

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- 3.) **Services Delivery Structure:** Continue to review the mix of in-house and contracted services using Mercer's *Decision Criteria for Contracting and Collaboration*. The current mix of service providers is reasonable compared to other communities and industry best practices.

Create a coordinating body, perhaps called the *Mountain Brook Parks & Recreation Coordinating Council*, to ensure all parties involved in serving the community are collaborating optimally and that all identified community needs are met.

- 4.) **Organization and Staffing:** Continue the current organization plan as shown on Exhibit I. We support creation of the Odd Jobs crew, funding of the 16th position, and adding a 17th position if the Parks Board and Mayor and City Council approve higher standards for parks and islands. The 17th position would be added to the Route Crew.

We understand the Parks Crew Labor Supervisor position will be reviewed by the Jefferson County Personnel Board. Our analysis of the responsibilities of the Parks, Route, and Complex Labor Supervisors do not find a distinct difference in duties, staff to supervisor, or areas of responsibility. Perhaps all three positions should be reviewed?

We like the practice of rotating crews between the Route and Complex Crews, and suggest it be expanded to include the Parks Crew. This change expands cross-utilization possibilities across the department.

- 5.) **Operations Management:** As in Public Works, we support improvements in operational recordkeeping and reporting to better "manage the numbers," which total over 22,000 available work hours for 14 field employees (at 1,600 working hours each year). Parks may need an Asset Management Information System to accomplish this objective.

Continue current scheduling and work day practices, which seem highly effective, but tighten the lunch period protocol through better routing to save travel time to/from the yard both at lunch time and at the end of the day.

- 6.) **Resource Management:** Review equipment and tool needs for the next budget cycle. Continue the practice of the Odd Job Crew maintaining equipment, but ensure small engine mechanics are certified.

Invest in enhancements at certain parks where amenities are aging and identify future needs through the *Parks & Recreation Master Plan*.

With the development of Parks Functional Business Plan and better work/cost data from "managing the numbers," add a return on investment element to the budget process.

Develop an Absence Policy to limit morning call-ins.

Mr. Sam Gaston, City Manager
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NEXT STEPS

The next step in the study process is to review the Draft Report with you two then create an updated draft for the Project Steering Committee, the Parks Board, and Parks & Recreation staff (at a highlight level).

Then, once we determine corrections, clarifications, and edits, we will prepare a final report and make a Final Presentation to the Mayor and City Council, the Parks Board, and Parks employees.

After the presentation, the City and Parks need to review and fine-tune, then follow the Implementation Plan described in Chapter IV and on Exhibit 9 to ensure recommendations in the Mercer study are fully implemented.

If you have any questions or require additional information regarding our proposal, please call Steve Egan, our project manager and lead consultant, at 770-425-1775.

Very truly yours,

The Mercer Group, Inc.

THE MERCER GROUP, INC.
James L. Mercer, President and CEO (Project Director)
Stephen D. Egan, Jr., Senior Vice-President (Project Manager and Lead Consultant)

APPENDIX I

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Mercer Issues

Mercer's *Fifty Management Issues for Organizational Improvement*, which are at the core of all of our management and operations reviews, also were reviewed and assessed in this study.

Governance

1. Legal structure/form of government
2. Role of governing and advisory boards and committees
3. Staff support to these boards and committees
4. Policy making and decision making processes
5. Identification of and compliance with legal, regulatory, and policy requirements

Service Delivery Structure

6. Organizational location of services and activities both in and outside the city
7. Interdepartmental cooperation among city government departments
8. Intergovernmental cooperation across the region
9. Use of alternative service delivery opportunities, such as inter-local agreements, contracts, and privatization
10. Comparison with industry best practices, benchmark communities, and Mercer's national experience

Planning

11. Strategic planning process compared to the Mercer Model
12. Alignment of vision, mission, strategies, long-term goals, and short-term objectives (as they impact services levels, organization, and staffing)
13. Capital projects planning process, documents, and oversight
14. Financial planning and budgeting processes, documents, and oversight
15. Operational planning processes, documents, and oversight

Management

16. Senior management organization structure
17. Internal workings of the management team
18. Management reporting and communications
19. Documentation of policies and procedures
20. Customer and stakeholder relations and communications
21. Organizational culture and values (as they impact organization and staffing)
22. Management philosophy and labor-management relations (as they impact organization and staffing)

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Draft Management Study of the Mountain Brook Parks & Recreation Department (6/4/2014) 2

I. OVERVIEW OF THE PROJECT

This chapter of the report describes the project's purpose, objectives, scope, issues, deliverables, and schedule.

A. SCOPE OF THE PROJECT

Similar to many well-run cities, Mountain Brook is concerned about the level of services provided to its citizens and the resources required to deliver these services.

With a new Parks Superintendent and value received from a prior study in Public Works, the City believes this is a good time for an independent, objective review of the management, organization, and operations of the Parks & Recreation Department (Parks or the Parks Department).

Issues to be studied are a combination of the issues that Mercer reviews in our comprehensive Management and Operations studies, as well as issues of primary concern to the City of Mountain Brook.

City Issues

In our telephone conversation with the City Manager and initial meeting with the Project Steering Committee, we identified the following key City Issues to be reviewed in the study:

1. **Organizational Culture:** Is workforce morale, cohesion, and teamwork high? (See Chapter II, Current Situation)
2. **Organization:** Does the organizational plan include appropriate spans of control, organizational levels, functional groupings, reporting relationships, and communications. (See Chapter VI, Organization and Staffing)
3. **Staffing:** Are staffing levels adequate compared to objective standards of workload and responsibilities assigned? Does Parks need for a Parks Maintenance Supervisor position. (See Chapter VI, Organization and Staffing)
4. **Operations:** Are operational policies, procedures, and practices fully defined and implemented? Are these adequate for the Cahaba River Park and maintenance of islands. Can Parks keep up with work assigned? (See Chapter VII, Operations Management)
5. **Facilities and Equipment:** Are there enough fields? What is the impact of a growing Lacrosse league on field availability? Is equipment adequate? What about sharing a bucket truck with Public Works? (See Chapter VIII, Resource Management)

Operations Management

23. Work standards and specifications
24. Work planning and scheduling
25. Unit and crew organization and staffing
26. Job classifications, roles, and duties
27. Adequacy of facilities, equipment, tools, technology, communications, and materials
28. Unit and crew supervision
29. Unit and crew operations, work flow, productivity, and cost-effectiveness
30. Yard, technical support, and administrative support operations
31. Activity and performance reporting and analysis
32. Emergency management plans and processes

Resource Management

33. Human Resource management policies, practices, and processes
34. Training and career development program
35. Safety and risk management program
36. Employee and labor relations
37. Financial management and reporting
38. Financial transactions and processes
39. Project and activity cost accounting
40. Rates, fees, charges, and cost recovery practices
41. Internal service fund operations and charges
42. Information systems management and support services
43. Computer and technology applications (hardware and software)
44. Records management, including documents, mapping, and GIS
45. Purchasing and materials management
46. Warehouse and stores operations
47. Facilities management
48. Facility and grounds maintenance operations
49. Fleet and equipment management
50. Equipment specifications, procurement, and replacement

We also reviewed city and department-level issues based on the *Mercer Model for Managing in Lean Times*. Key issues and challenges reviewed are:

- 1.) **Strategic Direction:** Although many governments have "strategies, goals, and objectives," many lack a full-scope strategic plan based on the Mercer Model, and many more fail to carry down the government-wide plan to department/program-level "functional business plans." Often, therefore, the work of departments and employees is not aligned with the government's vision, strategies, and goals, and the various planning processes lack cohesion.
- 2.) **Service Delivery Structure:** Service delivery alternatives range from full consolidations (City-County or City-City/Town) to functional consolidations (Fire or Utilities) to collaboration or contracting for specific services (911 Center or solid waste) to consentition in funding social services or the arts. Mercer's *Decision Criteria for Contracting* (see Attachment C) can assist in determining what options might work in specific circumstances.
- 3.) **Organization and Staffing Plans:** Do decisions for the Strategic Direction and Service Delivery Structure result in a mission-driven organization and staffing plan? Are the right people in place to manage the organization and to cost-effectively deliver services?
- 4.) **Operations and Productivity Improvement:** The performance measurement movement is one of many ways to ensure local government operations are productive. But, in addition, governments need ways to assess and monitor the day-to-day and hour-to-hour operational efficiency of staff, units, and programs. We call this "*Managing the Numbers!*"
- 5.) **Budget and Financial Management:** Although it is hard to raise taxes, charges, and utility fees in economic hard time, local governments can implement performance-based and other budgetary processes to ensure departments and programs are accomplishing government-defined goals and objectives, operating efficiently and effectively, and giving a solid return on the government's investment in people, facilities, equipment, and other resources.
- 6.) **People Management:** Key needs for every government are to retain good employees and develop new hires and lower performers. The structure and application of pay plans (including performance-based rewards), benefits packages, organizational development and training programs, performance evaluations, and the like can bring employees to higher levels of performance and limit turnover and the attendant costs to hire, train, and retain good employees.
- 7.) **Technology Investments:** For years, central administrative departments have invested in resource management systems and public works/utilities in technology to manage field operations, plants, and facilities. Other government programs have not necessarily followed that trend to apply Asset and Work Management Systems, GIS, GPS units on vehicles, and hand-held field data recorders. A strategic approach is needed to optimize these resources and select reliable software and hardware vendors.

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B. PROJECT ACTIVITIES

The Project started in December 2013 and required about six months to complete as we were concurrently doing a study of the Emmet O'Neal Library. Project activities included:

- ▶ Interviews with city officials, members of the Parks & Recreation Board (Parks Board), stakeholders (Mountain Brook Schools, athletic associations), support department directors, and Parks employees to gain an understanding of the City and of the department;
- ▶ Review of city and Parks-related documents and reports; and
- ▶ Application of Mercer surveys and questionnaires that were completed by fourteen Parks employees.

The detailed project schedule by task and subtasks, with time frames and milestones, is presented in Chapter III of our proposal. The schedule provided time for:

- ▶ A Kickoff meeting with the Project Steering Committee.
- ▶ Parks staff to complete questionnaires and surveys.
- ▶ On-site interviews, site visits, and observation of work.
- ▶ Data collection, research, and benchmarking.
- ▶ Analysis of information and data collected during the study, development of preliminary findings and alternatives, and preparation of a draft report.
- ▶ Project and status reports.
- ▶ Review of the draft report with the Project Steering Committee, along with a presentation to the Parks and Recreation Board and Parks employees.
- ▶ Preparation of a final report, followed by a final presentation to the Mayor and City Council and to the Parks Board.

The consultant was responsible for the following deliverables:

- ▶ **Interim Status Reports:** These informal reports to the City Manager and Parks Superintendent, as well as a short presentation to the Parks Board, were delivered at key project milestones defined at the project kickoff meeting.
- ▶ **Draft and Final Reports:** We prepared Draft and Final Reports for the project, which detailed our findings, recommendations, and implementation plan.
- ▶ **Presentation:** Presentations to the Mayor and City Council and to the Parks Board were made at the conclusion of the project.

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II. CURRENT SITUATION

This chapter of the report describes the City of Mountain Brook; documents the services and resources of the Parks & Recreation Department; and reviews the results of interviews, surveys, and questionnaires applied in the Management Study of the department.

A. CITY OF MOUNTAIN BROOK

The City of Mountain Brook is a primarily residential community and a suburb of Birmingham. Mountain Brook had a population of 20,413 as of the 2010 Census and 20,369 as of a 2012 estimate, with relatively slow, controlled growth. The City is noted for the quality of life and the excellence of its school system, parks, and recreation programs.

The city was incorporated in 1942 and is governed by a Mayor and five-member City Council, which appoints a City Manager to run daily operations.

The City's mission is to be "a professional organization committed to teamwork and excellence which promotes full participation in enhancing the quality of life for residents."

Key city values are Integrity, Safety, Education, Community, Stewardship, and Beauty.

For Fiscal Year 2014, the City employs about 225 people and has an annual all funds budget (including capital projects) of \$39,158,179. Budgets for major funds are:

▶ General Fund:	\$32,065,367
▶ Capital Projects Fund:	\$ 2,030,848
▶ Parks Board Fund:	\$ 114,300 (net of the city's General Fund contribution)

As a full service community, city departments include Police, Fire, Parks & Recreation, Finance and Administrative Services, Public Works, Inspections, and Planning.

A Library Board governs the Emmet O'Neal Library in Crestline Village with day-to-day management by the Library Director who reports to the Board.

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B. DEPARTMENT OF PARKS & RECREATION

Services

The staff, strategic partners, and contractors of the Parks and Recreation Department provide a range of services for city residents and businesses, including, but not limited to:

- ▶ Administration
- ▶ Capital improvements planning
- ▶ Construction projects
- ▶ Field maintenance, including dugouts, fences, and scoreboards
- ▶ Turf maintenance
- ▶ Park maintenance
- ▶ Building maintenance
- ▶ Grounds maintenance
- ▶ Playground equipment maintenance
- ▶ Small Engine equipment maintenance
- ▶ Youth recreation programs

Several operating and support services are provided by other governments, non-profit associations, and contractors:

- ▶ **Maintenance:** Contracted maintenance services include:
 - Field lights
 - Field lighting effectiveness study
 - Major construction projects
 - Pest control
 - Security guard
 - Trades (as needed)
- ▶ **Recreation:** Recreational services are delivered by several non-profit athletic associations or private organizations, including:
 - Mountain Brook Athletics
 - Mountain Brook Soccer
 - Mountain Brook Lacrosse
 - Mountain Brook Gymnastics
 - Traveling teams
 - Private gyms and exercise facilities
 - Country Clubs

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Resources

Budget

The FY 2014 budget provides \$1,160,470 in operating funds for the Department of Parks & Recreation. Special Projects, funded by the General and Capital Improvements funds, add \$554,250 for improvements at Calaba River Parks and Improvements at various parks.

Revenue sources and the number of employees are shown on Table 1 and expenditures categories and capital projects on Table 2.

Table 1
Overall Budgets for FY 2012, 2013, 2014

Revenue Categories	FY 2012 Actual	FY 2013 Projected	FY 2014 Budget	Share of 14 Budget
Transfer from General Fund	\$937,186	\$1,015,980	\$996,190	89.7%
Association Fees	62,938	66,600	66,600	6.0%
Board of Education Fees	43,571	44,700	44,700	4.0%
Interest	12,215	639	0	0.0%
Miscellaneous	4,435	3,108	3,000	.3%
Donations	125	3,518	0	0.0%
TOTAL: Actual or Budget	\$1,060,470	\$1,134,545	\$1,110,490	100.0%
EMPLOYEES: Full-time and Seasonal	16 FT 4 Seasonal	16 FT 4 Seasonal	15 FT 4 Seasonal	

Table 2
Overall Budgets for FY 2012, 2013, 2014

Expenditure Categories	FY 2012 Actual	FY 2013 Projected	FY 2014 Budget	Share of Budget
Personnel (Salaries, Overtime, Benefits, Staff Development)	\$707,267	\$703,174	\$739,030	66.5%+
Supplies and Expenses	80,511	62,341	71,000	6.4%
Contract Services	24,367	17,978	21,600	1.9%
Repairs & Maintenance	76,097	74,717	84,600	7.6%
Utilities and Communications	62,703	61,200	60,600	5.5%
Special Projects	95,972	75,750	750	.1%
Equipment Replacement	121,480	139,385	132,910	12.0%
Transfer				
TOTAL: Actual or Budget	\$1,168,397	\$1,134,545	\$1,110,490	100.0%
CHANGE: Year-to-Year		-2.9%	-2.1%	

Parks and Facilities

The Parks Department operates out of a new compound tucked at the back/bottom of the Mountain Brook Sports Complex with access to I-459 via a rear access road and the City via the high school. Parks shares the area with Mountain Brook High School and the Gymnastics facility. The Parks operations facility includes an operations building (office, shop, and indoor storage), parking lot, outside equipment storage sheds, and materials storage areas.

Other parks and recreation facilities include the following sites that total about 110 acres:

- Cababa River Park: 4.7 acre linear park is under development.
- Canterbury Park: .6 acre park with a playground and picnic tables.
- Crestline Tot Lot: A .4 acre pocket park with playground equipment for young kids.
- Irondale Furnace Park: 9 acre park with a walking trail and historical feature.
- Jemison Park: 54 acre linear park and greenway with .6 mile walking trail.
- Mountain Brook Athletic Complex: 10-acre facility wrapping around the high schools includes six baseball/softball fields, three soccer fields, six tennis courts, a children's playground, concession stand, and restroom facilities.
- Mountain Brook Presbyterian Church: 1.7 acre park with a .7-mile public walking trail that circles the church.
- Overton Park: A 3.1 acre park (with the Chabad Center) has a playground, rest rooms, walking path, lawn, tennis and basketball courts, and a pavilion available for rental.
- Rathmell Sports Park: This complex has six soccer/lacrosse fields, a concession area, and rest room facility. In cooperation with the city, the complex was developed and is operated and maintained by the Mountain Brook Sports Foundation (a partnership of soccer and lacrosse organizations).
- School Sports Fields: Parks maintains 12.8 acres of sports fields at Brookwood Elementary School, Mountain Brook Elementary School, Mountain Brook Junior High School, Crestline Elementary School, and Cherokee Bend Elementary School.
- Trails and Sidewalks: A growing network connects the three villages and Jemison Park.
- Traffic Islands and Other Locations: 113 locations across the city totaling 5.51 acres. Of these locations, 100 are independent of City parks, mostly traffic islands.

Staffing

Exhibits 1 in Chapter V show the most current Organization and Staffing Chart for the department. The current plan shows a total of 16 positions assigned to major functions and crews as detailed below.

The Superintendent reports to the City Manager and advises the Parks Board. The Superintendent is appointed by the City Manager.

Budgeted positions assigned to each organizational unit are identified below. Positions on the most recent organization and staffing chart may be used slightly differently than implied by the chart. Exceptions or recent changes are noted below.

- Administration (2): Superintendent and Office Manager
- Complex Crew (4): Labor Supervisor and Laborer (3 with new position for the spring/summer sports season)
- Odd Job Crew (2): Skilled Laborer (2)
Note that two Skilled Laborers were recently moved from the Complex Crew to an Odd Jobs Crew under the direction of the Superintendent and supporting all other crews
- Turf Crew (3): Turf Grass Supervisor, Skilled Laborer, and Laborer
- Route Crew (2): Labor Supervisor and Laborer
- Parks Crew (3): Labor Supervisor, Skilled Laborer, and Laborer

Budgeted positions by position title are listed below. The Skilled Laborer and Laborer positions are classified by the Jefferson County Personnel Board (JCPB or Personnel Board):

- Superintendent (1)
- Labor Supervisors (3)
- Turf Grass Supervisor (1)
- Skilled Laborers (4)
- Laborers (6)
- Office Manager/Administrative Assistant (1)

A sixteenth position, a Laborer, was budgeted in FY 2012 and FY 2013, but not funded in FY 2014. This position recently was added to the budget to cover workload for Cahaba River Park.

Parks' FY 2014 budget asked that a Labor Supervisor be reclassified to a Parks Maintenance Supervisor, but the request was not funded.

Equipment

The Parks Superintendent provided an inventory of equipment that includes:

- 9 vehicles (see below)
 - 27 miscellaneous pieces of equipment (e.g., mowers, trailers, tractors, Bobcats) and small engine items (e.g., weed whackers, blowers, generators)
 - 21 shop tools
- Major equipment items assigned to crews are listed below:
- Administration (1): 2004 Dodge Durango
 - Complex Crew (1): 2011 Ford F-150
 - Odd Jobs Crew (1): 2009 Ford F-350
 - Turf Crew (3): 2008 Ford F-150 (Supervisor), 2012 Ford F-350 (2)
 - Route Crew (1): 2013 Ford F-350
 - Parks Crew (1): 2009 Ford F-350
 - Shared Items (1): 1999 Ford F-350 (fuel truck)

It appears that most mainline vehicles and equipment are relatively new and replaced, for the most part, at the end of an items useful life.

C. SWOT ASSESSMENT

Introduction

The SWOT Assessment is the result of interviews involving almost 50 people with a stake in the services of the Department of Parks & Recreation, including the liaison from the City Council, City Manager, Finance Director, City Planner, various stakeholders, strategic partners, and department supervisors and employees.

The Assessment is a compilation of the perspectives of these people on four topics:

- > **Strengths:** What the Department should be proud of, does well, and is noted for. Services and accomplishments that City officials, stakeholders, and citizens appreciate.
- > **Weaknesses:** Situations, services, methods, and policies needing improvement, fine-tuning, or overhaul. Resource needs beyond the current budget.
- > **Opportunities:** Service delivery ideas, new or expanded services, new ideas and approaches, possible collaborative opportunities, etc.
- > **Threats:** Events or situations that would cause the "wheels to fall off." Typically, many of these threats are the result of state and national factors.

For each topic, major themes are identified when discussed in a significant number of the interviews. Each theme is presented based on a compilation of the insights of all parties interviewed.

Note that these findings are the perceptions of the parties interviewed and may not accurately reflect the current situation or represent a consensus of persons interviewed. In some cases information is out-of-date or incorrect and in others the comments accurately reflect the current situation. So, care must be taken not to overreact to any perceived positives or negatives in the SWOT Assessment.

Findings

Exhibit 2 in Chapter V provides a detailed summary of comments by persons interviewed and completing questionnaires, which are broken down into four categories:

- > Overall Assessment (compiling all interview categories),
- > City officials and staff,
- > External stakeholders, and
- > Department employees.

From this detailed assessment, Mercer gleaned the following key findings for the Department of Parks & Recreation.

Major Current Strengths

- > Strong, well-coordinated Park & Recreation Board
- > New Park Superintendent ("lots of weaknesses have been fixed" with her coming, including organization plan, staffing, and employee attitudes)
- > Skills, experience, and teamwork of departmental staff
- > Quality and condition of parks and athletic fields ("incredible," "outstanding")
- > Paths and Sidewalks Plan nearly implemented
- > Schools-Parks/City and Associations-Parks/City relationships

Major Current Weaknesses

- > Need a long-term vision and plan for parks and recreation (Comprehensive Parks & Recreation Plan and associated Parks Department Functional Business Plan)
- > Need more playing fields, particularly big fields for practices
- > Impact of traveling teams on opportunities for recreational-level sports
- > More internal structure, systems, and controls (e.g., enforced tardiness policy)
- > Is the department on cruise control?

Major Future Opportunities and Challenges

- > Cahaba River Park
- > Community Center with gyms (but lack of support in the past)
- > Keeping up with participation in emerging and growing sports, like lacrosse recently
- > Provide adequate opportunities for participation at the recreation level for older kids

Major Threats

- > National recession affecting the local economy and city revenues
- > Cuts in staffing or equipment replacement funding
- > Hiring employees with the wrong attitudes

D. 2014 CITIZEN SURVEY

In 2014 the City of Mountain Brook contracted with the ETC Institute to conduct a citizen survey on satisfaction and needs. Parks and Recreation findings are:

- > 90% were very satisfied or satisfied with the quality of City parks and recreation programs and facilities compared to 71% in 52 other communities, with a range of 50% to 95% in all communities.
- > 77% indicated parks and recreation programs and facilities as their 1st, 2nd, or 3rd choice in requiring emphasis on the next two years.
- > 85% were very satisfied or satisfied with Mountain Brook as a place to play and for leisure, which is related to, but a bit different, than services of the P&R Department.
- > Satisfaction with varying aspects of Parks and Recreation were high. The total very satisfied and satisfied ratings for these aspects and other community scores are:
 - Maintenance of City parks (94% and 77%)
 - Youth Programs through MB Athletics (88% and 69%)
 - Ease of registering for programs (84% and 62%)
 - Maintenance of sidewalks and walking trails (84% and 56%)
 - Outdoor athletic fields (82% and 69%)
 - Youth Programs through MB Soccer (82% and 69%)
 - Number of walking trails (80%)
 - Number of City parks (77% and 71%)
 - Fees charged for recreational programs (76%)
- > Services requiring the most emphasis over the next two years as rated 1st, 2nd, or 3rd priorities are:
 - Maintenance of sidewalks and walking trails (43%)
 - Maintenance of city parks (35%)
 - Number of walking trails (35%)
 - Number of City parks (25%)
 - Outdoor athletic fields (23%)
 - Youth Programs through MB Athletics (18%)
 - Fees charged for recreational programs (9%)
 - Youth Programs through MB Soccer (5%)
 - Ease of registering for programs (4%)
- > On a scale of 1 (Highest) to 5 (Lowest), expansion of trails and sidewalks (2.84) are second only to road resurfacing and new parks and fields (3.3) are fourth.

APPENDIX 1

E. COMPARATIVE ANALYSIS

Overview of the Comparative Analysis

In the comparative analysis (see Table 3 that follows) we provide high-level data and statistical analyses of Mountain Brook and four other cities suggested by the City Manager:

- > Homewood, Alabama
- > Birmingham, Michigan
- > Hinsdale, Illinois
- > Lake Forest, Illinois

Data elements collected include:

- > Population as of 2010
- > Size in square miles
- > Total number of parks
- > Total parks acreage
- > Total number of ball fields and gyms
- > Most recent budget for Parks Maintenance (but not Recreation)

Analyses conducted include:

- > Acres per 1000-population
- > Parks per 1000-population
- > Ball fields per 1000-population
- > Parks Maintenance cost per capita

Findings

For years the National Recreation and Parks Association (NRPA) recommended 10 acres of parkland per 1000 residents and prior to this standard MRPA 1983 recommended 6.25 to 10.5 acres of developed open space per 1000 residents. As of 2011, however, these standards are in the process of changing to a more data-driven measure. Standards that may apply to Mountain Brook are:

- > Total Parks Acreage 127 to 214 acres using the 1983 standard (MB = 110 acres)
- > Baseball/Softball Fields: 1 of each per 5,000 residents = 8 fields (MB = 6)
- > Soccer Fields: 1 per 10,000 residents = 2 fields (MB = 3 + Rathmill + Schools)
- > Swimming Pool: 1 per 20,000 residents = 1 pool (MB = private pools)
- > Tennis Courts: 2 per 2,000 residents = 10 (MB = 7 + Schools + Private)
- > Trails: 1 per community or region (MB = Several trails, but not fully connected)

Table 3
Highlights of the Comparative Analysis

DESCRIPTOR	MTN BROOK	Four City Average	Birmingham, Michigan	Hinsdale, Illinois	Homewood, Alabama	Lake Forest, Illinois
Baseline Data:						
2010 Population	20,413	20,389	20,103	16,816	25,262	19,375
Area (Sq. Miles)	12.20	8.75	4.80	4.64	8.30	17.24
Parks Board	Yes	75% Yes	No	Yes	Yes	Yes
# of Parks	8	15	22	18	8	12
Parks Acres (1)	110 +Islands	136 +Islands +More	128	130 +Islands	85.5 +ROW +Facilities	200+ +Cemetery +Forestry
Miles of Trails	Get	12	2	None	3	31
Ball Fields	15	10	10	6	10	13
Special Facilities	15 Iroindale Rathmell	See Cities	Golf (2) Racquet Club Ice Arena Dog Park Mini Park (3) Lake	Platform Tennis Lodge Pool Skate Park Ice Skating	Soccer Park	Lake Beach Ponds Rec. Ctr. Golf Sr. Ctr.
Parks Budget (2)	\$1,110,490	\$1,547,220	\$1,067,610	\$1,121,269	\$1,500,000	\$2,500,000
Parks Staff	16	12	11 (No Golf)	5	21	Get
Parks Analysis:						
Park Acres per 1000-residents:	5.39	6.96	6.37	7.73	3.42	10.32
Trails Miles per 1000-residents:	Get	.60	.10	N/A	.11	1.6
Ball Fields per 1000-residents:	.73	.48	.50	.36	.40	.57
Budget Analysis:						
Parks Only Cost per Resident:	\$54.40	\$	\$53.11	\$66.68	\$59.38	\$129.03
Parks Staff per 1000-residents:	.78	.56	.55	.30	.83	Get

(1) Acreage excludes golf courses
 (2) Parks Budget for Homewood is estimated based on staffing and operating expenses and for Lake Forest is estimated based on staffing
 (3) NRPFA Standard for acres per 1000-residents (10 in the past) is changing to a national survey-based number

F. EMPLOYEE SURVEYS

Overview of the Surveys

To gather employee data and perceptions, we applied five Mercer Group surveys: the Management Philosophy Profile (MPP) (see later in the report); and an Organizational/Operational Questionnaire (see later in the report).

The five employee surveys are:

- > Values
- > Organizational Climate
- > GRIPES or Management Practices
- > Resources
- > Personnel Practices

The detailed results of the employee surveys issued to Parks employees are provided in Exhibit 3 and the master survey documents are provided as Exhibits 4 (surveys), 5 (questionnaire), and 6 (MPP), all in Chapter V.

In total, we processed fourteen completed responses from Parks & Recreation employees, which is close to a 100% response rate. The data in the survey reports are reported by the following three Employee Types:

- > All All Parks Employees
- > 001 Supervisors (6)
- > 002 Non-Supervisors (8)

Because of the small number of employees in Parks, we do not report scores by function or crew, which only have 2-3 employees compared to Mercer's minimum reporting standard of six people in an Organizational Category.

Mercer's Minimum and High Performance Standards, overall scores for Parks, and overall scores for recent Mercer clients, are shown on Table 3 that follows for GRIPES, Resources, Personnel Practices, and the OCS. Note we include citywide and Parks scores for Mountain Brook from our 2003 study of city departments for comparison.

Overall, the surveys resulted in scores relatively comparable to the 2003 Parks surveys (but 3 of 4 scores are slightly higher) and the best results for other Mercer clients nationally and regionally (Colorado City).

However, lower scores for individual factors (like Staffing) may indicate issues and challenges to address as noted in the following pages and chapters of the report.

Findings (Continued)

The Comparative Analysis data in Table 3 yields the following insights on Mountain Brook parks and recreation services and facilities. Mercer was required to do a bit of extrapolation to break out Parks Only costs and staff from total Parks and Recreation figures in some communities:

- > Parks Board: Three of four comparative communities have advisory Parks and Recreation Boards.
- > Parks Acreage: Except for Lake Forest as a bit of an outlier in total land area parks acreage, each community has a relatively similar number of parks and parks acreage.
- > Maintenance Responsibilities: Increase acreage for islands and rights-of-way, as well as the cemetery, forestry, and facilities in some communities.
- > Trails: Only Hinsdale, the smallest community in land area lacks internal trails. But, Illinois communities often benefit from trails in regional forest preserves.
- > Ball Fields: Baseball, softball, and soccer fields are fairly similar across the communities.
- > Special Facilities: Other communities tend to have a significant number of special facilities not found in Mountain Brook or provided by private organizations. These include a Recreation Center, Senior Center, Dog Park, and lake/beach facility.
- > Parks Maintenance Budget: Breaking out parks only expenses from parks AND recreation budgets is difficult in Homewood and Lake Forest. Excluding these two communities, the budgets for Mountain Brook, Hinsdale, and Birmingham are very similar.
- > Parks Maintenance Staff: Staffing levels also are all over the map and reflect the specific composition of the parks maintenance and associated functions in each community parks and recreation department. How Hinsdale gets by with five parks maintenance positions is a bit of a mystery, likely solved by parks' inclusion in a public works type department where staff is cross-utilized.

Table 4
Employee Survey Scores for Mountain Brook & Recent Mercer Clients

CLIENT	GRIPES	RESOURCES	PERSONNEL PRACTICES	ORGANIZATIONAL CLIMATE SURVEY
Mercer Standard	4.0=Good 3.0=Adequate Under 2.5	4.0=Good 3.0=Adequate Under 2.5	4.0=Good 3.0=Adequate Under 2.5	60% Agree<30% Disagree 50% Agree<40% Disagree <50% Agree/40% Disagree
Min. Brook Parks 2013-2014	3.12 80.0%	3.75	3.42	67.76% Agree 18.67% Undecided 13.57% Disagree
Min. Brook Parks 2003	3.47 82.0%	3.64	3.03	56.82% Agree 20.30% Undecided 22.88% Disagree
Min. Brook CITY 2003	2.84 76%	3.36	2.98	58.55% Agree 15.66% Undecided 25.78% Disagree
Colorado City	3.46 83%	3.48	3.73	72.92% Agree 11.25% Undecided 15.83% Disagree
Massachusetts Town	2.36 60%	2.44	2.18	39.08% Agree 15.33% Undecided 45.59% Disagree
Texas City	Not Used	3.07	2.73	51.67% Agree 15.66% Undecided 32.66% Disagree
Comparables AVERAGE	2.91 71.5%	3.00	2.88	54.54% Agree 14.42% Undecided 31.05% Disagree

Results of the Surveys

Values Survey

This survey asked Parks employees five Yes-No questions about the status and application of organizational values:

- Values Statement: 50% of Parks employees indicated a formal values statement is in place.
- Communication of the Statement: Only 36% of Parks employees indicated that values are communicated or posted.
- Employee Input: Only 14% of Parks employees, likely supervisors, indicated that values are developed with employee input. Values seem to have been created by the prior Superintendent.
- Relationship to City Values: 57% of Parks employees indicated that department values are related to City values, which is surprising based on scores for the first three questions.
- Values Lived Day-to-Day: Although not all Parks employees could identify a formal set of values, 77% indicated a values system is lived out day-to-day.

Based on the use of the Values Survey in other clients, Mercer likes to see that Yes scores are twice the No scores. Mountain Brook Parks & Recreation did not meet this standard.

The survey also asked employees to list values in place in the department, with a list of sample values provided from other Mercer clients. The values most frequently identified across the department are listed below:

- Community
- Stewardship
- Integrity
- Respect
- Safety
- Keeps Parks Clean

GRIPES Survey

This survey measures the adequacy of a variety of management practices, such as Growth (personal development and training), Respect and recognition, Information, Potential tapped, Empowerment, and Support...hence the acronym GRIPES.

Most factors are scored on a five-point scale with 1=Poor, 2=Fair, 3=Average/Adequate, 4=Good, and 5=Excellent, with Potential scored as a percentage. Based on the survey's application in over 50 other clients, Mercer's Standards (or Goals) for this survey are:

- High Performance: 4.0=Good or 70% Potential
- Minimum: 3.0=Adequate or 60% Potential
- Problematic: Approaching (Under 2.5) or under 2.0=Fair and under 60% Potential

The department's overall GRIPES score is a solid 3.12, which exceeds our Minimum Standard. Potential is a robust 80%, which meets our High Performance Standard.

A few factors, however, had lower scores, either for the department as a whole or for a division or section:

- Training Hours: Both Supervisors (2.6) and Non-Supervisors (2.0) rate this factor low. The adequacy of training hours is a recurring issue in studies of maintenance-oriented organizations.
- Respect by Elected Officials: Both Supervisors (2.67) and Non-Supervisors (2.0) rate this factor low. This score often is low for agencies located away from City Hall because these employees seldom have face-to-face interaction with public officials.
- Rewards: Non-Supervisors (1.86) rated this factor very low, which corresponds to a somewhat low Compensation & Benefits score on the OCS.
- Information: Non-Supervisors rated these two factors under 2.5=Problematic. Perhaps this is a hold-over score from the prior administration?
- Support: Non-Supervisors rate support from Support Services department and Elected officials at or only slightly above 2.0=Poor. Again, this may be because Non-Supervisors have limited contact with City Hall officials and staff, so don't see the positive things that come from decisions of the Mayor and City Council and the Parks Board, and the work of City staff.

Organizational Climate Survey (OCS)

The OCS measures the state of the organization's culture, internal relationships, and employee attitudes toward work based on six indicators or statements grouped into twelve sub-scales.

This survey is scored on a percentage for Strongly Agree + Agree, Undecided, and Strongly Disagree + Disagree choices. Based on the application of the OCS in over 100 other clients, we have developed the following Mercer Standards (or Goals):

- High Performance: Agree score of at least 60% with a Disagree score under 30%
- Minimum: Agree score of at least 50% with a Disagree score under 40%
- Problematic Scores: Agree scores below 50% and Disagree scores at or above 40%

The twelve factors (a/k/a sub-scales) rated by employees are:

- Career Opportunities
- Compensation and Benefits
- Employee Involvement
- Information and Communications
- Management Competence
- Productivity and Service
- Quality Emphasis
- Receptivity to Change
- Understanding of Organizational Goals
- Work Group Problem Solving (among managers and supervisors)
- Work Group Coordination and Cooperation (among employees)
- Working Conditions

The department's overall average of 67.76% Agree, 18.67% Undecided, and 13.57% Disagree meets our High Performance Standard. Only the Compensation and Benefits (58.57%) subscale has an overall score below 60% Agree. Still, the overall score is very positive, except for non-supervisors scores on two subscales.

Supervisors (74.17% Agree) are about 18% overall more positive than Non-Supervisors (56.09%), meaning Agree scores are higher and Disagree scores are lower for supervisors. Normally we see a spread closer to 10% than 20%, so Parks Supervisors are much more positive than non-supervising employees.

Surprisingly (because of the new facility and Superintendent), non-supervisors rate Working Conditions (45% Agree) and Receptivity to Change (50% Agree) somewhat low.

Resources Survey

This survey measures the adequacy of a variety of resources provided through the budget. This survey is scored on a scale of 1 (Poor), 2 (Fair), 3 (Adequate), 4 (Good), and 5 (Excellent). Based on the application of the Resources Survey in over 50 other clients, we have developed the following Mercer Standards (or Goals):

- High Performance: 4.0=Good
- Minimum: 3.0=Average/Adequate
- Problematic: Approaching (under 2.5) or below 2.0 (Fair)

The nine factors rated by employees are:

- Staffing
- Facility
- Vehicles
- Tools
- Gear
- Office Equipment
- Computers
- Materials
- Other Resources (such as training funds and contracts)

The Department's overall score is 3.75, is very close to our High Performance Standard. Only two scores for Non-Supervisors were below 3.0, our minimum standard:

- Staffing (2.63): The surveys were administered before the City approved the 16th position so this score might be higher if the surveys were administered today.
- Gear (2.88): This score is close to our Minimum Standard. Per interviews, this score may be more reflective of complaints about sharing a back hoe with Public Works and the condition or number of some ground maintenance equipment than personal gear.

Personnel Practices

This survey measures the effectiveness of personnel administration/human resource management functions and activities.

This survey also is scored on a scale of 1=Poor, 2=Fair, 3=Average/Adequate, 4=Good, and 5=Excellent. Note that scores on this survey tend to be ½ to 1 point lower than scores on the Resources Survey. Based on the application of the Personnel Administration Survey in over 50 other clients, Mercer has developed the following standards/goals:

- High Performance: 4.0=Good
- Minimum: 3.0=Average/Adequate
- Problematic: Approaching (under 2.5) or below 2.0 (Fair)

The ten factors rated by employees are:

- Hiring Process
- Career Ladders
- Training
- Grievances (by employees)
- Discipline (by the city)
- Performance Evaluations
- Pay
- Benefits
- Labor Relations
- Morale

The department's overall score (3.42) meets our Minimum Standard. Unlike other clients, the Personnel Practices score is close to the Resources score (often they are .5 apart with Resources higher).

Again, Non-Supervisors rate some factors lower than 3.0, our minimum standard. Training, Grievances, and Discipline (City/department actions) are only slight low at 2.88. Two factors, however, are moving toward 2.5=Problematic:

- Performance Evaluations (2.67): The overall score is slightly below our Minimum Standard. Lower scores on this factor are common in a smaller organization.
- Pay (2.71): This score connects to lower scores on Compensation & Benefits in the OCS and Rewards in GRIPES.

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G. ORGANIZATION/OPERATIONS QUESTIONNAIRE

Overview

Exhibit 5 in Chapter V of the report provides a Master Copy of the Organization and Operations Questionnaire, which was completed by fourteen Parks employees.

These questionnaires were the basis for individual interviews with Parks employees. Issues, ideas, and challenges from the questionnaires and interviews were compiled and addressed in various sections and chapters of the report as described below.

- Employee Job History, Work Goals, and Special Skills: This information provides background information on employees, the organization plan, staffing plan, and operational practices of the department. This information is used ONLY in aggregate or to identify overriding themes and is NOT used to critique individual employees.
- Strengths, Weaknesses, Opportunities, and Threats: This information supports the SWOT Assessment earlier in this chapter.
- Department Vision, Mission, Goals, and Objectives: This information supports Strategic Direction in Chapter III.
- Employee Job Description, Job Duty Analysis, Backlog, and Transfers: This information supports the Organization and Staffing Analysis in Chapter III.
- Operations Improvements: This information supports the Operations Management section of Chapter III.

Key Findings

- Employee Participation: Employees were very open in completing the questionnaire and in providing ideas and suggestions in each part of the questionnaire. Similarly, they were willing to answer the consultant's questions and explain what they wrote in the questionnaire during interviews.

- Strategic Direction: Only a few employees have a clear understanding of the department's long-term Vision. Most say Parks should continue doing what it has been done for a long time or wait until the Superintendent decides.

Similarly, the Mission Statement is unclear or only partly understood by employees. Most in a general way said it should be "to serve the citizens and keep parks looking good." Employee understanding of strategic direction gets murkier as the topics get more specific (Goals, Objectives, and Performance Measures).

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Recommendations

1. **Issues and Opportunities from the Surveys:** The following key issues need to be reviewed and improved by the City and/or the Parks Department.
 - **Organizational Values:** The Parks Superintendent should meet with Non-Supervisors to review the reasons for lower scores on the Organizational Values questions. With new leadership, now is a good time to revisit these foundational cultural elements.
 - **Organizational Climate:** The Parks Superintendent, and in some cases the City, also should review the reasons for lower Non-Supervisor scores on Compensation & Benefits, Working Conditions, and Receptivity to Change, as well as acceptable, but surprising for a department with high citizen survey marks, for lower scores on Quality Emphasis and Productivity & Customer Service. These last two subscales are KEY service delivery measures and should be at least at the 60% Agree level and moving toward 70% Agree.
 - **GRIPES/Management Practices:** The Parks Superintendent also should review the reasons for lower scores for Training Hours, Respect by Elected Officials, Rewards, Information (by Non-Supervisors), and Support.
 - **Resources:** Although most Resources scores are excellent, the Parks Superintendent should review lower score for Staffing to see if it is a hold-over from before the City approved the 16th position.
 - **Personnel Practices:** The Parks Superintendent and the City's HR Director should review the lower scores for Pay and Performance Evaluations. As with DPW, we think new management in Parks will result in higher scores on city and department-controlled factors.

2. **Future Use of the Surveys:** We recommend that our clients repeat the Employee Surveys about 24 months after our report is delivered to measure progress in making improvements and changes identified in the surveys. For example, now would be a good time to repeat the employee surveys in the Public Works Department.
 - **Special Skills:** Employees identified a number of special skills and experience that might be of use to the department and the City. These include:
 - Flowers
 - Landscaping
 - Welding
 - Small engine mechanic
 - Audio engineer
 - Small business operation
 - Concrete work
 - Cash processing
 - Ball field set-up (2)
 - Floor maintenance
 - **Job Duty Analysis:** Information in the questionnaires show a relatively well-organized and cohesive job structure with clearly assigned supervisors, relatively current job descriptions (all but one 75% or 100% accurate), a clear list of assigned duties, very limited backlog of work, and few suggestions to transfers of job duties to or from another employee.
 - **Operations Management:** Only ½ of the employees offered operational suggestions in this part of the questionnaire.

Recommendations:

3. **Issues and Opportunities from the Questionnaires:** The following key issues need to be reviewed by the City and Parks. Specific recommendations for these issues are provided in other parts of the report as noted in parentheses.
 - Rework the department's strategic direction, including vision, goals, objectives and performance measures (See Chapter III, Strategic Direction)
 - Better communicate the department's mission statement as listed on the web site (also see Chapter III, Strategic Direction)
 - Assess if special skills identified on the questionnaire have value to the department or the City (see Chapter III, Organization and Staffing)
 - Assess the value of operational suggestions (see Chapter III, Operations Management)

4. **Future Use of the Questionnaires:** Normally, the Organizational and Operations Questionnaire is only used during a management study and not repeated in 24 months like the Employee Surveys. The City and department, however, are welcome to re-apply this survey as needed or beneficial in the future.

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H. MANAGEMENT PHILOSOPHY PROFILE

Overview

The Management Philosophy Profile (MPP) was distributed to six supervisory personnel, including the Superintendent, Office Manager, and four Labor Supervisors. A master copy of the MPP is provided as Exhibit 6 in Chapter V of the report.

We asked these managers to rate themselves on twelve indicators of management philosophy, which are clustered into three major categories, and at two points in time (Today and a future Target). Each indicator allows the manager to select from a five-step range of scoring choices between two extremes (one identified as 1 and the other as 5 with grades 2, 3, and 4 in between):

- > **Personality:**
 - Type (Introvert to Extrovert)
 - Risk-Taking (None to Lots)
 - Initiative (Very Reactive to Very Proactive)
 - Solutions (Mostly Feelings to Mostly Analysis)
- > **Work Focus:**
 - People (Very Internal to Very External)
 - Work (Mostly Details to Mostly Macro)
 - Resources (Mostly Things to Mostly People)
 - Time (All in the Past to The Past to a Year+)
- > **Relationships:**
 - Status (Mostly a Boss to Mostly Empowering)
 - Delegation (Very Central to Mostly Broadly Delegated)
 - Decision (Mostly Closed to Mostly Open)
 - Communications (Very Formal to Very Informal)

Basically, the lower the score the closer one is to the first of the two Management Philosophy extremes and the higher the score the closer one is to the second extreme. So, someone scoring 1 or 2 on Personality-Type would be very or somewhat Introverted and someone scoring 4 or 5 would be somewhat or very Extroverted.

Mercer reviewed each supervisor's responses proposed an optimal score for each of the twelve criteria. These scores will be shared only with each supervisor and aggregated for the management team as a whole in the report.

Table 5
Results of the Management Philosophy Profile for Parks

Category and Indicator	Scoring is a five-step scale with low to high choices	TODAY	TARGET	MERCER
Personality				
Type	1=introvert to 5=extrovert	3.8	4.2	3.5 to 4.0
Risk-taking	1=low to 5=high	2.3	3.2	3.0 to 3.5
Initiative	1=reactive to 5=proactive	3.5	4.3	3.5 to 4.0
Solutions	1=feelings to 5=analysis	2.8	3.5	3.5 to 4.0
Work Focus				
People	1=internal to 5=external	3.0	3.2	3.0 to 3.5
Work	1=details to 5=macro	2.8	3.3	3.0 to 3.5
Resources	1=things to 5=people	3.3	3.5	3.0 to 3.5
Time	1=past to 5=future	3.8	4.3	4.0 to 4.5
Relationships				
Status	1=boss to 5=empowering	4.0	3.8	3.5 to 4.0
Delegation	1=central to 5=decentralized	3.0	3.3	3.5 to 4.0
Decisions	1=closed to 5=open process	3.0	3.5	3.5 to 4.0
Communications	1=formal to 5=informal	3.5	4.0	3.5 to 4.0
MERCER STANDARD COMPLIANCE INDEX	Measures the number of factors on which the group's Future score is within .5- points of the Mercer Standard	Above Expectation 10-12 meet Mercer Goal	At or Near Expectation 7 to 9 meet Mercer Goal	Below Expectation Under 7 meet Mercer Goal
Parks Score-Compliance:	Positive move from Needs Improvement to Good	6 = Below	12 = Good	
GROUP TRANSITION INDEX	Measures the amount of change needed to move from the Today to the Target by the number of managers with changes, number of factors changing, range of change, and average change (+/-)	Above Expectation 25% managers 1-2 factors -5 to +5 +/-3.5 average	At or Near Expectation 50% managers 3-4 factors -10 or +10 +/-6.5 average	Below Expectation 75% managers 5+ factors -15 or +15 +/-9.5 average
Parks Score-Transition:	Overcorrected in moving from Today to Target	50% = At or Near	54% = At or Near	
GROUP COHESIVENESS INDEX	Measures the cohesiveness of the group's Management Philosophy by the number and percentage of indicators having more than a 1-point difference among the Target scores of the managers	Above Expectation 1-3 factors vary by >1 point	At or Near Expectation 4-6 factors vary by >1 point	Below Expectation 7-12 factors vary by >1 point
Parks Score-Cohesiveness:	Today to Target does not bring managers together	11 of 12 = Below	11 of 12 = Below	

Findings

The results of the MPP are compiled on Table 4 that follows. At the bottom of Table 4, we provide three indexes that are explained below:

- > **Mercer Standard Compliance Index:** Measures the degree to which the Today and Target scores of managers complies with Mercer's Suggested Score (or Goal) for their level of position.
 - **High Compliance:** Managers are within .5 of the Mercer Standard on 10 to 12 of the twelve factors. **Above Expectation.**
 - **Moderate Compliance:** Managers are within .5 of the Mercer Standard on 7 to 9 of the twelve factors. **At Expectation.**
 - **Low Compliance:** Managers are within .5 of the Mercer Standard on fewer than 7 of the twelve factors. **Below Expectation and Needs Improvement.**
- > **Group Transition Index:** Measures the amount of change that managers say they need to make in order to transition from their Today to their Target scores. Criteria measured include the number of managers with changes, numbers of factors with changes, the range of changes (+/-), and the average change (+/-).
 - **Low Transition:** A small number of Managers in the group indicate only a small number (1-2) of factors to be changed and/or a high numerical (>2 points) change for only a few factors. **Above Expectation.**
 - **Moderate Transition:** More Managers in the group indicate a moderate number (3-4) of factors to be changed and/or high numerical (>2 points) change for more factors. **At Expectation.**
 - **High Transition:** A large number of Managers in the group indicate a high number (>5) of factors to be changed and/or a high numerical change (>2 points) for several factors. **Below Expectation and Needs Improvement.**
- > **Group Cohesiveness Index:** Measures the cohesiveness of the group's Management Philosophy by the number and percentage of indicators having more than a 1-point difference among the scores of the group of managers.
 - **High Cohesiveness:** Most managers are close to each other in their ratings of individual factors with only a few factor (1-3) scores varying more than 1-point up or down. **Above Expectation.**
 - **Moderate Cohesiveness:** Many managers are close to each other in their ratings of individual factors with some (4-6) scores varying more than 1-point up or down. **At Expectation.**
 - **Low Cohesiveness:** Only some managers are close to each other in their rating of individual factors with several (7-12) scores varying more than 1-point up or down. **Below Expectation and Needs Improvement.**

Recommendations

5. **Management Philosophy:** Clearly it's a brand new ballgame under the new Parks Superintendent, just like in Public Works in 2011. Employees in Parks comment on the positive changes in communication levels, tone, and professionalism with the new Superintendent.

Although, the overall Target/Future scores are in high compliance with Mercer Goals, the need for some improvement in the department's overall management philosophy are evident in two indexes:

- **Transition:** The Parks Superintendent should ensure the department revisits the management philosophy as Target/Future scores seem to overcompensate from Today scores. Rethink individual Target scores based on Mercer goals and management team discussion.
- **Cohesiveness:** The Parks Superintendent should work to make the management team more cohesive internally. Again, use Mercer goal to reconsider individual Target scores and to discuss differences among individual managers. Enhanced cohesiveness is most important between the Superintendent and the Labor Supervisors.

Mercer will review these issues with the Superintendent, supervisors, and staff during our review of the Draft Report and lead them through an exercise or two to improve department and individual management philosophies to enhance cohesion.

6. **Future Use of the MPP:** We recommend that our clients repeat the Management Philosophy Profile about 24 months after our report is delivered to measure progress in making improvements and changes identified in the surveys.

APPENDIX I

III. PARKS & RECREATION ASSESSMENT

This chapter of the report presents findings, analyses, and recommendations related to the six major categories in our *50 Management Issues for Organizational Improvement* (Governance, Strategic Direction, Service Delivery Structure, Organization and Staffing, Operations Management, and Resource Management).

A. GOVERNANCE

1.) Legal Structure

Findings

The Parks & Recreation Board (Parks Board or the Board) is authorized and empowered under Section 11-46 of the Alabama Code and under Section 38 of the City Code of Ordinances. Language used in the state and city codes is very similar. In summary, these State and City code sections indicate:

- > The board is called the "Recreation Board" and has five to nine members (the City selected nine), who are appointed by the City Council.
- > The board is charged with adopting rules and regulation to direct, supervise, and promote recreation programs and parks facilities.
- > The board, with the approval of the city council, may appoint a municipal director of recreation as its executive officer, as well as employ staff.
- > Employee salaries are to be fixed by the City Council (or in Mountain Brook by the processes of the Jefferson County Personnel Board).

In practice, the Board is called the Parks Board and its role is advisory to the Mayor and City Council. The Parks Board acknowledges this role with a rare exception.

Parks & Recreation is a department of City government and budgeted positions are employees of the City, not the Board. Salaries are set by the Jefferson County Personnel Board under different statutes and codes.

Recommendations

- 7. Legal Structure: No changes recommended.

2.) Parks and Recreation Board

Findings

Mercer attended two board meetings of the Parks Board and interviewed all but one board member, as well as the City Council liaison, City Manager, Parks Superintendent, and several policy-level stakeholders. We learned:

- > The board is seen and acts as an advisory body to the Mayor, City Council, and City Manager. It reviews ideas and makes recommendations on parks and facility needs. For example, a memorial bench in Jemison Park.
- > The board is composed of high-level, experienced people with a strong commitment to recreation and parks services in the City. Members include people who grew up in Mountain Brook, have or had kids participating in various athletic programs, coached kids, are a member on the Tree Commission, work at a garden shop, work in commercial real estate, and formerly worked in the Parks Department.
- > The board members say they work well together to develop policies, rules, and regulations and to identify future needs for the community. A City Council member is assigned as a liaison to the board and the City Manager often attends meetings (as he does with the Tree Commission).
- > The Board has not created a long-term vision for park and recreation services in the City and, similarly, has not recommended the City conduct (or gotten the City to budget) a *Parks and Recreation Master Plan* through the Planning Department. This plan, like transportation and facilities plans, often is a sub-component to a city's long-range Comprehensive Plan.
- > The Parks Superintendent, current and prior, do a good job of briefing the board on plans, activities, and needs. A written Superintendent's Report is presented at each meeting. The MB Athletic Association representative on the board also gives an oral report on activities at each meeting.

Recommendations

- 8. Parks and Recreation Board: We encourage the Board to press the City and the Parks Department to develop a long-term vision for parks and recreation services in the City. In the Strategic Direction section of Chapter III, we will identify possible long-term needs, with a focus on services not currently provided and looming facility shortfalls.

3. Friends of the Mountain Brook Parks

Findings

Mountain Brook parks and recreation services are supported by several organizations:

- > Friends of Jemison Park: This group is moderately active in supporting maintenance and improvements for Jemison park and associated trails. Members tend to live adjacent to the park along Cahaba Road.
- > Sports Associations: These associations raise funds through participation fees to support sports programs. In the case of Mountain Brook Soccer and Lacrosse, they have teamed as major partners with the City to develop Rathnell Park, which they operate and maintain.

What Mountain Brook lacks is a citywide "Friends of the Parks" group similar to the Friends of the Emmet O'Neal Library. In other communities, these "friends" groups provide funds and encouragement for:

- > New parks,
- > Parks improvements and expansions,
- > Parks maintenance and major updates,
- > Consideration of emerging trends, and
- > Children's scholarship for sports and cultural programs.

Notwithstanding the lack of a strong citywide "friends" group, Mountain Brook residents historically have risen up to support needed investments in parks and recreation services, including the Crestline Tot Lot, T-ball, Lacrosse, and the new Cahaba River Park. A "champion" tends to come up with an idea and sell it to city residents, the Parks Board, and the City Council. Once enough funds are raised, often with significant private donations, the projects is initiated.

Recommendations

- 9. Friends of the Parks: Create a citywide "Friends of the Parks" group or a "Parks Foundation" to raise private funds for parks and recreation needs, including playing/practice fields and recreation-level sports (not competitive or traveling teams).

B. STRATEGIC DIRECTION

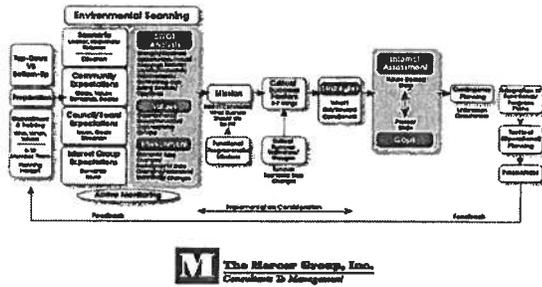
1.) Mercer Model for Strategic Planning

Figure 1 on the following page outlines the Mercer Model for Strategic Planning in the Public Sector based on our experience and on Jim Mercer's 1991 book, *Strategic Planning for Public Managers*. Our model includes several key steps and processes:

- > Preparation: Define an Approach to planning (Top-Down or Bottom-Up?), Commitment and Training, Steering Committee, and Planning Horizon.
- > Environmental Scanning: Compile Community, City Council, City staff, stakeholder, and interest group expectations; prepare a SWOT Analysis; identify Shared Values and Guiding Principles, analyze the Organizational Climate; and define Environmental Factors affecting operations.
- > Missions: Define missions at the Governmental (What businesses to be in?), Functional, Department, and Programmatic levels.
- > Critical Success Factors: Identify 5 to 7 things that define success.
- > Critical Success Indicators/Gauges: Measure such things as positive changes, improved efficiency, reduced turnover, and enhanced citizen satisfaction.
- > Strategies: Decide what to do, risks and rewards, costs and benefits, goals and objectives.
- > Internal and Gap Assessments: Define a future state and compare it to the present.
- > Contingency Planning: Provide options and plans to respond to unforeseen occurrences.
- > Integration of Functional and Tactical Plans: Align departments, divisions, programs, grants, and the like to the overall community expectations, vision, values, mission, and strategies.
- > Evaluation and Feedback: Close the loop so the strategic plan can be updated and improved periodically based on the experience of all parties involved.

Figure 1

THE MERCER GROUP
Local Government Strategic Planning Model



A key challenge in creating or updating Strategic and Functional Business Plans is the extent to which several planning initiatives are in place and are aligned:

- Vision Statements looking out 10 to 20 years.
- Statement of Core Values (or Guiding Principles).
- Citywide strategies based on Environmental Scanning and the SWOT Assessment.
- Mission statements (citywide and for departments)
- Operational and Tactical plans (for departments, divisions/sections, units/crews, and employees), which includes contingency planning.
- Financial plans (including annual budgets, long-term capital improvement plans, and enterprise plans).
- Functional, program, and/or process plans (often cross-departmental as for the development review process).

10. Strategic Planning Process: As the Parks Superintendent institutes more formal management practices, she and her management team should review the department's vision, values, and mission in an open process that encourages every employee to participate. Repeat this process every three to five years as required to meet current and future challenges.

In addition, the department should consider and develop a set of goals, objectives, and performance measures (as described below) during that process and in consultation with the Mayor, City Council, Park Board, City Manager, Finance Director, and City Planner.

11. Functional Business Plan: While not getting too complex or bureaucratic, the department should expand key elements of a functional business plan as noted below.

- a) Vision: As noted above, Parks should develop at least a ten-year vision statement that addresses where the department expects to be in 2025. The vision could include a discussion of:
 - ✓ Services to be provided
 - ✓ Service delivery structure (in-house vs. contract/collaborative services)
 - ✓ Organization and staffing (management and staffing needs)
 - ✓ Facility and equipment needs
 - ✓ Other resource needs
- b) Values: We like the current list of City values. From the Employee Surveys, however, we learned that department-level values need to be developed, with Respect as a starting point for unique Park-related values.
- c) Mission: The current mission statement seems to suit the department's role, but does not include language on the "Recreation" side of the department's and the Board's name. Under Service Delivery Structure that follows, Mercer discusses ways to incorporate visioning for Recreation into the City's and the department's strategic planning process.

APPENDIX I

2.) Parks & Recreation's Strategic Direction

Findings

- Strategic Planning Process: The City and the Parks & Recreation Department have an informal strategic planning process that is relatively short-term (a year or two) and centers on decisions made during preparation of the annual operating and capital budgets. A major visionary focus is capital needs (new and rehabilitation).
- Functional Business Plan: The Parks & Recreation Department has developed some, but not all, key elements of a functional business plan.
 - Vision: Neither the City nor the department have a formal Vision Statement looking out ten to twenty years. Notwithstanding, both seem to fully understand the strategic outcomes expected by citizens, elected officials, and other stakeholders. Key elements of that vision are wonderful looking parks (passive and active) and islands, as well as outstanding recreational opportunities for adults and children. The new Parks Superintendent clearly understood these expectations when hired and wants to "take parks to a higher level" with more "attention to detail." She expressed a goal that city parks and island will look at least as good as private residences ("beautification").
 - Values: The City has defined these shared values (w/a guiding principles): Integrity, Safety, Education, Community, Stewardship, and Beauty. The Parks Department uses these values as well, but has not tailored a Values Statement to the organizational requirements of Parks. Values identified in the employee surveys for this study for the most part mirror city values, with Respect added:
 - ✓ Integrity
 - ✓ Safety
 - ✓ Community
 - ✓ Stewardship
 - ✓ Clean Parks (Beauty)
 - ✓ Respect
 - Mission: Both the City and the department have mission statements, with a degree of overlap.
 - ✓ City: "A professional organization committed to Teamwork and Excellence, which promotes full participation in enhancing the quality of life for its residents."
 - ✓ Parks Department: "The Parks & Recreation Department strives to improve the well-being of the residents of the city by providing an attractive, clean, and safe environment for active and passive recreational activities" (from the city's web site). Note the mission focus is infrastructure maintenance for which all of Parks' staff is dedicated.

d) Strategies, Goals, and Objectives: Each function or crew should develop targeted strategies, goals, and objectives to support achievement of the mission statement. These ideas should be simple and limited to a few key areas of service that are the responsibility of each crew.

Goals and Objectives identified in the Parks questionnaires include:

- ✓ Prepare written Vision and Values Statements for Parks
- ✓ Transition from the former to the current Superintendent
- ✓ Brings parks conditions to a higher standard (so they are as beautiful as residential properties)
- ✓ Upgrade ball field conditions
- ✓ Open the Cahaba River Parks
- ✓ Purchase or upgrade a few equipment items (tractor)
- ✓ Solve problems and work together better
- ✓ Cross-train and rotate employees
- ✓ Staff up to fully meet assigned responsibilities
- ✓ Be safe
- ✓ Create a great working environment
- ✓ Improve communications
- ✓ Create monetary incentives for high performance
- ✓ Fund all proposed projects in full

e) Performance Measures: Each function or crew should develop 2 or 3 performance measures for ongoing and project work that includes three elements for each measure:

- ✓ Output (e.g., how many units of service did we deliver?)
- ✓ Outcome (e.g., how did our work improve city life?)
- ✓ Cost (e.g., what did a unit of service cost?)

Exhibit 7 in Chapter V provides some examples of common parks & recreation performance measures.

C. SERVICE DELIVERY STRUCTURE

1.) Parks & Recreation Services in Mountain Brook

Findings

As with most parks and recreation agencies, services are delivered through a variety of providers, including Parks staff, other city departments, contractors, and collaborative partners.

- **In-House Services:** Services provided in-house by Parks employees are the result of years of work experience and management decisions, often executed through the City's annual operating and capital budgets. Major areas of service are:
 - Administrative and clerical support
 - Customer service requests (direct to Parks or forwarded from City Hall)
 - Construction (limited scope projects)
 - Facility management and maintenance at the Parks facility, the Sports Complex, and at city parks and trails.
 - Maintenance of athletic fields in city parks and at schools
 - Small engine maintenance
 - Herbicide application
 - Mosquito control
- **City Support Services:** The Parks Department is supported by several City departments in providing services. From interviews with city department heads and DPW managers and supervisors (in the DPW study), service support for the most part is excellent and includes:
 - **Finance:** Budgeting, accounting, accounts payable and receivable, human resources, payroll, purchasing, information technology, and the like
 - **Fire:** GIS system, but the system is little used by Parks
 - **Planning:** Paths and Sidewalks Plan, Land Use Plan, and Village Master Plans.
 - **Public Works:** Vehicle maintenance, equipment sharing, concrete work, large trees, leaf disposal, and sidewalks and trails construction.

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- **Collaboration and Coordination:** Parks' primarily collaborative relationships are with City Schools and athletic associations.
 - **Mountain Brook Public Schools:** Parks maintains and the following associations program recreational activities at the following city schools:
 - ✓ High School
 - ✓ Junior High School
 - ✓ Elementary Schools (Brookwood, Cherokee, Crestline, and Mountain Brook)
 - **Mountain Brook Athletics:** This private associate provides most recreational-level athletic programming within Mountain Brook, both outdoor and indoor. The director collaborates with Parks and the Parks Board.
 - **Mountain Brook Soccer and Lacrosse:** These private associations provided most of the funds for and operate and maintain Rathmell Park.
 - **Other Athletic Associations:** Also sponsor competitive, travelling teams.
- **Contracted Services:** A significant number of services are contracted out to the private sector. It appears from interviews that most of these service providers are doing a good job for the City. Major contract services are:
 - Ball field lights (except minor problems)
 - Major electrical work
 - Large trees (or DPW)
 - Large construction projects
 - Concession stands
 - Major repairs on equipment (mowers, etc.)
 - Janitorial services at the Parks Facility
 - Leaf pickup along streets

Like in Public Works, contracting decisions are based on past history with limited formal analysis of comparable costs and effectiveness. Based on studies for other Parks and Recreation Departments, these contracted and collaborative services seem reasonable on the surface. But, Parks lacks a detailed analysis to confirm this set of contract and collaborative relationships best serves the City.

In our decision-making model, contracts and collaborations should be used for seldom performed services, when special equipment and training are required, when staff lacks time or training to perform a task, in unique circumstances, and where there is a good supply of private sector contractors or public sector partners.

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Recommendations

12. Recreation Services Collaboration: The service delivery model for parks & recreation services in Mountain Brook has two distinct sides. Parks maintenance is the responsibility of the Parks Department, with help from Public Works and private sector contractors.

Recreation services, however, are provided primarily by outside parties, the private athletic associations, and not by city departments. The recreation providers are very independent of each other and provide distinct services.

Coordination of recreation services, therefore, is a challenge in Mountain Brook, but has worked up to this point likely because everyone knows each other and is willing to cooperate. A great deal of reliance is placed on the Executive Director of Mountain Brook Athletics to pull together recreational programs to meet community needs, outside of competitive soccer and lacrosse at Rathmell Park.

We suggest, therefore, that the City of Mountain Brook and its recreation services partners form a collaborative body, perhaps called the *Mountain Brook Recreation Coordinating Council* to assist in assuring that all community recreational needs are being met and that facilities and fields are adequate and scheduled optimally to serve all participants, particularly kids. Members would include:

- Parks Board member and City Council liaison
- Parks and Recreation Superintendent
- City Planner (meeting facilitator)
- Mountain Brook Schools representative
- Mountain Brook Athletics representative
- Mountain Brook Soccer and Lacrosse representatives
- Others as identified by the above

13. Structure of Maintenance Services: With only limited intergovernmental relationships, the primary service delivery question is what services should be provided in-house and what should be contracted. Compared to other local governments, Mountain Brook's process for answering this question seems relatively informal and is based on decisions made years ago and carried on year after year.

Although the present mix of contracted services seems reasonable based on other client, we recommend the Department be a bit more formal in analyzing the benefits of insourcing and outsourcing, with a particular focus on determining what it costs to provide in-house services so these costs can be compared to contract providers. This recommendation may indicate the need for a more intensive process for measuring time and materials invested in certain tasks.

Exhibit 8 describes the *Mercer Model for Collaboration and Contracting Decisions*. Once activity costs are determined, we suggest Parks use the model to compare the benefits of in-house vs. contract operation for major activities.

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D. ORGANIZATION AND STAFFING

1.) Parks & Recreation Assessment

Findings

Exhibit 1 shows the latest version of the Organization and Staffing Plan for the Parks & Recreation Department. The plan defines six (6) organizational divisions, five of these work crews, with sixteen positions:

- Superintendent (Grade 23)
- Turf Grass Supervisor (Grade 18)
- Labor Supervisor (Grade 15)
- Administrative Clerk (Grade 13)
- Skilled Laborer (Grade 12)
- Laborer (No Grade Assigned)

These positions are assigned to the various crews and units as follows:

- **Administration (2):** Superintendent and Office Manager
- **Complex Crew (4):** Labor Supervisor and Laborer (3 with the new position assigned for the spring/summer sports season)
- **Odd Job Crew (2):** Skilled Laborer (2). Note that two Skilled Laborers were recently moved from the Complex Crew to the Odd Jobs Crew under the direction of the Superintendent in order to support all other crews
- **Turf Crew (3):** Turf Grass Supervisor, Skilled Laborer, and Laborer
- **Route Crew (2):** Labor Supervisor and Laborer. Note that the third position on Exhibit 1 is currently assigned to the Complex Crew.
- **Parks Crew (3):** Labor Supervisor, Skilled Laborer, and Laborer.

In addition, one seasonal and three summer Laborers are added to supplement the full-time work force due to summer season demands. Hours funded amount to almost two FTEs.

In the past the department has been assigned other positions, not currently approved or budgeted, including:

- Parks Maintenance Supervisor (Grade 17)
- Administrative Assistant (Grade 16)
- Truck Driver (Grade 13)

Overtime is budgeted at 6.28% of Salaries, most of which is used to cover pre-scheduled evening and weekend shifts at the Sports Complex.

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Organization and staffing issues identified in interviews and surveys include:

► **Organization Plan:**

- **Parks Maintenance Supervisor Position:** This Grade 17 position has been proposed as an upgrade to one Labor Supervisor position (Grade 15), currently assigned to the Parks Crew. Creation of this position also is seen as a kind of consolation prize for one internal candidate for the Parks Superintendent position. The other internal candidate currently occupies the Turf Grass Supervisor position, which is classified as Grade 18. The City Manager and Parks Superintendent support this reclassification, with a final decision by the Jefferson County Personnel Board. Their reasons are:
 - ✓ Responsibility for 73 acres scattered across the city (most of any crew)
 - ✓ Number of structures in city parks (most of any crew)
 - ✓ Required knowledge of plant materials
 - ✓ Alabama Pesticide Applicators License
 - ✓ Possible future growth in responsibilities (e.g., Cahaba River Park)
 - ✓ Department-wide responsibility for overtime scheduling and safety
 - ✓ Effectively the assistant to the Parks Superintendent
- **Administrative Support:** Some administrative work (e.g., time and leaving accounting for all employees) now is done by the Parks Crew Supervisor, an unusual assignment. This work appears better placed with the Office Manager.

► **Staffing:**

- **Additional Employees:** The funding of the 16th position, a Laborer, in the current fiscal year satisfies, in our opinion, the immediate need for an additional position in the Parks Department. Assuming the Parks Board and City Council agree with the Superintendent's higher expectations for parks and, particularly, islands, the Route Crew may need another Laborer in the future.
- **Crew Rotations:** The Complex and Route crew members (Skilled Laborers and Laborers only) rotate every two weeks (formerly monthly). The Labor Supervisors do not rotate. The Parks Crew does not participate in crew rotations.
- **Training and Cross-Training:** Work performed is maintenance in nature. Training requirements, except for supervisors, is technical (equipment use, maintenance techniques, and the like). The Parks Superintendent would like to increase technical training and cross-training across crews.
- **Pesticide Licenses:** The Parks Superintendent would like members of the Odd Job Crew to get their Alabama Pesticide Applicators License, which covers herbicides, insecticides, fungicides, etc.
- **Small Engine Mechanics:** Mowers, blowers, and other parks equipment is maintained primarily by a member of the Odd Job Crew. Some more complex work is contracted. In the past, Parks had a Small Engine Mechanic position.

E. OPERATIONS MANAGEMENT

1.) The Mercer Model for "Managing the Numbers"

Mercer strongly believes in the value of "Managing the Numbers" in all departments, but most especially in construction and maintenance operations where productivity and prioritization is critical. Elements of an effective Operations Management program include:

- **Operational Plans:** In conjunction with the priorities of elected officials and senior managers as expressed in government-wide Strategic Plans, budgets, and other documents, departments should develop Functional Business Plans that define:
 - Inventories and condition assessments for public infrastructure
 - Strategies, detailed goals and objectives, and a list of work activities
 - General schedules for projects, preventative programs, recurring work, and (from prior experience) allowances for anticipated emergencies
 - Resource requirements (people, equipment, facilities, materials) and planned utilization of these resources
 - Funding needs in operating and capital budgets to carry out the plan
 - Management organizational plan and programs to foster accountability
- **Standards, Guidelines, Policies, and Procedures:** Based on the Business Plan, departments should define technical, efficiency, cost, productivity, and performance standards, both internally and for contractors. These standards should include responsiveness and performance objectives for service requests, complaints, emergencies, and routine work. At an operational level, policies, standing orders, and procedures should be defined for all responsibilities, activities, and tasks to meet these standards.
- **Work Scheduling and Management:** Ongoing and emergency work (based on prior experience) should be programmed into yearly, monthly, weekly, and daily schedules, and work coordinated across crews to accomplish all work assignments. Crew supervisor should ensure work is on schedule and all materials and equipment supplied, as well as coordinate with other crews and senior management. The department director should meet with supervisors weekly and with the entire staff monthly.
- **Time, Workload, and Cost Data:** Departments should collect and compile time data for people and equipment by pre-defined activities and projects, as well as data on work performed and materials used. They then should develop fully-loaded (including supervision, non-productive time, benefits, and central support services) project and activity costs to allow comparisons to cost standards and alternative service providers.
- **Activity and Cost Reporting:** Departments should compile and compare work performed to work standards, goals, and objectives, and plans in order to report monthly to City management and elected officials on recent activities, planned activities, new issues and challenges, and the status of the Functional Business Plan.

APPENDIX I

Recommendations

14. Organization Plan:

- a) **Parks Maintenance Supervisor:** Mercer understands and accepts the reasons stated for creating a Parks Maintenance Supervisor position through a reclassification of one Labor Supervisor.

However, the Labor Supervisor for the Complex Crew also has significant responsibilities, including the ongoing need to satisfy customers (parents and kids) using the ball fields at the complex. In addition, the Labor Supervisor for the Route Crew will have enhanced expectations in the future as noted earlier. These positions also may be candidates for reclassifications in the future.
- b) **Administrative Work:** Move all administrative work (time reporting, payroll, etc.) from the Parks Crew Supervisor to the Office Manager.

15. Staffing:

- a) **Additional Employees:** Except for our comment about the Route Crew, current staffing is adequate, assuming daily absences for vacation and sick leave average 1-2 people. See the Human Resource Management section for comments on controlling employee absenteeism.

The Parks Superintendent should discuss the idea of higher standards for the appearance of parks and island with the Parks Board and City Council. Assuming these bodies agree, add one position to the Route Crew for a total of seventeen. All crews would then have at least three people assigned.
- b) **Crew Rotations/Cross-Training:** Consider adding the Parks Crew to the rotation plan to enhance skill levels and cross training across the work force
- c) **Training:** Develop a Training Plan that starts with a *Skills Requirement Matrix* for each budgeted position. These skills would include pruning techniques, knowledge of plant and shrubs, pesticide application, and care of sports fields as identified by the Parks Supervisor. Then develop an ongoing training program to ensure worker skills are adequate for the work assigned.
- d) **Pesticide/Herbicide Licenses:** We encourage the Odd Jobs Crew to get these licenses.
- e) **Small Engine Mechanics:** Although we don't believe Parks needs a dedicated Small Engine Mechanic, the member of the Odd Job Crew working on equipment should take training, as needed, to become certified to work on this equipment.

Findings

- **Operational Plans:** Parks has not prepared a complete inventory of public infrastructure (e.g., signs, trees, parks amenities) and has not prepared conditions assessments for these assets. The department, however, has an excellent knowledge of assigned infrastructure, and routinely visits and plans in each park, island, and playing field to visually note conditions and maintenance needs.

The department lacks a software system to inventory, manage, and maintain these assets. The City's GIS system, however, may help with this inventory. For example, the department did not have readily-available acre statistics for city parks to use in this study. The Parks Superintendent used Google Maps to estimate acreage for this report. Software products to manage assets and operations (e.g., work orders) are cataloged by the American Public Works Association in its annual Buyers Guide. Several noteworthy vendors are: *Alden Systems (in Birmingham)*, *Cartograph*, *CHITech Systems*, *Cityworks*, *Logic Concepts*, and *PubWorks Tracker*.

The City through its urban planning program has not developed a long-range *Parks and Recreation Master Plan* to assess community needs for infrastructure and programs and develop a plan for meeting these needs. As noted earlier, playing and practice fields may have availability issues in a few years. The Citizen Survey gives high marks to what is in place today, but does not provide a clear guideline as to what is needed in the future.
- **Standards, Guidelines, Policies, and Procedure:** Most standards, guidelines, policies, and procedures are informal and based on long-experience with maintenance and operations responsibilities. Again, however, Parks employees have developed a good understanding of expectations in performing their work and are committed to excellence. Parks performs many recurring and seasonal tasks that supervisors, crew leaders, and employees appear to understand and perform well. And, the Parks Superintendent is interested in codifying these guidelines.
- **Work Scheduling and Management:** Work schedules follow weekly or seasonal schedules that are well known to each crew. Except for the Odd Jobs crew, which receives work assignments each morning from the Parks Superintendent, the work week follows long-established patterns for mowing and trimming, trash collection, Complex services, and the like. Work requirements follow sports seasons for the Complex and Turf Crews to ensure fields and amenities are ready for opening day.

Crew supervisors work consistently with crew members throughout the day and are fully aware of resource and other needs. The Parks Superintendent coordinates informally with each crew supervisor in the morning, at lunch, and at the end of the day as needed, but management team meetings are rare.

- ▶ **Time, Workload, and Cost Data:** Collection of time, work accomplished, and cost data to "manage the numbers" is limited. An automated Work Management System is not used. Interestingly, the National Recreation and Parks Association says smaller Parks Departments seldom use this type of automated tool to manage and track work. Mountain Brook seems in the edge of whether or not to expand automation of this data. In any case, the process and system need to be relatively simple.
- ▶ **Activity and Cost Reporting:** Reports on Parks activities focus on "what we did this month," which the Park Superintendent presents to the Parks Board at their meetings. Cost reports are not prepared below the level of the operating and capital budgets.

Recommendations

16. Operations Management: We support the Parks Superintendent's interest in improving the process of "managing the numbers." We encourage development of:

- Annual asset inventories and condition assessments
- Annual operations plans for each crew that incorporates the findings of the inventory and condition assessments
- Standards and guidelines for major non-construction activities, starting with maintenance of traffic islands assigned to parks
- Written policies and procedures for major maintenance activities
- Expansion of written annual/seasonal and monthly/weekly schedules for each crew
- Activity and cost reports for major activities performed by each crew (e.g., for each large park, islands as a group, the Complex, playing fields)
- Weekly management team meetings (crew leaders and office manager)
- Monthly staff meetings, perhaps in conjunction with the monthly safety meeting

Compilation of information and reporting will be difficult until Parks acquires and implements an automated Asset and Work Management System. We suggest the department explore the capabilities of *emGovPower's* work order and activity reporting system used by the DPW Garage as a possible tool to support "managing the numbers." Also, Parks should explore the capabilities of the City's GIS and system from other vendors listed in the APWA Buyer's Guide, including Alden Systems located in Birmingham.

Like in Public Works, extension of the lunch hour due to travel time to/from the Parks yard likely reduces the productivity of the Route, Parks, and Turf Crews. We suggest the Parks Superintendent work with each crew supervisor to optimize daily work routes to reduce travel time around lunch and to ensure the return time at the end of the day is optimized at 3:10 to 3:15 PM, depending on the need to cleanup and recharge materials and tools for the next work day. In the mornings, crews leave the yard for work assignments at a reasonable time.

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- ▶ **Facilities Management:** The new Parks facility is a significant upgrade from the old sheds at the top of the hill. When considering functionality of the complex, however, a few issues are evident:

- Parking is limited
- Vehicle flow is restricted as vehicles move between the building and the fence at the rear drop off
- Water runoff at the back of the facility feeds into materials piles
- Additional security cameras are needed (per staff interviews)

Existing parks, for the most part, are wonderful, although some amenities are aging (lights, drinking fountains). The City, however, lacks some parks facilities and recreation services commonly found in communities your size:

- Arts and Crafts Programs
- Dog Park
- Public Swimming Pool
- Recreation Center with gym(s) and exercise facility
- Senior Center and Programs
- Skateboard Park

Stakeholders interviewed for the study say some of these facilities and programs are available through private gyms and country clubs located in the City.

A field lighting study is funded through the current budget.

The number of practice/playing fields, per Mountain Brook Athletics, are near capacity for current recreation and sports programs. In a few years, fields may not be adequate to meet demands per Mountain Brook Athletics.

Through the Parks Board, citizens can propose memorials for friends and relations. A typical memorial is a bench in Jemison Park.

Facility rental can be requested online through the City's web site.

- ▶ **Financial and Budgetary Management:** The City provides well for Parks' operating and capital needs, and manages money conservatively. A few department-wide issues, however, are evident:

- **Budgeting:** The City's budgeting process and the Parks budget is primarily financial with limited formal documentation and consideration of goals and objectives, planned activities and projects, and return on investment.

The Parks budget allocates funds to one operating cost center and to capital projects. The budget worksheets provide lots of details and explanations at the account level. It's easy to read and understand.

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F. RESOURCE MANAGEMENT

The Resource Management section presents general findings, issues, and recommendations for six Resource Management functions:

- ▶ Equipment Management,
- ▶ Facilities Management,
- ▶ Financial and Budgetary Management,
- ▶ Materials Management and Purchasing,
- ▶ Personnel Administration/Human Resource Management, and
- ▶ Technology Application.

Findings

- ▶ **Equipment Management:** Equipment is well-provided by the City (the City is said to be "very generous") and well-managed and maintained by Parks. Only a few issues or needs were expressed by employees:

- Parks must borrow Public Works' bucket truck and it may not be available
- A tractor needs to be replaced and a trencher attachment purchased
- Some weed eaters and blowers are getting old
- Need a leaf vacuum
- Need a "stick" edger (\$250)
- Short a few tools

Equipment maintenance performed by the Odd Jobs Crew appears to meet department needs. More difficult tasks or work on large mowers is contracted out. The department had a Small Engine Mechanic in the past.

Work on individual pieces of equipment is tracked on an Excel spreadsheet, with a page for each piece. Basically this spreadsheet serves as a work log.

Vehicle location is not tracked with an on-board computer tracking system, which is an increasingly common feature in the public sector, particularly for equipment moving across the city. This feature might be beneficial for the Route, Parks, and Turf Crews that operate across the City.

Vehicles are fueled at the Public Works Yard, which is not particularly convenient to the Parks yard. Area gas stations, if P&R used fuel cards, also are not particularly convenient to Parks and Recreation. The small tank at Parks is for mowers and the like.

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- **Safety and Training:** Parks holds a monthly safety meeting and the Parks Crew Supervisor is on the City's Safety Committee, which meets quarterly. At the department Safety Meeting, Parks employees can ask the Superintendent general questions. The department had a Safety Manual that is posted by the time clock.

Training for new hires is informal and on-the-job. Similarly, employee training generally is informal and related to technical functions of the job (e.g., mower operation). Parks does not have a position-by-position Training Plan.

The Parks Superintendent has ambitions to expand and improve training, particularly to improve job performance and the condition of parks, as well as for the Odd Job Crew to get certifications.

Supervisory training is available through the Jefferson County Personnel Board.

A mandatory drug test program is in place and the Park Superintendent is committed to making sure all employees participate.

- **Succession Planning:** Last fall's hiring of a new Parks Superintendent has resolved succession needs for the foreseeable future.

- **Technology Application:** As noted earlier, the department has not automated asset and work management functions via information systems solutions. We understand *emGovPower*, which is used to manage the DPW's fleet operation, has work order and inventory control modules that might be used by Parks.

As noted in the DPW study, GIS is used in a limited way, primarily for maps. The City has not located and inventoried many city assets (e.g., parks, signs, trees), as a first step to documenting assets condition and maintenance activities needed to keep these assets up to standards.

Parks uses Microsoft Windows 7 and Microsoft Office 2003, both of which are behind most current versions. The Parks facility is connected to the City's network. IT support staff from the Finance Department are said to do an excellent job in support of Parks' IT needs.

- a) **Personnel Administration:** Work with the Personnel Board to review the classification and maintenance-related work performed by the Parks Crew Supervisor as a foundation for potential reclassification to Parks Maintenance Supervisor. Do not consider administrative work that should be shifted to the Office Manager. Include all Labor Supervisors in the reclassification process.

Enhance the Safety and Training Programs, particularly the training of new hires, skill enhancement for current employees, and development of a formal Training Plan.

Either expand the monthly Safety Meeting to include general departmental topics or have a second meeting for general topics. In addition, hold weekly management team meetings.

With the assistance of the Finance Director (also the HR Director) create and implement an Employee Absence Policy to cover vacations, sick leave, and other leave, with a particular focus on morning call-ins. Track sick leave used by each employee and set an annual goal that mirrors industry best practices (perhaps no more than 6 days per year?).

Develop rewards for cost-saving or efficiency-gaining suggestions and for the employee of the month/year.

Ensure the Drug Test Program covers all employees over the period of two years.

- f) **Technology Application:** Expand application of technology to asset and work management, including GIS. But, don't make the system so complicated it bogs down Parks staff in data entry, which means tracking only major activities and not detailed tasks.

As needed, upgrade Microsoft products to most current versions (perhaps a citywide issue).

Recommendations

17. Resource Management:

- a) **Equipment Management:** In the next budget cycle, the Parks Superintendent should work with Parks employees to identify all equipment and tool needs, including the items listed in our findings.

The Odd Jobs Crew should continue to maintain small engine equipment, but as noted earlier should get certifications as appropriate. The Excel spreadsheet is a reasonable way to track repairs until Parks has an Asset Management Information System.

Consider the value of vehicle tracking software to track the location and routing of P&R trucks and crews.

Seek more convenient fueling options, most likely private gas stations using fuel cards.

- b) **Facilities Management:** The new facility is excellent and a huge upgrade from the prior facility, but has some structural limitations in parking and vehicle flow as noted in the findings. The water run-off and security camera issues appear to be easily solvable.

The City needs to commission a *Parks and Recreation Master Plan* to be overseen by the City Planner. This plan typically is a component of the City's General or Comprehensive Plan, along with the Traffic Plan, Facilities Plan, and Drainage Plan. The plan would:

- ✓ Inventory current facilities and programs,
- ✓ Assess citizen and community interests for the future, perhaps through a survey or at least stakeholder and citizen focus groups,
- ✓ Describe parks and recreation trends nationally, and
- ✓ Project community needs into the future, with a focus on emerging sports and the number of playing/practice fields.

- c) **Financial Management:** The Parks Superintendent should include goals and objectives and performance measures in Parks' budget submission to go beyond numbers to something like a return on investment.

With the City's help, the Superintendent should review *emGovPower's* capabilities to automate more financial functions, such as payroll and inventory control.

All financial and administrative functions should be shifted to the Office Manager.

- d) **Materials Management:** Increase the department's purchasing authority to \$1,000, if not already implemented after the Public Works study, based on levels applied in other Mercer clients. Increase the number of people on store accounts and P-cards (perhaps all Skilled Laborers?) to improve crew efficiency.

IV. IMPLEMENTATION

This chapter of the report presents an Implementation Process, Schedule, and Issues and Challenges to support implementation of recommendations in the Mercer Report.

A. IMPLEMENTATION PROCESS

The Implementation Process began early in the project as the consultant met with public officials, City management, and DPW managers and staff during fact finding activities and the review of preliminary ideas. The process continued as we presented and reviewed the Draft Reports. The process to implement the recommendations is based on a structure of Oversight and Management, Technical Actions and Coordination, and Monitoring and Reporting.

Oversight and Management

The City Manager is the natural person to manage and oversee the implementation process and periodically report to the City Council. His role should include:

- General oversight of Parks implementation actions.
- Facilitation of meetings and reports.
- Policy development, review, and decisions.
- Contract and agreement review and approval.
- Finance and budgeting.
- Communications and public relations.

Technical Actions and Coordination

In support of the City Manager, the Parks and Recreation Superintendent, and Parks supervisors should serve as the Implementation Management Committee for the Parks and Recreation Assessment. This group would be responsible for:

- Development of detailed implementation plans
- Supplemental analyses that may be required.
- Management and tracking of progress in implementing recommendations.
- Development and implementation of new policies, organization and staffing plans, work processes, business practices, etc.
- Interagency, interdivisional, and interdepartmental coordination.
- Measurement and presentation of budgetary impacts and changes.
- Development of implementation activity and performance reports to the City Manager.

Similarly, the Parks Superintendent, as needed, would organize Technical Committees for Specific Recommendations. These committees would include Parks supervisors and employees, as well as City management such as the City Planner, as required for each recommendation. These committees would have duties similar to the Implementation Management Committee.

Reporting and Monitoring

The Department Committee should receive reports from the Technical Committees, then provide quarterly Status/Progress Reports to the City Manager for review and action.

These Quarterly Reports should cover:

- Progress to date on the implementation of the twenty-four strategies.
- Issues, obstacles, and changing situations affecting implementation.
- Services delivered and performance against agreed upon standards and specifications.
- Upcoming activities in the quarter to follow.

The Manager would incorporate these reports into his Quarterly Reports to the Mayor and City Council until all recommendations are implemented.

C. IMPLEMENTATION PLAN AND SCORECARD

Implementation Plan

Major Implementation actions are identified on Table 6 that follows. For each action item the plan identifies:

- A Reference to the page in the text where the recommendation is discussed.
- A priority Ranking.
- A suggested Completion Date.
- The person(s) primarily responsible for implementation of each recommendations.
- Comments and explanations, and
- Costs and/or Savings.

Key Implementation actions and timetables are highlighted below:

- Track and take action on Parks-controlled issues and opportunities in the employee surveys and questionnaires by late summer of 2014 and reapply the surveys in late 2015 to measure progress.
- Update Park' values and define goals, objectives, and performance measures related to the mission by the end of 2014.
- Continually assess the mix of in-house and contract/collaborative services.
- Based on final approval by the Parks Board and City Council regarding a "higher level of service," adjust the staffing plan in the next budget to add a Laborer position, and watch for staffing implications of "managing the numbers" over time.
- Improve operations and resource management issues and challenges over the next year or two, particularly "managing the numbers," succession planning, and classification.
- Research opportunities to expand automation of Parks functions in 2014, particularly in the areas of asset and work management, GIS, and financial accounting, then implement in 2015.

Recommendations

18. Implementation Process and Plan: In the very near future, set up the implementation process (management, committees) as detailed earlier and finalize the Implementation Plan in Exhibit 9.

APPENDIX I

B. IMPLEMENTATION ISSUES

The following implementation issues and constraints need to be resolved to ensure the community makes progress on implementing recommendations in the Mercer Report.

Mayor and City Council

- Ensure the City's Strategic Direction is clear and Parks fully understands it role and citizen expectations. Commissioning the *Parks and Recreation Plan* is a key activity in clarifying future needs.
- Continue to invest in Parks Infrastructure and resources and services.
- Continue to work with the Parks Board to ensure it continues to have strong members.

City's Management Team

- Assist Parks in facilitating development of the Parks and Recreation Plan. (City Planner)
- Assist Parks as it explores automation of asset and work management processes, expands use of GIS, and applies new modules from *emGovPower*. (Finance Director and IT support staff)
- Work with the Personnel Board on classification and other human resource management issues. (Finance Director)

Parks Board

- Assist in defining the meaning of a "higher level of service" for islands and parks.
- Encourage development of a few, meaningful performance measures that are tracked throughout the year and reported monthly.

Parks and Recreation Department

- Review/update departmental values to ensure all employees understand and buy into them.
- Resolve any employee survey or questionnaire issues within Parks' control.
- Continue to evolve Parks' system for "managing the numbers" based on the Superintendent's goals and Mercer's *Model for Managing the Numbers*.
- Work with the City and the Personnel Board on classification and other human resource management issues, particularly the Absence Policy.

Table 6
Preliminary Implementation Plan for the P&R Study

RECOMMENDATION	PAGE	RANK	RESPONSIBILITY	\$\$\$ IMPACT
1. Track Survey Issues	24	B	Parks Superintendent	None
2. Future Use of Surveys	24	B	Parks Superintendent	\$3,000 to redo
3. Track Questionnaire Opportunities	26	B	Parks Superintendent	None
4. Future Use of Questionnaires	26	B	Parks Superintendent	None
5. Adjust the Management Philosophy	30	B	Parks Superintendent	Supervisory Training
6. Future Use of MPP	30	B	Parks Superintendent	None
7. Legal Structure	31	N/A	No Changes	None
8. Develop a P&R Vision	32	A	City Manager P&R Board Parks Superintendent	See Strategic Direction
9. Create a Citywide Friends of the Parks organization	33	A	Mayor & Council City Manager P&R Board Parks Superintendent	None (a net fund-raiser)
10. Implement a Strategic Planning Process	37	A	Mayor & Council City Manager P&R Board Parks Superintendent	Staff Time
11. Develop a Functional Business Plan	37	A	P&R Board Parks Superintendent Parks Staff	Staff Time
12. Improve Collaboration with Community Partners	41	A	Mayor & Council City Manager P&R Board Parks Superintendent	Staff Time
13. Enhance Maintenance Services	41	B	Parks Superintendent	Implement DPW Work Order System
14. Adjust the Organization Plan: (a) Parks Maintenance Supervisor (b) Administrative Works	44 44	B A	Mayor & Council City Manager P&R Board Parks Superintendent	(a) Upgrade (b) None
15. Adjust Staffing and Assignments: (a) Add a Laborer (17 th position) (b) Other	44 44	A B	Mayor & Council City Manager P&R Board Parks Superintendent	(a) \$30,000 (b) None
16. Improve Operations Mgt.	47	A	Parks Superintendent	
17. Improve Resource Mgt.	52	B	Parks Superintendent	\$20,000 for Parks Master Plan
18. Track Implementation Progress	57	A	All	Staff Time

V. EXHIBITS

This chapter of the report provides eight exhibits that provide data and analytical tools to support our findings and recommendations in the text of the report.

- > Exhibit 1: P&R Organization Plan
- > Exhibit 2: Results of the SWOT Assessment
- > Exhibit 3: Results of the Employee Surveys
- > Exhibit 4: Master Employee Survey Document
- > Exhibit 5: Master Organizational Questionnaire
- > Exhibit 6: Master Management Philosophy Profile
- > Exhibit 7: Performance Indicators in Public Services
- > Exhibit 8: Mercer's Decision Criteria for Contracting

INSERT EXHIBIT 1 HERE AND DISCARD THIS PAGE!

Exhibit 2

RESULTS OF THE SWOT ASSESSMENT

The SWOT Assessment compiles findings from interviews with City officials, members of the Parks and Recreation Board, department employees, and external stakeholders (e.g., athletic association, school principals and athletic directors, and landscape architect) in order to identify Emerging Issues and Challenges.

The assessment identifies:

- > **Strengths:** Current strengths, areas of excellence, high-value services, areas receiving customer/stakeholder praise, and the like. These strengths should be protected and enhanced by the Management Study.
- > **Weaknesses:** Current weaknesses, areas needing improvement, low-value services, areas receiving customer/stakeholder complaints, and the like. These weaknesses should be resolved or significantly improved by the Management Study.
- > **Opportunities:** Opportunities are future opportunities, challenges, ideas, alternatives, and comparative examples that may be applicable to the City. These opportunities should be incorporated into recommendations for future service expansions, enhancement, and reengineering by the Management Study.
- > **Threats:** Threats are national, regional, and local threats that would cause the "wheels to fall off" and compromise the organization's ability to provide services per the expectations of city officials, customers, and stakeholders. These include national recessions; the impact of federal and state laws; natural disasters; resource shortages; facility and equipment limitations; loss of key employees, and the like.

When recording issues and ideas in the assessment, we look for themes across the group of interviewees. We present a list of key issues and ideas, as well as lists for sub-categories such as:

- > **City Officials**, which includes, as appropriate to each client, elected officials, City management, City support departments, and advisory boards and committees.
- > **External Stakeholders**, which includes customers, citizens, collaborative partners, and regulatory agencies.
- > **Department Employees**, full-time, part-time, seasonal, and imbedded contractors.

APPENDIX I

1.) Overall SWOT Assessment with Key Ideas and Issues

Major Current Strengths

- > Strong, well-coordinated Park & Recreation Board
- > New Park Superintendent ("lots of weaknesses have been fixed" with her coming, including organization plan, staffing, and employee attitudes)
- > Skills, experience, and teamwork of departmental staff
- > Quality and condition of parks and athletic fields ("incredible," "outstanding")
- > Paths and Sidewalks Plan nearly implemented
- > Schools-Parks/City and Associations-Parks/City relationships

Major Current Weaknesses

- > Need a long-term vision and plan for parks and recreation (Comprehensive Parks & Recreation Plan and associated Parks Department Functional Business Plan)
- > Need more playing fields, particularly big fields for practices
- > Impact of traveling teams on opportunities for recreational-level sports
- > More internal structure, systems, and controls (e.g., enforced tardiness policy)
- > Is the department on cruise control?

Major Future Opportunities and Challenges

- > Cahaba River Park
- > Community Center with gyms (but lack of support in the past)
- > Keeping up with participation in emerging and growing sports, like lacrosse recently
- > Provide adequate opportunities for participation at the recreation level for older kids

Major Threats

- > National recession affecting the local economy and city revenues
- > Cuts in staffing or equipment replacement funding
- > Hiring employees with the wrong attitude

2.) City Officials, including the Park Board

SWOT comments are listed below for City Officials (Council Liaison, City Manager, Finance Director, and City Planner) and the Parks Board. Comments listed multiple times are at the top of each category and bolded.

Current Strengths

- Strong Parks Board (work well together, "ongoing conversation," "in sync")
- New Superintendent and staff
- Director of MB Athletics
- Cahaba River Park (and parks in general)
- Paths and Sidewalks Plan
- Champion-driven process for identifying and providing parks and programs
- Public proactively expresses needs
- Field condition and scheduling
- Parks, trails, sidewalks, and beautification
- Expectations are surpassed

Current Weaknesses

- Need more fields, particularly Big fields to cover practice needs
- Planning for P&R can be driven by personal rather than community interests
- Need a Parks & Recreation Plan and a Functional Business Plan for the department
- Parks programs said to be mature and on "auto-pilot."
- Lost staff time around lunches
- "Byzantine" structure of athletic providers (no "clearinghouse")
- Reactive approach to implementing identified need (wait for land)
- High cost of land in the city (land-locked)
- Limited opportunities for regional partnerships for athletics
- City lacks a Recreation/Community Center (but alternatives available in the private sector and at country clubs)
- Need more gyms
- Need more staff with new park coming
- Maintaining triangles (100+)
- Need a Dog Park
- Need a governing board instead of an advisory board

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3.) External Stakeholders

SWOT comments are listed below for the City's landscape architect, athletic associations, and City schools. Comments listed multiple times are at the top of each category and bolded.

Current Strengths

- Parks does a great job on fields ("incredible" and "outstanding")
- Schools-Parks/City relationship and partnership (a community effort to raise Mountain Brook's kids)
- Trails and Sidewalks Plan
- Turf Crew

Current Weaknesses

- Impact of traveling teams on recreational sports
- Need a long-term vision for Parks & Recreation to include programs, fields, recreational services
- Enough staff at the Sports Complex?
- Minor needed improvements at the Sports Complex and other parks
- Mowing work might be better scheduled with schools to avoid the infrequent times the schools have early morning activities outside

Future Opportunities and Challenges

- Community Center with gyms
- Providing facilities and fields for emerging or growing sports

Threats

- None identified

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Future Opportunities and Challenges

- Cahaba River Park
- Community Center (but lack of support in past)
- Supplemental fees for non-residents
- Keeping up with participation in emerging and growing sports (like lacrosse)
- Few adult and senior programs at present
- Greater "ownership" of triangles by neighborhoods
- Supplemental fees for non-residents non-property owners
- Managing "memorials" in the parks
- Providing recreation-level sports opportunities as children get older and face the competition of traveling teams (What to do with kids "left behind?")

Threats

- None identified

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4.) Parks Department Employees

Current Strengths

- Quality of services (make the city look good and citizens proud)
- Dependable, consistent, and talented staff
- Parks, Complex, and fields
- Staff comradery and teamwork
- Parks staff says a lot of weaknesses have been fixed with the new Superintendent (e.g., organization, attitudes)
- Safety record
- Cross-training and variety of staff skills
- Ability to work with the public
- Islands and playing fields in great condition
- Cleanliness of parks

Current Weaknesses

- No set policy on tardiness or absences (only vague guidelines)
- Be more involved with other departments
- Increase awareness of details in grounds maintenance
- Some equipment is needed, needs to be replaced, or needs to be upgraded
- Some supervisors could help more with crew's work
- Clean the road signs
- Rotate crew members among crews

Future Opportunities and Challenge

- Establish and enforce rules
- Advancement opportunities (but limits with JCPB)
- Training for current jobs and to support promotion (e.g., supervising)
- Ensure consistent workload within and across crews
- Better communications
- Upgrade the Sports Complex (lights, trash cans, water fountains, rest rooms, heaters)
- Upgrade some equipment (e.g., blowers)
- Limit large truck traffic in the villages

Threats

- Not getting the job done or done right due to too few people
- Hiring employees with the wrong attitudes
- Not keeping playgrounds up to code
- Economy and national policies

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Exhibit 3

RESULTS OF THE EMPLOYEE SURVEYS

The Mercer Group asked employees of the Mountain Brook Parks & Recreation Department to complete several employee surveys and questionnaires. Master copies of these documents are provided as Exhibits 4, 5, and 6 that follows this exhibit. These tools, along with interviews and data collection, are Mercer's primary means of understanding and assessing the emergency services agencies.

1.) Overview of the Surveys

Mercer applied four surveys and one questionnaire that all employees completed:

- > Values Survey,
- > Organizational Climate Survey (OCS),
- > GRIPES or Management Practices Survey,
- > Resource Management Survey, and
- > Organizational and Job Duty Questionnaire.

In addition, we asked supervisors to complete our Management Philosophy Profile.

In total, we processed fourteen completed responses from Parks & Recreation employees, which is close to a 100% response rate. Because of the relatively small number of employees in the department, survey results are not reported by division or crew. Instead we present the survey data in three ways.

- > All Employees (14)
- > Supervisors (6), including the Superintendent, Office Manager, Turf Grass Supervisors, and three Labor Supervisors
- > Non-Supervisors (8), including Skilled Laborers (4) and Laborers (4)

Information in the questionnaires is used for the SWOT Assessment, the organization and staffing review, and the operations evaluation.

> **GRIPES SURVEY:** The "Do You Have GRIPES?" survey help Mercer understand key management practices in each agency. Factors rated are:

- Growth: Organizational Support and Training Hours
- Respect: By supervisors, senior managers, elected officials and other departments, and through rewards
- Information: To do your job well and to understand policies and business decisions
- Potential: The degree to which the agency taps employee skills and experience (not a measure of productivity!)
- Empowerment: Adequacy of authority to make decision on the job
- Support: From administrative staff in the agency, senior agency managers, central administrative support (in the County and Hospital), and from elected officials and others downtown

Most factors are rated from No/None to Always, which are converted into scores of 1, 2, 3, 4, and 5, with Potential rated from 0% to 100%. Scores also are compared to Mercer's Minimum and High Performance Standards on the tables that follow.

> **RESOURCES SURVEY:** Asks employees to rate and comment on the following nine categories of resources:

- Staffing
- Facility
- Vehicles
- Tools
- Gear
- Office Equipment
- Computers
- Materials
- Other Resources (contracts, leases, technical support, capital projects, fees)

Factors are rated as Poor, Fair, Adequate, Good, and Excellent, which are converted into scores of 1, 2, 3, 4, and 5. Scores also are compared to Mercer's Minimum and High Performance Standards on the tables that follow.

2.) Description of Mercer's Employee Surveys

> **ORGANIZATIONAL CLIMATE SURVEY (OCS):** Presents a list of sixty statements or questions designed to measure the health of the culture of each agency based on the following twelve cultural factors (five questions for each factor).

- Career Opportunities
- Compensation and Benefits
- Employee Involvement
- Information and Communications
- Management and Supervisory Competence
- Understanding of Organizational Goals
- Productivity and Services
- Quality Emphasis
- Receptivity to Change
- Working Conditions
- Work Group (Managers and Supervisors) Problem Solving
- Work Group (teams) Coordination and Cooperation

Scoring options are Strongly Agree, Agree, Undecided, Disagree, and Strongly Disagree. The results are compiled into three scores (Strongly Agree + Agree, Undecided, and Strongly Disagree + Disagree). Scores compared to Mercer's Minimum and High Performance Standards are shown on the tables that follow.

> **VALUES SURVEY:** Asks employees to identify Key Values using sample values in the public sector to help frame their response. The survey also asks these questions:

- Are values documented in a formal Values Statement?
- Are values given to employees and posted in work sites?
- Are values created with employee input?
- If a large organization, are division/unit values created and linked to the overall Values Statement?
- Are values lived, even if informally, on a daily basis?

We expect the number of Yes answers to be at least double the number of No answers.

> **PERSONNEL PRACTICES SURVEY:** Asks employees to rate and comment on the following ten human resources/personnel practices:

- Hiring Process
- Career Ladders
- Training
- Grievances (initiated by the employee)
- Discipline (initiated by the employer)
- Performance Evaluations
- Pay
- Benefits
- Labor Relations (related to union employees so note rated in this study)
- Morale

Factors are rated as Poor, Fair, Adequate, Good, and Excellent, which are converted into scores of 1, 2, 3, 4, and 5. Employee scores also are compared to Mercer's Minimum and High Performance Standards on the tables that follow.

> **MANAGEMENT PHILOSOPHY PROFILE (For Supervisors Only):** Asks managers and supervisors only to define their current and targeted philosophy toward managing based on the following twelve criteria with each rated on a continuum from the first to the second factor.

- Personality: Type (introverted to extroverted)
- Personality: Risk-taking (limited to extensive)
- Personality: Initiative (reactive to proactive)
- Personality: Solutions (feelings to analysis)
- Work Focus: People (internal to external)
- Work Focus: Work (details to broad issues)
- Work Focus: Resources (things to people)
- Work Focus: Time (past to future)
- Relationships: Status (boss to empowering)
- Relationships: Delegation (central/limited or decentral/lo)
- Relationships: Decisions (open or closed)
- Relationships: Communications (informal to formal)

3.) Calculation, Analysis, and Reporting of Survey Results

Organizational Categories

Because the department only has 15 employees, we did not score the surveys by Organizational Categories (e.g., Administration, Complex Crew, Parks Crew, Route Crew, and Turf Crew). A small number of employees in each category (2-4) might compromise confidentiality of individual scores, particularly if we reported scores in each category by Employee Type.

Employee Types

The Mercer Group reviewed each survey document, scored them, and compiled scores in three ways:

- > All Employees
- > Managers and Supervisors (Employee Type 001)
- > Other Employees (Employee Type 002)

Employee Comments

Comments on each survey were reviewed by the Mercer project manager and added to the SWOT Assessment or Emerging Issues list, assuming enough employees commented on a given subject.

Reporting the Results

The pages that follow provide detailed reports on the scores for each survey, as well as an analysis of the scores.

Major findings from the surveys are included in the text of the report to highlight low scores, areas needing improvement, and potential action items.

Organizational Climate Survey (OCS)

SUBSCALES	All Employees	Supervisors	Non-Supervisors
Career Opportunities	62.86% / 20.00%	73.33% / 13.33%	55.55% / 25.55%
Compensation & Benefits	38.57% / 18.57%	40.00% / 13.33%	42.50% / 22.50%
Employee Involvement	71.71% / 20.00%	93.33% / 6.67%	55.00% / 30.00%
Information & Communications	82.86% / 7.14%	100.0% / 0.00%	70.00% / 12.50%
Management Competence	65.71% / 20.00%	73.33% / 20.00%	60.00% / 20.00%
Organizational Goals	72.86% / 11.43%	83.33% / 6.67%	65.00% / 15.00%
Productivity & Customer Service	71.43% / 8.57%	86.67% / 6.67%	60.00% / 10.00%
Quality Emphasis	65.71% / 14.29%	60.00% / 6.67%	55.00% / 20.00%
Receptivity to Change	62.86% / 18.57%	80.00% / 16.67%	50.00% / 20.00%
Working Conditions	60.00% / 12.86%	80.00% / 10.00%	45.00% / 15.00%
Work Group Problem Solving (by managers and supervisors)	68.57% / 11.43%	80.00% / 13.33%	60.00% / 10.00%
Work Group Coordination (by crew members)	70.00% / 7.14%	90.00% / 6.67%	55.00% / 7.50%
OVERALL SCORES	67.76% / 13.57%	74.17% / 10.00%	56.09% / 17.34%
NUMBER OF SCORES	Fourteen	Six	Eight
MERCER'S MINIMUM STANDARD	>50% Agree	>50% Agree	>50% Agree
	<40% Disagree	<40% Disagree	<40% Disagree
MERCER'S HIGH PERFORMANCE STANDARD	>60.0% Agree	>60.0% Agree	>60.0% Agree
	<30.0% Disagree	<30.0% Disagree	<30.0% Disagree

Notes: The first score is Strongly Agree + Agree and the second is Strongly Disagree + Disagree
Undecided scores are not reported above
Agree scores under 50% and Disagree scores over 40% are bolded

ANALYSIS OF THE SURVEY RESULTS

- > Overall Scores: Overall, the scores are above the High Performance Standard, with several well above the standard (70+% Agree).
- > Key Subscales: Employee scores for Quality Emphasis (55% Agree) and Productivity & Customer Service (60% Agree) are lower than expected based on Mercer interviews with staff.
- > Undecided: Most Undecided scores are low (at/under 20%) except for employee scores for Working Conditions (40.00%), which is surprising with the new facility; Compensation & Benefits (33.00%); Work Group Problem Solving by managers (30.00%); and Productivity & Customer Service (30.00%).
- > Supervisors and Non-Supervisors: The overall scores are within +/- 18%, which is above the Mercer study norm of +/- 10%. Subscales with significant differences are Compensation & Benefits, Employee Involvement, Information & Communications, Productivity & Customer Service, Receptivity to Change, Working Conditions, and Work Group Coordination (by crew members).

4.) Results for the Mountain Brook Parks & Recreation Department

Values Survey

QUESTIONS	Yes	No
Documented in writing	7	7
Given to all employees or posted	5	9
Created with employee input	2	12
Related to agency-wide values	8	5
Lived each day even if informal	10	3
Key Values Listed in Survey (mentioned in more than 1/4 of the employees surveys)	Community Stewardship Integrity Respect Safety Keep parks clean	
MERCER STANDARD	Yes = at least two times No	

ANALYSIS OF THE SURVEY RESULTS

- > The Values Survey for the Parks & Recreation Department only meets the Mercer Standard in the last question (values are lived daily).
- > The other questions are a toss-up, with very few employees having input to the creation of current values.
- > Therefore, work is needed in updating the department's values with the participation of employees.
- > The first three values above are suggested by Managers (001) and the last three by employees (002).

GRIPES Survey

FACTORS	All Employees	Supervisors	Non-Supervisors
Growth-Organizational Help	2.80	3.17	2.43
Growth-Training Hours	2.30	2.60	2.00
Respect-By Supervisor	3.43	4.00	2.86
Respect-By Senior Manager	3.69	3.67	3.71
Respect-By Elected Officials	2.34	2.67	2.00
Respect-Non-Monetary Rewards	2.52	3.17	1.86
Information-Job Related	3.55	4.67	2.43
Information-Policies & Procedures	3.24	4.33	2.14
Potential (Talents Tapped)	80.5%	90%	71%
Empowerment	3.54	4.50	2.57
Support-By Department	3.68	4.50	2.86
Support-By Management Team	3.84	4.67	3.00
Support-By Support Services	3.24	4.33	2.14
Support-By Elected Officials	3.09	4.17	2.00
OVERALL SCORES	3.17	3.88	2.46
MERCER'S MINIMUM STANDARD	3.00 / 60%	3.00 / 60%	3.00 / 60%
MERCER'S HIGH PERFORMANCE STANDARD	4.00 / 70%	4.00 / 70%	4.00 / 70%

Notes: Scores well under Mercer's Minimum Standard (3.0) are bolded

ANALYSIS OF THE SURVEY RESULTS

- > Overall Scores: Overall, the scores slightly exceed our Minimum Standard, but mainly because of the influence of very positive Supervisor scores.
- > Key Factors: Potential Tapped and Empowerment are very positive for Supervisors, but not Non-Supervisors.
- > Respect and Support: Scores for Mercer clients tend to decline the higher up the supervisor or elected official.
- > Supervisors and Non-Supervisors: The scores are significantly different (1.42 on a 1 to 5 scale), except for Potential, which is positive for both. The difference is particularly great (over 2.0) for Information-Job Related, Information-Policies & Procedures, Support-Support Services, and Support-Elected Officials.

Resources Survey

FACTORS	All Employees	Supervisors	Non-Supervisors
Staffing	3.07	3.50	2.63
Facility	3.88	4.00	3.75
Vehicles	3.61	3.83	3.38
Tools	3.78	4.17	3.38
Gear	3.53	4.17	2.88
Office Equipment	4.00	3.50	4.50
Computers	3.80	4.00	3.60
Materials	4.18	4.17	4.20
Other Resources	4.10	4.00	4.20
OVERALL SCORES	3.77	3.93	3.61
MERCER'S MINIMUM STANDARD	3.00	3.00	3.00
MERCER'S HIGH PERFORMANCE STANDARD	4.00	4.00	4.00

Notes: Scores well under Mercer's Minimum Standard (3.0) are bolded

ANALYSIS OF THE SURVEY RESULTS

- Overall Scores: Overall, the scores are close to our High Performance Standard, but a few Non-Supervisor scores are lower than our Minimum Standard (Staffing, Gear).
- Key Factors: Staffing is rated low by Non-Supervisors, perhaps driven by concerns about the time to fill vacant positions and the new work coming with Cahaba River Park. In addition, the new Superintendent has not had time to fully transition to a new approach to managing staff.
- Supervisors and Non-Supervisors: With only a few exceptions (Staffing, Tools, Gear), scores are within +/- .5 points of each other.

Exhibit 4
MASTER EMPLOYEE SURVEYS
PARKS & RECREATION MANAGEMENT STUDY

Purpose: The Purpose of these surveys is to allow you to express your views about working for the City and for your department.

Codes, Not Names: Your name is not listed on the survey document. Instead, it is coded by the following Organizational Categories and Employee Types. If not already marked, please circle the Organizational Category and Employee Type that apply to you.

ORGANIZATIONAL CATEGORY: 100 – ALL Employees

EMPLOYEE TYPE: 001 – Managers and Supervisors
002 – Non-supervisors

Survey Elements: The survey has four parts that all employees will complete, plus a fifth part for managers and supervisors:

- ORGANIZATIONAL CLIMATE SURVEY (OCS):** Exhibit 4-A presents a list of sixty questions designed to measure the health of the culture of the organization based on twelve cultural factors (five questions for each factor). An overview of the OCS, instructions, questions, and space for your comments are provided. This survey should take about 30 minutes to complete.
- VALUES SURVEY:** What are your department's current Key Values? Exhibit 4-B shows sample values in the public sector that may help you frame your response, and provides a sheet for you to list the values in place in your department. This survey should take about 10 minutes to complete.
- GRIPES SURVEY:** Please complete the "Do You Have GRIPES?" worksheet (Exhibit 4-C) to help us better understand the culture of the organization. Don't feel negative the title of the survey as this was first developed to structure employee comments and issues during a team building and organizational development process. GRIPES will give a quick indicator of organizational culture issues that complements and expands information in the OCS. This survey should take about 20 minutes to complete.

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Personnel Practices Survey

FACTORS	All Employees	Supervisors	Non-Supervisors
Hiring Process	3.99	4.17	3.80
Career Ladders	3.34	3.67	3.00
Training	3.50	4.17	2.83
Grievances	3.32	3.80	2.83
Discipline	3.14	3.40	2.88
Performance Evaluations	3.40	4.20	2.67
Pay	2.86	3.00	2.71
Benefits	4.05	4.67	3.42
Morale	3.82	4.50	3.14
OVERALL SCORES	3.49	3.95	3.03
MERCER'S MINIMUM STANDARD	3.00	3.00	3.00
MERCER'S HIGH PERFORMANCE STANDARD	4.00	4.00	4.00

Notes: Scores well under Mercer's Minimum Standard (3.0) are bolded

ANALYSIS OF THE SURVEY RESULTS

- Overall Scores: Overall, the scores are above the Minimum Standard for both Supervisors and Non-Supervisors.
- Key Factors: Training and Performance Evaluations are slightly below our Minimum Standard and Morale exceeds it.
- Supervisors and Non-Supervisors: The score difference is less than +/- .5, except for much lower Non-Supervisor scores for Career Ladders, Training, Grievances, Performance Evaluations, Benefits, and Morale.

MOUNTAIN BROOK PARKS & RECREATION
Overview of the Employee Surveys

- RESOURCES MANAGEMENT SURVEY:** Exhibit 4-D presents a series of Resource Management issues to be rated, with space provided for explanations of your ratings. This survey should take about 15 minutes to complete.
- MANAGEMENT PHILOSOPHY PROFILE (For Supervisors Only):** Exhibit 6 (in a separate document) asks managers and supervisors to define their current and targeted philosophy toward managing based on twelve criteria. When returned, put it in a separate envelope from the other surveys so the Mercer Group can give specific feedback to individual supervisors without compromising confidentiality on the other surveys. This feedback will NOT be included in the final, written report, but shared privately with each supervisor. We will, however, provide general comments on the management philosophies of supervisors as a group in the report. This survey should take about 20 minutes to complete.

Tips on Completing the Surveys: Fill each survey out as best you can. In some cases, except for the Organizational Climate Survey, a question may not apply. If so, please mark that question "N/A," for Not Applicable, and move on. Usually, the first idea that comes to mind is the best answer. So, move along and don't get bogged down with a lot of analysis and deep thought.

Use of the Survey Information: These surveys and follow-up presentations are your primary inputs to the Mercer Group's work with the city. The questionnaire will be held in the strictest confidence by the consultants and shared only among the consulting team! For our report, we will compile issues and data across the organization in a way that will not compromise your position, job security, or working relationships.

Questions: If you have any questions, please contact Steve Egan, Mercer's project manager, by phone at 770-425-1775 or by e-mail at segan@mercergroupinc.com.

Thank you for your cooperation and commitment to the project.

**Exhibit 4-A
ORGANIZATIONAL CLIMATE SURVEY**

I. INTRODUCTION TO THE OCS

We are interested in your opinion regarding the quality of your work life, including relationships and communications with supervisors, among employees, and with other departments; the adequacy of resources; and the effectiveness of management systems. Remember:

This is not a test - There are no right or wrong answers. Just mark the answer that you think best describes the current situation.

Individual responses are confidential - No one will know how you marked your survey. Only the Mercer Group consultants will see your survey response, and it will include Organizational Category and Employee Type codes only, NO NAMES!

You will receive feedback on the overall results of the survey - We will compile the results of the survey by the organizational categories and employee types described below and recorded on the cover page of your survey form, then report back to you the results of the surveys during an October visit to the City.

ORGANIZATIONAL CATEGORY	CODE NOTES AND COMMENTS
All Employees 100	All employees

EMPLOYEE TYPE	CODE NOTES AND COMMENTS
Managers and supervisors 001	Department, division, section/unit supervisors
Employees 002	All others

If you have any questions or concerns about the coding of your survey, please talk with your department head or supervisor, or call Steve Egan of the Mercer Group at 770-425-1775.

II. INSTRUCTIONS

Please respond to the following sixty statements according to these instructions:

- PREPARATION:** Check that the codes entered on cover page of the survey are correct.

The Organizational Category should roughly compare to your place in the organizational chart, with some units combined to ensure we have a minimum of six people in each group (to ensure confidentiality).

Non-supervisory employees are in the Employee Type (002) and directors, managers, and superintendents are in the Supervisor Type (001).

If you think the codes on your form are wrong, please check with your department head before completing the survey.

- RESPONSE:** Read each statement carefully, then decide how you feel about it.

Circle the response that best expresses your opinion (only one response per question). **Answer ALL questions!** Provide comments after the last question or on additional sheets of paper. Possible responses:

- SA = Strongly Agree
- A = Agree
- U = Undecided (It's OK to be unsure, but try to give an opinion)
- D = Disagree
- SD = Strongly Disagree

- DEFINITIONS:** Some terms used in the survey are defined below.

- Work Group:** The group of people with whom you work most frequently, which could be a crew or an office group.
- Section/Division:** Major organizational units in a department.
- Department:** Parks & Recreation.
Organization: Parks & Recreation unless the question is posed seeking an answer related to working for the City.
- Supervisor:** The person to whom you directly report.
- Work Area:** The location of your office or primary work site.

APPENDIX I

Structure of the OCS: The Mercer Group's Organizational Climate Survey (OCS) is a tool to measure employee views on sixty questions that are compiled in the OCS report into the following twelve subscales:

Organization and Department Goals: The extent to which employees understand the goals of the organization and see the relationship between organizational goals and the goals of their department (or division).

Productivity and Service: The extent to which employees believe that the organization has a strong commitment to service and maintaining an efficient organization.

Quality Emphasis: The degree to which employees feel the organization is committed to maintaining high standards of quality for service.

Management and Supervisory Competence: The extent to which employees have confidence in the knowledge and ability of their supervisors, and feel productive working relationships are easily established.

Information and Communications: The extent to which employees feel that they receive important and useful information from their supervisors, managers, top management, and/or other departments.

Work Group Problem Solving: The extent to which employees feel that managers and supervisors are interested in identifying and solving problems rather than avoiding them or pretending they don't exist.

Work Group Coordination and Cooperation: The extent to which employees feel that the people in their work group work together as a team.

Employee Involvement: The degree to which employees feel that the organization considers their viewpoint important.

Receptivity to Change: The extent to which employees perceive the organization as open and receptive to change.

Working Conditions: The degree to which employees feel that the amount of work expected of them is fair and equitable, and the tools, facilities, and equipment are adequate to do the job.

Career Opportunities: The degree to which employees feel that career advancement is readily available to those who are qualified and seek it.

Compensation and Benefits: The degree to which employees feel that the compensation package provided by the organization is fair and equitable.

III. ORGANIZATIONAL CLIMATE SURVEY

SA - Strongly Agree A - Agree U - Undecided
D - Disagree SD - Strongly Disagree

- | | | |
|-----|------------------------------------------------------------------------------------------------------------------------------------|-------------|
| 1. | Most people understand the goals of our department. | SA A U D SD |
| 2. | We have regular meetings in our department where everyone is encouraged to discuss work-related problems. | SA A U D SD |
| 3. | My supervisor lets people know what is going on, which helps everyone do a better job. | SA A U D SD |
| 4. | There are many ways we could be more productive and efficient, but very few people in the department seem to care. | SA A U D SD |
| 5. | The people in my work group are encouraged to work together as a team. | SA A U D SD |
| 6. | Changes in procedures and work methods are easy to get approved in this department. | SA A U D SD |
| 7. | Quite often, people in our department have to do more than is necessary because the work has not been planned properly. | SA A U D SD |
| 8. | My supervisor believes that the ideas of the people who do the work are important to long-range plans. | SA A U D SD |
| 9. | In order for me to advance in my career, I'll have to seek opportunities in another organization or department. | SA A U D SD |
| 10. | Most employees in this department know what they are expected to do and produce quality work, even if it takes a little more time. | SA A U D SD |
| 11. | If my supervisor would only stop looking over my shoulder, I could get a lot more work done. | SA A U D SD |
| 12. | In comparison with other people I know who do similar work, I'm not paid nearly enough. | SA A U D SD |

- 13. The people in my work group understand how the goals of our group fit into the goals of the department. SA A U D SD
- 14. In our department, we have good ways for dealing with little problems before they become big ones. SA A U D SD
- 15. The information and/or direction we get from other departments is often incorrect, causing us to have to do the work over or correct it. SA A U D SD
- 16. My supervisor encourages us to find ways to do things better. SA A U D SD
- 17. It seems that many of the people that I work with are more concerned about getting recognition for themselves than working together as a group. SA A U D SD
- 18. My supervisor actively seeks out new ideas and approaches for doing things. SA A U D SD
- 19. As a general rule, the equipment, tools, and supplies that are needed to do our work are available when we need them. SA A U D SD
- 20. Lots of times, my supervisor isn't included in important decisions, and he/she finds out about changes after the decision has already been made. SA A U D SD
- 21. In our department, promotions are usually given to the people who deserve them, regardless of how long they've been here. SA A U D SD
- 22. Most employees in this department take a lot of pride in what they do and usually try a little harder to produce quality. SA A U D SD
- 23. My supervisor is someone I can go to when I need help or have a problem. SA A U D SD
- 24. It seems that some people in this department get paid more than they deserve, while others get paid less. SA A U D SD

- 37. The goals of the department have very little to do with the work that I and others in my group do every day. SA A U D SD
- 38. My supervisor doesn't want to hear about problems. He/she pretends they don't exist. SA A U D SD
- 39. The people with whom I work are familiar with the department's policies and procedures. SA A U D SD
- 40. We are often striving to improve service in this department. SA A U D SD
- 41. There is a lot of jealousy and bickering among people in my work group. SA A U D SD
- 42. The department has established ways of doing things, and any suggestions on how to do things differently are usually rejected. SA A U D SD
- 43. The equipment and/or tools that we have in our group make the job easier and the department more efficient. SA A U D SD
- 44. When new procedures or policies are being developed, my supervisor often asks for input from employees. SA A U D SD
- 45. Our department plans for the future by preparing people for future positions through training and education. SA A U D SD
- 46. In our department, the emphasis is on quantity, not quality. SA A U D SD
- 47. My supervisor tries to be "one of the guys/girls" instead of maintaining the distance necessary to effectively lead employees. SA A U D SD
- 48. Most people in the department would agree that our system for determining pay grades is fair and equitable. SA A U D SD

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- 25. Sometimes it seems like one group is going in one direction, and the other groups in the opposite direction. SA A U D SD
- 26. In our work group, we don't hide our problems, we get them out in the open and solve them. SA A U D SD
- 27. The information I need to do my job is readily available in my department through my supervisor. SA A U D SD
- 28. As long as my job gets done, nobody seems to care how much it costs. SA A U D SD
- 29. The people in this department are willing to help each other out when the need arises without worrying about what job they're assigned to or what group they work for. SA A U D SD
- 30. When the need for change is obvious, my supervisor responds quickly and implements the required change. SA A U D SD
- 31. Generally speaking, the department gets a good day's work from everyone. SA A U D SD
- 32. My supervisor often makes and implements decisions without first discussing them with the people who have to carry them out. SA A U D SD
- 33. It seems like we're always bringing in outsiders to fill positions when we have plenty of qualified people right in the department. SA A U D SD
- 34. We spend a lot of time trying to improve our services. SA A U D SD
- 35. My supervisor evaluates people fairly and on the basis of their performance, rather than "playing favorites." SA A U D SD
- 36. Most people in this department believe that our benefit package is fair and better than plans in comparable communities. SA A U D SD

- 49. The goals of our work group and our department are periodically reviewed and discussed with all employees. SA A U D SD
- 50. Many times, we have to create a crisis in order to get anyone to pay attention to our problems. SA A U D SD
- 51. Most of the information I get about what the department is doing comes from the "grapevine." SA A U D SD
- 52. Everyone in my work group understands the importance of providing good service. SA A U D SD
- 53. When conflicts arise in our work group or between our group and another, they are usually handled in a timely and constructive way. SA A U D SD
- 54. It's too hard to get things changed in this department, most people have just learned to accept things the way they are. SA A U D SD
- 55. Some people in the department have to work harder than others because some people don't have enough work assigned to them. SA A U D SD
- 56. In our department, employees are encouraged to be open about their opinions and feelings about work-related problems. SA A U D SD
- 57. Getting ahead in our department is based more on your performance than who you know. SA A U D SD
- 58. There is not enough emphasis in our department on quality. SA A U D SD
- 59. Most people in the department would agree that consideration is given to a person's ability to manage people before they are promoted. SA A U D SD
- 60. I would prefer to be compensated based on my performance rather than getting the same pay increases as everyone else. SA A U D SD

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POTENTIAL Are you allowed and encouraged to work at 100% of your potential? If not, what percentage of your potential are you allowed to apply right now?

By Potential, we mean the skills, experience, and talents you have gained in a lifetime of working and learning. To what degree does the department tap these skills?

Table with 5 columns: 20%, 40%, 60%, 80%, 100%

EMPOWERED Are you given adequate authority to make decisions (or at least influence decisions) and direct your subordinates in order to do your job, meet your objectives, and accomplish your mission?

Table with 5 columns: No, Sometimes, Often, Mostly, Always

SUPPORT Do you get the support (in terms of services, resources, and encouragement) you need to accomplish your mission from administrative support units in your Department?

Table with 5 columns: No, Sometimes, Often, Mostly, Always

From your department head and the department's management team?

Table with 5 columns: No, Sometimes, Often, Mostly, Always

From Purchasing, Personnel, Finance, Information Systems, and other central administrative and support services?

Table with 5 columns: No, Sometimes, Often, Mostly, Always

From governing officials, City management, and others at City Hall?

Table with 5 columns: No, Sometimes, Often, Mostly, Always

Please provide any explanations for your responses to the GRIPES survey on the next page.

Exhibit 4-D RESOURCE MANAGEMENT SURVEY

I. Adequacy of Resources

Please provide a rating (P=Poor, F=Fair, A=Average or Adequate, G=Good, E=Excellent) of the adequacy of the following resources, and provide explanations of the reasons for your ratings.

STAFFING: Number of full-time, contract, temporary, and seasonal people; skill and experience mix; number of supervisors vs. workers; number of support positions; etc.

Rating: _____

FACILITY: Location, size, layout, traffic flow, environmental conditions, parking, etc.

Rating: _____

VEHICLES: Number and mix of vehicles, features/specifications, availability, maintenance, etc. Includes automobiles, trucks, construction equipment, other rolling stock, and the like.

Rating: _____

TOOLS: Number and mix of tools, features/specifications, availability, maintenance, etc. Includes saws, drills, hand tools, shop tools, testing and measurement, analysis, and the like.

Rating: _____

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II. GRIPES Comments

GROWTH: _____

RESPECT: _____

INFO: _____

POTENTIAL: _____

EMPOWER: _____

SUPPORT: _____

GEAR: Number and mix of tools, features/specifications, availability, maintenance, etc. Includes uniforms, weapons, hardhats, shoes, vests, breathing apparatus, and the like.

Rating: _____

OFFICE EQUIPMENT: Number and mix, features/specifications, availability, maintenance, etc. Includes copiers, fax, telephones, desks, chairs, bookcases, and the like.

Rating: _____

COMPUTERS: Number and mix, features/specifications, hardware, software, support services, training, etc. Includes citywide network, desktops, notebooks, handheld devices, GIS, survey equipment, CAD, office automation systems, and the like.

Rating: _____

MATERIALS: Office, maintenance, construction, training, etc.

Rating: _____

OTHER RESOURCES: Contracts and leases, technical support services, capital projects funding, fees and charges for services, operating budget, etc.

Rating: _____

II. Personnel Administration

Please provide a rating (P=Poor, F=Fair, A=Average or Adequate, G=Good, E=Excellent) for the following topics, and provide explanations of the reasons for your ratings.

HIRING PROCESS: Advertising, tests, interviews, hiring decisions, notifications, etc.

Rating: _____

CAREER LADDERS: Job classifications, promotions within and across departments, etc.

Rating: _____

TRAINING: Funds and time for work-related seminars, workshops, conferences, etc.

Rating: _____

GRIEVANCES: Process, administration, communications, notifications, etc.

Rating: _____

DISCIPLINE: Process, administration, timeliness, fairness, communication, etc.

Rating: _____

Exhibit 5
ORGANIZATION AND OPERATIONS QUESTIONNAIRE
FOR PARKS & RECREATION MANAGEMENT STUDY

Name: _____ Title: _____
Division: _____ Section: _____
Location: _____ Phone: _____

The purpose of this questionnaire is to allow you to express your views about your responsibilities, workload, reporting relationships, operations, facilities and equipment, communications, and management practices. Please answer each question in terms of your organizational unit (division or section), even where the questionnaire says department!

This questionnaire, employee surveys, and your interview are your primary inputs to the Management Study. The questionnaire will be held in the strictest confidence by the consultants and shared only among the consulting team! For our report, we will compile issues and data across the organization in a way that will not compromise your position, job security, or working relationships.

Please complete the questionnaire personally and do not ask others for help in answering questions or developing data. Rely on your own knowledge and readily available data and materials. It should take no more than one hour to complete the questionnaire.

Answer each question to the best of your ability. Your answers should be complete, but need not be in great detail. If a question does not apply to you, mark it "Not Applicable" or "N/A." If you need more space or wish to provide added information, please insert this material immediately behind the page it relates to and number it the same as the question being answered.

If you have any questions, please contact Steve Egan, the Mercer Group's project manager, by phone at 770-425-1775 or by e-mail at segan@mercergroupinc.com.

By (_____), please seal your completed questionnaire in a large envelope and give it to (_____), who will send it to me unopened. Thank you for your cooperation and commitment to the project.

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PERFORMANCE EVALUATIONS: Process, criteria and standards, forms, frequency, meetings with supervisors to review the evaluation, connection to pay increases, etc.

Rating: _____

PAY: Compared to the City Jobs; compared to other governments and private employers in the area; rewards for performance, skills, and certifications; etc.

Rating: _____

BENEFITS: Compared to other governments and private companies in the area, mix of benefit programs, flexibility, administration, etc.

Rating: _____

LABOR RELATIONS: City-union relationship, tone of contract negotiations, timely renewal of contracts, adequacy of representation in dealings with the City, etc.

Rating: _____

MORALE: Current level of morale, relationships with supervisors and other employees, etc.

Rating: _____

I. YOUR WORK BACKGROUND

1. **Job History:** Please tell us about your education and training, prior work experience, and employment history with the organization, including when you first were hired. A personal resume can be provided to answer this question.

2. **Future Goals:** What are your future work and career goals?

3. **Special Skills:** What special skills, experience, or talents do you have that might be of value to the organization. For example, one of our clients needed someone to oversee training activities. We found a Maintenance Worker who coordinated training for the regional Boy Scouts Council and fit the job perfectly.

II. SWOT ASSESSMENT

- 4. Strengths: What are the major strengths and accomplishments of the organization? What are you proud of? What needs to be preserved and protected?
(a) _____
(b) _____
(c) _____
(d) _____
5. Weaknesses: What services, policies, procedures, or practices need to be improved?
(a) _____
(b) _____
(c) _____
(d) _____
6. Opportunities: What would you add, expand, or enhance if you were in charge?
(a) _____
(b) _____
(c) _____
(d) _____
7. Threats: What event or circumstance would prevent the organization from accomplishing its mission? What would make the wheels fall off?
(a) _____
(b) _____
(c) _____
(d) _____

IV. YOUR CURRENT JOB DUTIES

- 12. Job Description: We will collect a copy of your latest job description. How current and accurate is it? [100%] [75%] [50%] [25%] [0%] When was the last update? _____
Please list below any major responsibilities added (A), changed (C), or deleted (D) since the job description was last updated.
(a) _____ A/C/D _____
(b) _____ A/C/D _____
(c) _____ A/C/D _____
(d) _____ A/C/D _____
13. Job Duty Analysis: Please complete the Job Duty Analysis (Exhibit S-A that follows) to provide us a profile of how you allocate time to your duties, each duty's contribution to the mission, each duty's mandate, and units of service.
14. Backlog: Do you have a backlog of work on any of your activities? If so, list the activity and time (in hours, days, or months) to work down the backlog.
(a) _____
(b) _____
(c) _____
(d) _____
15. Transfers To: Would any of your duties be better performed by another staff member or by another unit, section, or division? If so, list them below and tell us who else should perform each one?
(a) _____ To Whom _____
(b) _____ To Whom _____
(c) _____ To Whom _____
16. Transfers From: Would you better perform duties now assigned to another staff member or by another unit, section, or division? If so, list them below and tell us who should transfer each one to you?
(a) _____ From Whom _____
(b) _____ From Whom _____
(c) _____ From Whom _____

APPENDIX I

III. YOUR VIEW OF THE ORGANIZATION'S FUTURE

- 8. Vision: What is the current Vision (i.e. the 10 or 20-year view of where the organization is going) for the department? Does the Vision need to be better defined or communicated?

9. Mission: What is the current Mission (i.e., it's purpose or reason for being) for the department? Do they need to be better defined or communicated?

10. Goals: What should the department's Goal's be over the next three years?
(a) _____
(b) _____
(c) _____
(d) _____
11. Objectives: What should your department's time-specific and quantifiable Objectives be in the next fiscal year to support achievement of the departmental goals?
(a) _____
(b) _____
(c) _____
(d) _____

Exhibit S-A
JOB DUTY ANALYSIS

The Job Duty Analysis provides data on the major activities that you perform on a daily, weekly, monthly, or annual basis. We will compile and analyze the data in order to identify work misplaced in the organization or assigned to the wrong person, excessive fragmentation of work among several people, low priority activities that could be reassigned or eliminated, and other issues.

Please complete the Job Duty Analysis Form on the next page as follows:

- > # and Short Description: From your job description, list each of your major job duties (most employees will have 6 to 10). If you have more than twelve major activities, continue on a second form. If a major duty is not shown on the job description, please list it on the form and note it is an addition to the list. Minor or infrequent duties should be grouped on one line ("Other Duties"). We expect that these Other Duties in total will represent a very small percentage (under 10%) of your total work hours.
> % Time: Estimate the percentage of time you spend on each duty when you are working. Ignore vacation, sick, and other non-productive time. The total of all duties should equal 100%!
> Priority: Rank each duty's priority to completing the mission of your unit:
(A) Highest priority in supporting the mission
(B) Lower priority in supporting the mission
(C) Lowest priority in supporting the mission
> Authority: Identify the authorization or source of each duty by the following codes:
(D) Department or division policy
(C) Citywide policy or requirement
(F/S) State or Federal law, regulation, or mandate
> Units: Provide annual units of work produced for each activity, if known (e.g. number of permits, applications processed, hearings, or transactions). Some activities will be ongoing throughout the year (e.g. management) and the unit of work will be "1."

WORK FOCUS

People: INTERNAL with a focus on managing and controlling operations and personnel (inputs and efficiency), or
EXTERNAL with a focus on customer relations and stakeholders (outcomes and effectiveness).

Work: You focus on DETAILS, such as workflow, procedures, systems, and operations, or on
Broad, MACRO issues, visions, goals, and the "Big Picture."

Resources: You focus on THINGS, equipment, materials, tools, computers, reports, or on
PEOPLE, relationships, communications.

Time: You focus on FAST events, issues, and problems, or on
FUTURE events, issues, and opportunities.

RELATIONSHIPS

Status: You are the BOSS (or the Expert), or
You share power by EMPOWERING and enabling your subordinates, co-workers, and/or customers.

Delegation: Authority and work effort resides CENTRALLY in you and/or key subordinates or co-workers, or
Authority and work effort is delegated BROADLY to supervisors, staff, and/or co-workers.

Decisions: A CLOSED process, involving yourself and key advisors, or
An OPEN process, with many employees and stakeholders involved.

Communications: INFORMAL, oral, multidirectional (up and down), nonhierarchical and flexible communication systems are used, or
FORMAL, written, one directional (downward), hierarchical, and inflexible systems are used.

Exhibit 7

PERFORMANCE INDICATORS IN PUBLIC SERVICES

The following performance indicators are applied in The Mercer Group's Management and Organizational Studies of Public Works, Public Services, and Utility agencies. The indicators supplement Mercer's 30 Management Issues for Organizational Improvement, which are used to assess performance issues related to management functions, such as governance, planning, service delivery structure, management, operations, and resource management.

Performance indicators may relate to inputs, outputs, and outcomes, and, where possible, present a measurable standard (absolute value or range of values). These model indicators and standards are tailored to each consulting client during a Mercer Management Study.

Administration

1. Citizen Satisfaction with Public Services at a high level from an annual survey (likely a Village-wide exercise such as the National Citizen Survey).
2. Operating and Capital budgets delivered on time and fully meet Village standards.
3. Monthly and Annual Reports delivered on time and fully meet Village standards.
4. Department has developed and maintains a process for *Managing the Numbers* (utilization of people, equipment, and supplies and cost of service for major activities).
5. Public Services website up-to-date per Village standards.
6. Event and emergency notification system active (web, texts, emails).

Engineering

1. GIS in place to identify and map all assets.
2. Cost of architectural and engineering services as a percentage of each capital project. (Goal = <6%)
3. Time required to process engineering permits and reviews. (Goals = Immediately to 5 work days for minor permits and less than 3 weeks for major permits/reviews)
4. On time with documents supporting projects bid (timing set by Purchasing).
5. Online permit application and tracking available on the website (same with Community Development Department).

III. Management Philosophy Worksheet

PERSONALITY	1	2	3	4	5
Type	Mostly Introvert	Slight Introvert	Middle of the Road	Slight Extrovert	Mostly Extrovert
Risk-taking	No Risks	Few Risks	Middle of the Road	More Risks	Lots of Risks
Initiative	Very Reactive	Slightly Reactive	Middle of the Road	Slightly Proactive	Very Proactive
Solutions	Mostly Feeling	Slightly Feeling	Feeling & Analysis	Slightly Analysis	Mostly Analysis
WORK FOCUS	1	2	3	4	5
People	Very Internal	Slightly Internal	Internal & External	Slightly External	Very External
Work	Mostly Details	Slightly Details	Details & Macro	Slightly Macro	Mostly Macro
Resources	Mostly Things	Slightly Things	Things & People	Slightly People	Mostly People
Time	All in the Past	Past to Today	Past to Week +	Past to Month +	Past to Year +
RELATIONSHIPS	1	2	3	4	5
Status	Mostly A Boss	Slightly A Boss	Middle of the Road	Slightly Empower	Mostly Empower
Delegation	Very Central	Slightly Central	Middle of the Road	Slightly Broad	Mostly Broad
Decisions	Mostly Closed	Slightly Closed	Middle of the Road	Slightly Open	Mostly Open
Communications	Very Formal	Slightly Formal	Middle of the Road	Slight Informal	Very Informal

Facilities

1. Condition rating completed and updated annually for each building per a regular inspection program with more detailed inspection conducted every 3-5 years by consulting A&E firm.
2. Preventative Maintenance schedule in place and adhered to.
3. Time required to make repairs (Goals = 1 to 3 days for minor repairs and 2 weeks for major repairs, unless bid out).
4. HVAC systems work basically all the time.
5. Cleaning/Janitorial service daily based on detailed standards.
6. Internal and external security system in place, with controlled access, lighting, and cameras.

Fleet

1. Equipment Replacement Plan in place and adhered to (with minor modifications based on annual reviews of equipment condition by Fleet Operations staff).
2. Preventative Maintenance schedule in place and adhered to.
3. 95+% of vehicles and equipment available for use on a daily basis with some equipment (e.g., garbage trucks) available to meet scheduled services.
4. Adequate backups to meet scheduled services.
5. Time required to make repairs (Goals = Immediate for very minor repairs, 1 day for routine services like an oil change, 1 to 3 days for minor repairs, and 2 weeks for major repairs, unless bid out).
6. Major repairs assessed for in-house vs. contract delivery based on in-house capabilities, cost, and garage work demand.
7. Fleet operated as a self-sufficient Internal Service Fund.
8. Mechanic billing rates based on full cost of service, not just salaries and benefits.
9. Parts inventory turns over 4 to 6 times per year.
10. Obsolete parts reviewed during annual inventory and culled out.
11. Parts markup under 15% of cost of the part.

Forestry

1. Tree inventory completed and up-to-date.
2. Pruning program in place and up-to-date.
3. Emergency pruning or tree removal tasks completed in 4 to 24 hours of notice, if an emergency situation, and 48 hours if not.

Lights and Signals

1. Asset inventory completed and up-to-date.
2. Asset management system in place with routine maintenance program.
3. Street light outages repaired within 36 hours.
4. Traffic signal problems repaired within 4 to 8 hours.

Parks Maintenance

1. Parks asset inventory completed and up-to-date.
2. Asset Condition Assessment conducted annually, with a focus on playgrounds, bleachers, and equipment that people regularly use.
3. Parks maintenance plan in place and implemented, including mowing, pruning, bathrooms, picnic pavilions, and recreation centers.

Streets

1. Streets asset inventory completed and up-to-date to include streets, curbs and gutters, swales (if no curbs), sidewalks, etc.
2. Street Condition Assessment conducted on a regular basis (Goal = Annual to three-year cycle).
3. Street Condition standard developed and approved, such as an average 80 rating.
4. Capital Improvements program in place and funded to meet Street Condition Standard and Assessment. Key Indicator is number of miles of streets rebuilt annually compared to the total miles of streets (Goal = About 5% per year or 20-year cycle for residential streets and a bit higher/longer for arterials/collectors).
5. Street repairs completed in a timely manner (varies from 8 hours to inclusion in the next CIP program).

Sewers

1. Sewer operations meet state and federal water quality rules and regulations.
2. Sewer operates as a self-sufficient Enterprise Fund.
3. Sewer asset inventory completed and up-to-date to include sanitary and storm sewers, grates, manholes, lift stations, drainage structures, etc.
4. Sewer Condition Assessment via televising and inspection is completed on a regular basis.
5. Preventative Maintenance Plan defined and fully implemented.
6. Grease-Oil mitigation program in place.
7. Sewer cleaning conducting for at least 1/3 of the system annually.
8. Sewer repairs completed in a timely manner (varies from 8 hours to inclusion in next CIP program).

Transit

1. On time performance.
2. Number of riders and passenger miles annually.
3. Bus Condition assessed daily and repairs made quickly.
4. Bus stops, if used, are cleaned up daily.
5. Rider satisfaction from regular sampling and annual survey.

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Water Plant

1. Plant meets state and federal water quality standards, rules, and regulations.
2. Asset inventory completed and up-to-date.
3. Condition Assessment conducted on a regular basis (Goals = In-house inspection annually and an in-depth analysis by consulting engineer every 3-5 years).
4. Preventative Maintenance Plan defined and fully implemented.
5. Operations Manual developed and updated every year, with staff fully trained.
6. Water operates as a self-sufficient Enterprise Fund.
7. Rates based on full cost of service from rate study every 2-3 years.

Water Distribution

1. Distribution system meets state and federal water quality rules and regulations.
2. Asset inventory completed and up-to-date.
3. Condition Assessment conducted on a regular basis.
4. Preventative Maintenance Plan defined and fully implemented, including valve exercise and hydrant flushing programs over no more than a two-year cycle.
5. Operations Manual developed and updated every year, with staff fully trained.
6. Main breaks are repaired within 8 hours of notice (12" and under) and larger mains within 24 hours.
7. Dead-end mains flushed as needed to maintain water quality in houses and businesses.
8. Hydrants are inspected annually, painted, and repaired as needed (Goal = No more than a handful of hydrants out-of-service at any given time).
9. Water pressure meets water supply and fire flow pressure standards.
10. Water operates as a self-sufficient Enterprise Fund.
11. Rates based on full cost of service from rate study every 2-3 years.

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Draft Management Study of the Mountain Brook Parks & Recreation Department (6/4/2014)

Exhibit 8
THE MERCER GROUP'S
DECISION CRITERIA FOR
COLLABORATION AND CONTRACTING

Our criteria for collaboration and contracting decision is based on our thirty years of work and consulting experience in the public sector; research including ideas in books like "Reinventing Government;" and the lessons learned from assessment of collaboration and contracting opportunities for our consulting clients.

Criteria from "Reinventing Government"

In "Reinventing Government," Osborn and Gabeber identify the following criteria to examine the strengths and weaknesses of specific collaboration and contracting opportunities:

- > Service Specificity: How specifically can a service be defined so governments (the providers) can tell producers what it wants?
- > Availability of Producers: Are there enough qualified producers to ensure competition?
- > Efficiency and Effectiveness: Can producers provide the service efficiently and effectively?
- > Scale of the Service: How large an organization is needed to produce the service?
- > Relating Benefits and Costs: To what degree do users pay directly for the benefits?
- > Responsiveness to Customers: Is the provider customer friendly and responsive?
- > Economic Equity: Can the service be provided equitably to all customers?
- > Equity for Minorities: Will minorities receive adequate benefits from the service or product?
- > Responsiveness to Government Direction: Will the producer adequately follow the government policy and specifications in delivering the service or product?
- > Size of the Government: Is the providing government big enough (and sophisticated enough) to enable it to provide effective oversight of another producer?

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Draft Management Study of the Mountain Brook Parks & Recreation Department (6/4/2014)

Mercer Group's Decision Criteria

Based on our experience and supporting research, the Mercer Group has developed a set of sixteen decision criteria to evaluate the feasibility of cooperative approaches to the delivery of services. Some of these factors can be measured and quantified, while others must be assessed on more intangible factors.

- > Governance:
 - Legal Authority: Do the governments have the legal authority to collaborate?
 - Policy Compliance: Does the approach to collaboration meet policy and regulatory requirements of each community?
 - Political Culture: Is the collaborative approach compatible with the political cultures, visions, and values of each community?
 - Community Support: Do citizens, the business community, major stakeholders, and elected officials support collaboration in general and the specific proposal for service collaboration that is on the table?
- > Management:
 - Management Culture: Are the government's managers and department heads ready for a collaborative approach?
 - Management Skills: Do these managers have the skills and experience to effectively deliver the services under a collaborative model.
 - Administration: Are policies, procedures, systems, and controls in place, or easily developable, to administer collaborative approaches, including communication and financial systems?
 - Are financial, human resources, and other administrative policies, systems, and controls compatible, or easily made compatible, including pay plans and union agreements?
 - Performance Measurement: Are performance measures, output and outcome data collection processes, and reporting processes in place to establish, track, and report performance?

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➤ **Assets and Resources:**

- **Facilities and Infrastructure:** Are facilities and other infrastructure adequate to support the collaborative model? If not, can they be acquired at a reasonable cost that does not undermine the financial model?
- **Technology:** Are equipment and technology adequate to support the collaborative model? If not, can they be acquired at a reasonable cost that does not undermine the financial model?
- **Fiscal Capacity:** Do the governments have the fiscal capacity to implement the collaborative model? This question includes the adequacy and reasonableness of tax revenues, user fees and charges, assessments, and contract fees to support the collaborative model.
- **People:** Are the number and quality of service-providing staff adequate to implement the collaborative model? Are supervisors adequately skilled to manage assigned staff? If not, can they be acquired and/or trained at a reasonable cost that does not upset the financial model?

➤ **Services:**

- **Service Level Expectations:** Will the quantity of services produced match customer and stakeholder expectations (not too low in particular)?
- **Service Quality Expectations:** Will the quality of services produced match customer and stakeholder expectations (not too low in particular)?
- **Operational Effectiveness:** Can operational challenges be resolved to justify implementing the collaborative approach? These challenges include different organizational and operational models; policies, procedures, and techniques; physical locations; organization and staffing plans; job responsibilities and job descriptions; union agreements; and equipment, markings, and gear specifications.
- **Fiscal Effectiveness:** Does the collaborative approach make financial and economic sense for each government in terms of immediate cost savings, future cost avoidance, potential gains in efficiency, affordability of apportioned shares or contract fees, and potential reductions in tax burdens?

Table 1

Pros and Cons for Consolidation of All Public Safety Agencies

MAJOR ENABLERS/BENEFITS	MAJOR INHIBITORS/DRAWBACKS
Creation of a joint governing board	Some loss of political control and oversight, but mitigated by a joint Public Safety Committee serving as a governing board
Some cost savings are possible with fewer senior management staff and possibly patrol officers and firefighters (more of a financial benefit to the City)	Differences in current Fire and EMS models (department structure and full-time vs. paid-on-call firefighters)
Unified services to cover both City and Town to ensure crime migration is dealt with effectively	May lack an adequate Public Safety HQ facility unless some positions can be based at the proposed Regional Training Center or other City/Town facilities
Better coordination of services in emergencies and disasters	Potential difficulty in determining cost allocation methods (not a major problem)
Better coordination of Police, Fire, and EMS personnel on a daily basis	Ambulance service revenue sharing or splitting may be difficult to accomplish, particularly with fee revenues booked to the City's General Fund and per capita fees to the Town's General Fund. But costs will be avoided as personnel and equipment shift to a unified department
Higher levels of investigative and, possibly, patrol resources	Conversion of union agreements in Police and Fire/EMS (likely merged)
More opportunities for advancement and specialization, particularly for Town officers	Conversion to common specifications for equipment, vehicles, markings, tools, and gear
Less migration of officers to other jurisdictions due to pay and shift limitations	
Possibly fewer building and less equipment to manage	

APPENDIX 1

Application of the Decision Criteria

Preliminary research and fact finding is required to identify general and opportunity-specific factors that influence application of the Decision Criteria and, therefore, the feasibility of collaboration or contracting:

- **Strengths, Weaknesses, Opportunities, and Threats:** A SWOT Assessment provides a general understanding of the collaboration and contracting opportunity, and the degree to which organizational and operational improvements are needed.
- **Organizational Culture and Management Philosophy:** A cultural analysis indicates how well the collaborating/contracting organizations "fit" together in terms of culture and management philosophy.
- **Enablers and Inhibitors:** These factors indicate the feasibility of collaboration and contracting in terms of governance, management, service delivery, and administrative support issues.

The exhibits that follow present Decision Criteria Evaluation for a sample consolidation of all Public Safety services of a City and a Town:

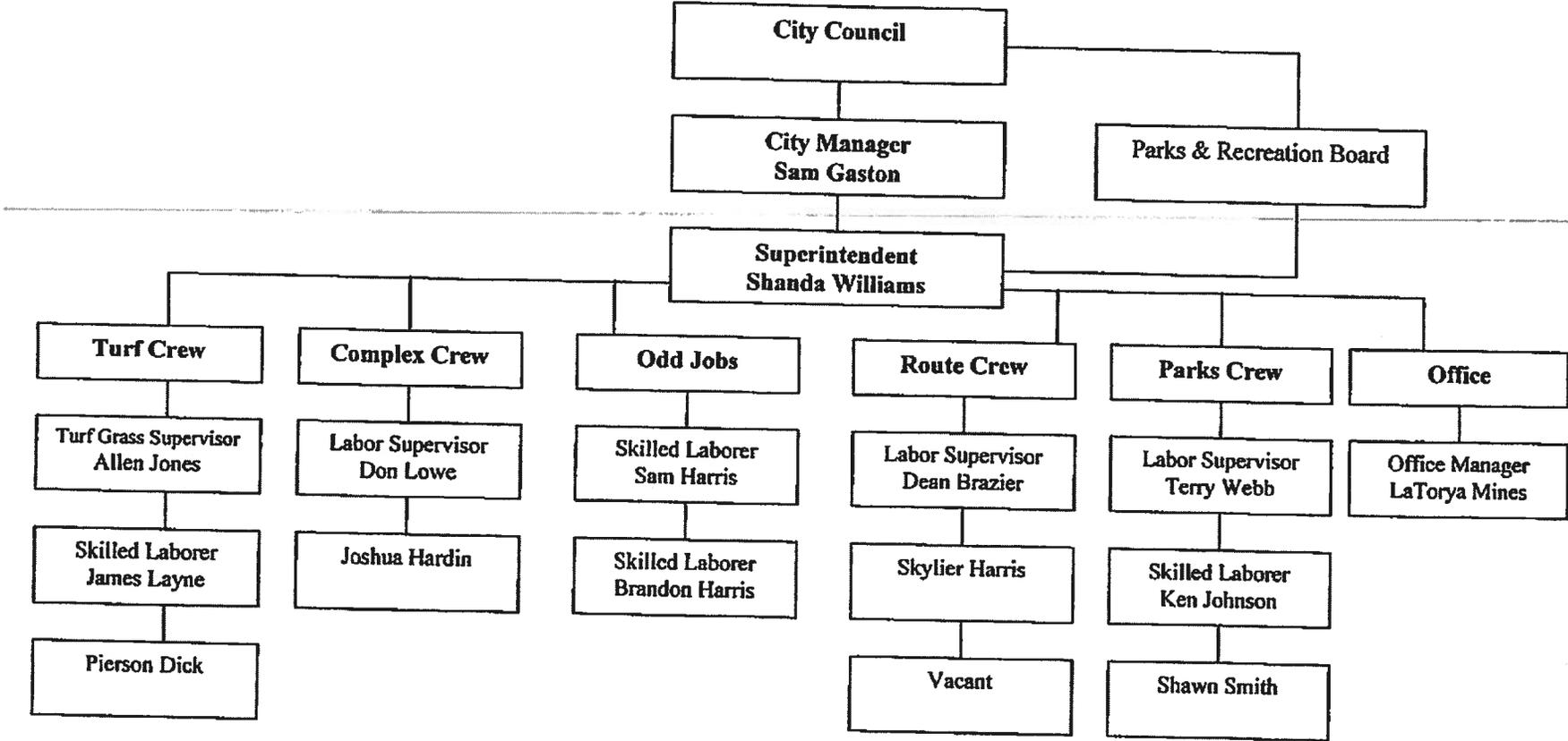
- **Exhibit 1** compiles the pros and cons based on Enablers and Inhibitors (bolded items are most important).
- **Exhibit 2** presenting ratings for each of the 16 decision criteria, comments, and an overall feasibility rating. Note that some criteria are rated 4, between 5=Possible and 3=Possible, or 2, between 3=Possible and 1=Unlikely.

Table 2

Rating of Full Public Safety Consolidation

GOVERNANCE	RATING	COMMENTS
Legal Authority	5 – Favorable	
Policy Compliance	3 – Possible	
Political Culture	2 – Possible to Unlikely	Uncertain political support
Community Support	2 – Possible to Unlikely	Probable town opposition
MANAGEMENT		
Management Culture	3 – Possible	
Management Skills	4 – Favorable to Possible	Need to develop
Administration	3 – Possible	
Performance Measures	5 – Favorable	
RESOURCES		
Facilities/Infrastructure	3 – Possible	
Technology	3 – Possible	
Fiscal Capacity	5 – Favorable	
People	4 – Favorable to Possible	Need development
SERVICES		
Service Level Expectations	5 – Favorable	
Service Quality Expectation	5 – Favorable	
Operational Effectiveness	4 – Favorable to Possible	Merge practices
Fiscal Effectiveness	4 – Favorable to Possible	If savings realized
CATEGORY RECAP		
Governance	12	
Management	15	
Resources	15	
Services	18	
Total Score:	60	
COMMENTS		Political Culture and Community Support rated low (2) as this option may not be supported by elected officials and citizens.
		Management Skills and People scores likely would rise to 5 if a Public Safety Director is hired.
		Management Skills and Operational/Fiscal Effectiveness rated 4 as the City and Town don't have experience with this model.
FEASIBILITY RATING		GOOD

City of Mountain Brook Parks & Recreation Department



**MINUTES OF THE REGULAR MEETING OF THE
CITY COUNCIL OF THE
CITY OF MOUNTAIN BROOK, ALABAMA
AUGUST 25, 2014**

The City Council of the City of Mountain Brook, Alabama met in public session in the City Hall Council Chambers (Room A108) at 7:00 p.m. on Monday, the 25th day of August, 2014. The Council President Pro Tempore called the meeting to order and the roll was called with the following results:

Present: Amy G. Carter, Council President Pro Tempore
William S. Pritchard, III
Jesse S. Vogtle, Jr.
Jack D. Carl
Lawrence T. Oden, Mayor

Absent: Virginia C. Smith, Council President

Also present were City Attorney Whit Colvin, City Manager Sam Gaston, and City Clerk Steven Boone.

The City Council President Pro Tempore stated that a quorum was present and that the meeting was open for the transaction of business.

1. CONSENT AGENDA

Council President Pro Tempore Carter announced that the following matters will be considered at one time on the consent agenda provided no one in attendance objects:

Approval of the minutes of the August 11, 2014 meeting of the City Council.

2014-101	Proclamation: Constitution Week	Exhibit 1
2014-102	Proclamation: Gynecological Cancer Awareness Week	Exhibit 2
2014-103 Motion	Authorize the City Manager to bind the City's fiscal 2015 property and liability insurance policies with One Beacon Insurance (no change in deductibles from the expiring policy) effective September 1, 2014 as recommended by the Finance Committee at its work session conducted on August 14, 2014	Appendix 1
2014-104	Authorize the execution of two service agreements between the City and New World Systems with respect to 1) Aegis MSP and Mobile server migration and 2) NCIC parsing	Exhibit 3 Appendix 2
2014-105	Authorize the execution of a right-of-way encroachment agreement between the City and Ilene and Sanford Axelroth with respect to the property located at 2235 Peacock Lane	Exhibit 4 Appendix 3
2014-106	Authorize the lump sum pension benefit payment to persons who retired on or before January 1, 1995 (commonly referred to as "CIGNA retirees") under the same terms and conditions specified in Section 2 of Act 429 of the Regular Session of the 2014 Alabama Legislature	Exhibit 5

2014-107	Elect to come under the provisions of Section 2 of Act 429 of the Regular Session of the 2014 Alabama Legislature with respect to the payment of a one-time lump sum pension benefit payment for the retirees of the City of Mountain Brook (MTB 2460)	Exhibit 6 Appendix 4
2014-108	Elect to come under the provisions of Section 2 of Act 429 of the Regular Session of the 2014 Alabama Legislature with respect to the payment of a one-time lump sum pension benefit payment for the retirees of the Mountain Brook Park and Recreation Board (MBP 4792)	Exhibit 7 Appendix 5
2014-109	Elect to come under the provisions of Section 2 of Act 429 of the Regular Session of the 2014 Alabama Legislature with respect to the payment of a one-time lump sum pension benefit payment for the retirees of the Mountain Brook Library Board (MBL 4791)	Exhibit 8 Appendix 6

Thereupon, the foregoing minutes, motion, and resolutions were introduced by Council President Pro Tempore Carter and their immediate adoption was moved by Council member Pritchard. The minutes and resolutions were then considered by the City Council. Council member Vogtle seconded the motion to adopt the foregoing minutes, motion, and resolutions. Then, upon the question being put and the roll called, the vote was recorded as follows:

Ayes: Amy G. Carter, Council President Pro Tempore
William S. Pritchard, III
Jesse S. Vogtle, Jr.
Jack D. Carl
Lawrence T. Oden, Mayor

Nays: None

Council President Pro Tempore Carter thereupon declared that said minutes, Motion No. 2014-103, and Resolution Nos. 2014-101, 102, and 104 through 109 are adopted by a vote of 5—0.

2. ANNOUNCEMENT REGARDING THE NEXT REGULAR MEETING OF THE CITY COUNCIL

Council President Pro Tempore Carter announced that the next meeting of the Mountain Brook City Council will be held on Monday, September 8, 2014 at 7 p.m. in the Council Chamber of City Hall located at 56 Church Street, Mountain Brook, AL 35213. Please visit the City's web site (www.mtnbrook.org) for more information.

3. EXECUTIVE SESSION AND ADJOURNMENT

There being no further business to come before the City Council, it was moved by Council member Pritchard that the City Council convene in executive session to discuss a matter involving a real estate transaction. The motion was seconded by Council member Vogtle. The City Attorney certified that the subject matter of the executive session is allowed pursuant to the Open Meetings Act. Then, upon the question being put and the roll called, the vote was recorded as follows:

Ayes: Amy G. Carter, Council President Pro Tempore
William S. Pritchard, III
Jesse S. Vogtle, Jr.
Jack D. Carl
Lawrence T. Oden, Mayor

Nays: None

Council President Pro Tempore Carter declared that the motion carried by a vote of 5-0 and then asked that the members of the audience be excused. She also announced that the City Council shall not reconvene upon conclusion of the executive session.



Steven Boone, City Clerk

EXHIBIT 1

PROCLAMATION NO. 2014-101

WHEREAS, The Constitution of the United States of America, the guardian of our liberties, embodies the principles of limited government in a Republic dedicated to rule by law; and

WHEREAS, September 17, 2013, marks the two hundred twenty-seventh anniversary of the framing of the Constitution of the United States of America by the Constitutional Convention; and

WHEREAS, It is fitting and proper to accord official recognition to this magnificent document and its memorable anniversary, and to the patriotic celebration which will commemorate it; and

WHEREAS, Public Law 915 guarantees the issuing of a proclamation each year by the President of the United States of America designating September 17th through 23rd as Constitution Week;

NOW, THEREFORE, I, Lawrence T. Oden, by virtue of the authority vested in me as Mayor of the City of Mountain Brook, do hereby proclaim the week of September 17th through 23rd as

CONSTITUTION WEEK

and urge all residents to study the Constitution, and reflect on the privilege of being an American with all the rights and responsibilities which that privilege involves.

EXHIBIT 2

PROCLAMATION NO. 2014-102

WHEREAS, gynecologic cancer is the fourth largest cancer killer of women in the United States and more than 80,000 will be diagnosed this year alone; and

WHEREAS, the good health and well-being of women in our state are enhanced as a direct result of efforts to spread awareness about gynecologic cancers and their symptoms and treatments; and

WHEREAS, among the health concerns facing today's society are cancers unique to women that claim the lives of too many mothers, daughters, sisters and other loved ones— some of which have few signs or symptoms, and which are often difficult to detect; and

WHEREAS, women's reproductive cancers vary widely, ranging from preventable, to easily detected and treated stages, to the difficult-to-diagnose stage; and

WHEREAS, it is critical for women, physicians and all healthcare providers to recognize the risk factors and symptoms of gynecologic cancers and to remember the importance of early detection in preventing and treating this disease; and

WHEREAS, continued progress in the battle against gynecologic cancer requires vigilant public awareness and support for effective healthcare programs, services, scientific research and education; and to this end, all educators, service providers, researchers and advocacy groups are urged to work together to develop ways to inform more women about gynecologic cancer and to ensure that all women have access to appropriate cancer screening services; and

WHEREAS, it is fitting to recognize the worthy goals of this observance and to promote efforts to reduce the incidence of gynecologic cancer among our loved ones, and it is also crucial that all women take an active role in learning the symptoms and risk factors associated with all forms of cancer, developing healthy habits, and undergoing regular medical examinations so that any occurrence of this disease may be detected in its early and treatable stages; and

WHEREAS, women must be well-informed about early signs and symptoms in order to benefit from advances made in the treatment of these cancers; and

WHEREAS, it is incumbent upon the residents of the City of Mountain Brook, Alabama to work together as concerned people to increase research in understanding the causes, finding effective screening and prevention strategies, and developing improved therapies for gynecologic cancers; and

WHEREAS, groundbreaking research into the causes, detection and treatment of gynecologic cancers is currently being performed in medical centers located in Alabama; and

WHEREAS, the State Capitol will be lit in teal, the designated awareness color for gynecologic cancers, on Tuesday, September 2, 2014:

NOW, THEREFORE, I, Lawrence T. Oden, Mayor of the City of Mountain Brook, Alabama, do hereby proclaim September 2, 2014 as

GYNECOLOGIC CANCER AWARENESS DAY

in the City, and encourage all residents to reflect upon the memory of those lost to these diseases, the bravery of those currently battling these diagnoses, the need for increased awareness, screening and research so that all women might be spared from them in the future, and encourage all residents to work together to raise awareness of gynecologic cancers, and do commend this observance to all our residents.

EXHIBIT 3

RESOLUTION NO. 2014-104

BE IT RESOLVED by the City Council of the City of Mountain Brook, Alabama, that the City Council hereby authorizes the execution of the following agreements between the City and New World Systems:

1. Exhibit A – Aegis MSP and Mobile server migration services
2. Exhibit B – NCIC parsing services

APPENDIX 2

EXHIBIT 4

RESOLUTION NO. 2014-105

BE IT RESOLVED by the City Council of the City of Mountain Brook, Alabama, that the City Council hereby authorizes the execution of an agreement between the City and Property Owners ILENE L. AXELROTH and SANFORD B. AXELROTH with respect to a Public Utility easement encroachment for

construction and maintenance of a retaining and privacy wall along, over and across a public utility easement which runs along the rear of the Owners' Property at 3525 Mill Springs Road, Mountain Brook, AL.

APPENDIX 3

EXHIBIT 5

RESOLUTION NO. 2014-106

BE IT RESOLVED by the City Council of the City of Mountain Brook, Alabama that the City Council hereby authorizes the lump sum payment to persons who retired from the City of Mountain Brook on or before January 1, 1995 (commonly referred to as "CIGNA retirees") under the same terms and conditions as specified in Section 2 of Act 429 of the Regular Session of the 2014 Alabama Legislature.

EXHIBIT 6

RESOLUTION NO. 2014-107

BE IT RESOLVED by the City Council of the City of Mountain Brook, Alabama that the City Council hereby elects to come under the provisions of Section 2 of Act 429 of the Regular Session of the 2014 Alabama Legislature.

BE IT FURTHER RESOLVED by the City Council of the City of Mountain Brook, Alabama that the City Council of the City of Mountain Brook, Alabama hereby agrees to provide all funds necessary to the Employees' Retirement Systems (ERS) of Alabama to cover the cost of the one-time lump sum payment as provided for by said Act for those eligible employees retired from the City of Mountain Brook (MTB 2460) with the aforementioned lump sum payment to be made by the ERS on or about October 15, 2014.

APPENDIX 4

EXHIBIT 7

RESOLUTION NO. 2014-108

BE IT RESOLVED by the City Council of the City of Mountain Brook, Alabama that the City Council hereby elects to come under the provisions of Section 2 of Act 429 of the Regular Session of the 2014 Alabama Legislature with respect to retirees of Mountain Brook Park and Recreation Board (MBP 4792).

BE IT FURTHER RESOLVED by the City Council of the City of Mountain Brook, Alabama that the City Council hereby agrees to provide all funds necessary to the Employees' Retirement Systems (ERS) of Alabama to cover the cost of the one-time lump sum payment as provided for by said Act for those eligible employees retired from the Mountain Brook Park and Recreation Board (MBP 4792) with the aforementioned lump sum payment to be made by the ERS on or about October 15, 2014.

APPENDIX 5

EXHIBIT 8

RESOLUTION NO. 2014-109

BE IT RESOLVED by the City Council of the City of Mountain Brook, Alabama that the City Council hereby elects to come under the provisions of Section 2 of Act 429 of the Regular Session of the 2014 Alabama Legislature with respect to retirees of Mountain Brook Library Board (MBL 4791).

BE IT FURTHER RESOLVED by the City Council of the City of Mountain Brook, Alabama that the City Council hereby agrees to provide all funds necessary to the Employees' Retirement Systems (ERS) of Alabama to cover the cost of the one-time lump sum payment as provided for by said Act for those eligible employees retired from the Mountain Brook Library Board (MBL 4791) with the aforementioned lump sum payment to be made by the ERS on or about October 15, 2014.

APPENDIX 6

**Insurance Renewal
City of Mountain Brook**



	One Beacon Expired 2013	One Beacon Expiring Policy 2014	One Beacon Renewal 2015	One Beacon Increased Deductibles	One Beacon Increased Deductibles
Premium	\$ 259,802	\$ 299,507	\$ 264,465	\$ 243,007	\$ 238,007
		15%	-12%	-19%	-21%
Deductibles					
General Liability	\$ 5,000	\$ 5,000	\$ 5,000	\$ 10,000	\$ 10,000
Property	\$ 1,000	\$ 1,000	\$ 1,000	\$ 25,000	\$ 25,000
Law Enforcement	\$ 10,000	\$ 10,000	\$ 10,000	\$ 25,000	\$ 25,000
Auto Liability	\$ 0	\$ 0	\$ 0	\$ 0	\$ 5,000
Auto Property	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,000

	2012	2013	2014
Losses	\$ 37,299	\$ 12,696	\$ 12,550
Auto (property/liab)	\$ 14,639	\$ 12,696	\$ 12,550
General Liability	\$ 20,000	\$ 0	\$ 0
Property	\$ 2,660	\$ 0	\$ 0
Law Enforcement	\$ 0	\$ 0	\$ 0

APPENDIX I

* Finance Committee recommendation

2014-103



July 2, 2014

ADDITIONAL SERVICES AGREEMENT

Chief Ted Cook
Mountain Brook Police Department
100 Tibbett Street
Mountain Brook, AL 35223

Dear Chief Cook:

New World Systems is pleased to provide additional services for an Aegis MSP and Mobile server migration.

The attached form (Exhibit B) is to be reviewed and approved by you and/or your authorized representative. It describes the additional services you have requested along with the related fees.

Other than for the purposes of internal review, we ask that you treat our fees as confidential information. This is due to the competitive nature of our business.

The General Terms and Conditions from our original License Agreement are incorporated and continue to apply. Any taxes or fees imposed from the course of this Agreement are the responsibility of the Customer.

We thank you for your continued business with New World Systems. We look forward to working on this project with you.

ACKNOWLEDGED AND AGREED TO BY:

NEW WORLD SYSTEMS CORPORATION (New World)
MOUNTAIN BROOK POLICE DEPT. AL (Customer)
By: Larry D. Leinweber, President
By: [Signature] Mayor
Date: 8/25/2014

Each individual signing above represents that (s)he has the requisite authority to execute this Agreement on behalf of the organization for which (s)he represents and that all the necessary formalities have been met.

The "Effective Date" of this Agreement is the latter of the two dates in the above signature block.

PRICING IS VALID THROUGH SEPTEMBER 30, 2014.

Corporate: 888 West Big Beaver Road • Suite 600 • Troy • Michigan 48064-4749 • 248-269-1000 • www.newworldsystems.com



June 26, 2014

ADDITIONAL SERVICES AGREEMENT

Captain Greg Hagood
Mountain Brook Police Department
100 Tibbett Street
Mountain Brook, AL 35223

Dear Captain Hagood:

New World Systems is pleased to provide additional services for NCIC Parsing.

The attached form (Exhibit B) is to be reviewed and approved by you and/or your authorized representative. It describes the additional services you have requested along with the related fees.

Other than for the purposes of internal review, we ask that you treat our fees as confidential information. This is due to the competitive nature of our business.

The General Terms and Conditions from our original License Agreement are incorporated and continue to apply. Any taxes or fees imposed from the course of this Agreement are the responsibility of the Customer.

We thank you for your continued business with New World Systems. We look forward to working on this project with you.

ACKNOWLEDGED AND AGREED TO BY:

NEW WORLD SYSTEMS CORPORATION (New World)
MOUNTAIN BROOK POLICE DEPT. AL (Customer)
By: Larry D. Leinweber, President
By: [Signature] Mayor
Date: 8/25/2014

Each individual signing above represents that (s)he has the requisite authority to execute this Agreement on behalf of the organization for which (s)he represents and that all the necessary formalities have been met.

The "Effective Date" of this Agreement is the latter of the two dates in the above signature block.

PRICING IS VALID THROUGH SEPTEMBER 26, 2014.

Corporate: 888 West Big Beaver Road • Suite 600 • Troy • Michigan 48064-4749 • 248-269-1000 • www.newworldsystems.com

EXHIBIT A

EXHIBIT B

APPENDIX 2

EXHIBIT B
ADDITIONAL SUPPORT SERVICES AND FEES

1. Service Fees and Travel Costs

The fixed fee for an Aegis MSP and Mobile server migration will be \$16,500. (Plus all actual and reasonable travel expenses and time incurred by New World divided proportionately between all New World customers visited on a single trip.)

Services to include:

- a) Confirm operating system installation and hardware components are configured properly.
b) Install SQL Server 2008 R2 application.
c) Install Aegis server components.
d) Install and configuration of ESRI components.
e) Migrate GIS/Mapping data components.
f) Migrate database components.
g) Configure Aegis server to operate with database components.
h) Build test Aegis MSP server.
i) Build production Mobile Management Server.
j) Build test Mobile Management Server.
k) Go-Live Support for transition to new production server.

Additional support services provided by New World outside the scope of this Agreement will be provided at the Customer's daily rate in effect at that time, currently \$1,200 per day.

2. Payments for Services and Travel Costs

Support Services will be billed as follows:

Table with 2 columns: Description, Amount. Row 1: Amount invoiced upon the Effective Date (100%) \$16,500. Row 2: TOTAL DUE \$16,500.

All travel costs including time will be billed weekly for the previous calendar week. Any taxes or fees imposed from the course of this Agreement are the responsibility of the Customer and Customer agrees to remit when imposed.

ALL PAYMENTS ARE DUE WITHIN FIFTEEN (15) DAYS FROM RECEIPT OF INVOICE.

EXHIBIT B
ADDITIONAL SUPPORT SERVICES AND FEES

1. Support Services

Up to 5 days have been allocated to provide NCIC Parsing. Actual usage may be higher or lower based on Customer's requirements and use of these support services.

Support services are typically performed at Customer's premises but may be provided at New World national headquarters in Troy, Michigan. Customer agrees to reimburse New World for support trips canceled by Customer less than ten (10) days before the scheduled start date to cover New World's out of pocket costs and lost revenues.

2. Support Service Fees

The days cited above will be provided at the rate of \$1,200 per day. Any additional support services provided by New World outside the scope of this Agreement will be provided as an additional cost at the Customer's daily rate in effect at that time.

Based on the days listed above, the support service cost is \$6,000. (Plus all actual and reasonable travel expenses and time incurred by New World divided proportionately between all New World customers visited on a single trip.)

3. Payments for Services and Travel Costs

Support Services will be billed as follows:

Table with 2 columns: Description, Amount. Row 1: Amount invoiced upon the Effective Date (100%) \$6,000. Row 2: TOTAL DUE \$6,000.

All travel costs including time will be billed weekly for the previous calendar week. Any taxes or fees imposed from the course of this Agreement are the responsibility of the Customer and Customer agrees to remit when imposed.

EXHIBIT A

EXHIBIT B

ARSEA/APEAL 800.844.7732

Local Government Contacts

Agency	Contact Info	Personnel Contact	Next Meeting
City of Vestavia Hills	513 Montgomery Highway Vestavia Hills, AL 35216 Phone: 205-978-0100 www.vhvil.org	Alberto Zangola, Jr. Scott Almon Jim Sharp Gene Rouse John Trechy	July 28 - 5 pm Council meets the second and fourth Monday at 5 pm
City of Homewood	18th Street, Suite 2 Homewood, AL 35209 Phone: 205-337-6107 www.homewoodal.org	Scott Medrayer Bruce Lumbaugh Michael S. Hallman Brett Thomas Fred Hawkins Vance Moody Patrick MacClusky Walter Jones Jennifer Champ Heather Reid Peter Wright	August 4 - 6 pm Council meets the first Tuesday of the month at 6 pm
City of Mountain Brook	PO Box 130009 Mountain Brook, AL 35213 Phone: 205-802-1800 www.mtnbrook.org	Lawrence Terry Odien Jack Carl Bobby Probstard Virginia Smith Amy Carter Jesse Vogtle	July 28 - 7 pm Council meets the second and fourth Monday at 7 pm



Prison Challenges
BY STATE SENATOR CAM WARD

Our state is at a crossroads when it comes to our prison system. People often ask me why I am so passionate about this issue. I say it is one of the biggest threats to our state's fiscal health. Our prison system is currently at 192% capacity, making it the most overcrowded system in the United States. Not only are they overcrowded, underfunded, and not well respected, they are also under the serious threat of being taken over by the federal government, which will result in wholesale release of violent criminals. Any state that has had a federal takeover will tell you that it costs hundreds of millions of dollars to come out from under such a federal receivership. That is money Alabama simply does not have.

And it gets worse from there. There is not the political will to raise taxes, and this is not something we can build our way out of even if we did have the money. Our state is finally learning to live within its means in terms of the General Fund budget, but that budget is getting even alive by two line items: Medicaid and prisons.

We can argue until we are blue in the face about the pros and cons of Medicaid expansion, but we cannot just defund our prisons. And we cannot allow the worst of the worst criminals to potentially be released back onto our streets. These guys did some not terribly nice things to get into the system, and as a society we have decreed we don't want them hanging around with the freedom to do it again.

Let me be clear: This is going to be one of the least politically popular issues our state government must take on. We face some hard choices, but we are not one of the first states to go through this. One of the wonderful things about the modern world in 2014 is the availability of information and collaboration between governments on "best practices" for seemingly intractable problems.

Two states in particular represent the best and worst of how to go about prison reform: Texas and California. California ignored the problem for too long and failed to make good decisions. A federal judge eventually came in and said they had to release 10% of their prisoners across the board. Unfortunately that allowed a whole host of terrible people to go free to commit heinous crimes. Texas, on the other hand, combined sentencing reform with a stronger approach to community corrections, probation and

Why "Unfunded" COLAs Are Bad for RSA Members

BY DAVID G. BRONKHORST

RSA members have worked very hard to earn their pensions and expect to (or already) depend on them to live. They deserve to know that those pensions are safe and secure—both now and in the future. No one understands that better than the RSA.

Over time, the purchasing power of those pensions is eroded by increases in the cost of living. This makes life very difficult for retirees living on a fixed income. In the past, the Legislature has granted Cost-of-Living Adjustments (COLAs) to RSA retirees to offset those increases. Often, those COLAs were not prefunded.

Any measure that increases RSA's financial obligations without providing additional funding for those new liabilities threatens the financial health of the entire system and, as a result, hurts its members. One of the biggest threats to the financial security and stability of the RSA is unfunded retiree COLAs. These COLAs are considered unfunded if the money necessary to pay for the raises is not deposited up front in RSA's accounts.

COLAs for RSA retirees are very expensive. For example, in 2014, a 1% COLA for all TRS and state ERS retirees would have cost \$268.6 million, which means that the bill for a 5% COLA would have been over \$1.3 billion. If that money is not placed in RSA's accounts before it must begin paying the COLA to retirees, the unfunded liabilities of the system will be increased by that amount. Thus, if a 5% unfunded COLA was given to retirees, the RSA would owe \$1.3 billion more than it has assets to cover.

Furthermore, a COLA increase goes on for a lifetime. The RSA is still paying a few members for a COLA that was granted in 1971. The unfunded COLAs passed for the TRS and ERS in 2005 and 2006 cost the RSA \$11.2 million per month.

When the Legislature passes an unfunded COLA, they are spending money that the RSA does not have. Given the uncertainty of today's economy and markets, this harms RSA's stability and our members' financial security and peace of mind. If a COLA is passed, every effort needs to be made to fund it because unfunded COLAs are very harmful to RSA members. ☉

CONTINUED ON PAGE 3

APPENDIX 4

RESOLUTION—ACT 2014-429
(Local Unit Retirees and Beneficiaries of Deceased Retirees)

Be it resolved that the (NAME OF AGENCY), through its governing authority, elects to come under the provisions of Section 2 of Act 429 of the Regular Session of the 2014 Legislature.

The (NAME OF AGENCY) agrees to provide all funds necessary to the Employees' Retirement System to cover the cost of the one-time lump sum payment as provided for by this Act for those eligible retirees and beneficiaries of deceased retirees of (NAME OF AGENCY) with the aforementioned lump sum payment being paid in October 2014.

CERTIFICATION

I, (NAME, OFFICIAL TITLE, NAME OF AGENCY), hereby certify that the foregoing is a true and correct copy of the Resolution passed on this _____ day of _____, 2014.

Signature of Official

Official Title

ARSEA/APEAL
Cost-of-Living Adjustment & BONUS History

ARSEA/APEAL'S 34 years of success in obtaining COLAs and Bonuses for public retirees is outstanding. ARSEA/APEAL is the only group that has consistently worked to provide these benefits.

- 2014 Lump Sum Bonus - \$2 per month for years of service.
- 2008 Lump Sum Bonus - \$1 per month for years of service.
- 2007 Lump Sum Bonus - \$1 per month for years of service.
- 2006 7% of gross benefits for those retiring prior to October 1, 2005.
- 2005 4% of gross benefits for those retiring prior to October 1, 2004
- 2002 3% of gross benefits.
- 2000 4% of gross benefits.
- 1998 4% of gross benefits plus \$2.00 per month for years of service.
- 1996 2% of gross benefits plus \$1.00 per month for years of service.
- 1994 2 ¼ % of gross benefits plus \$1.50 per month for years of service plus \$1.00 per month for years of retirement.
- 1993 1.28% of gross benefit plus \$1.28 per month for years of retirement.
- 1990 \$1.00 per month for years of service plus \$3.00 per month for years of retirement.
- 1988 \$1.00 per month for years of service plus \$3.50 per month for years of retirement.
- 1985 \$2.00 per month for years of service.
- 1982 \$1.00 per month for years of service plus \$1.00 per month for years of retirement.
- 1980 5% of gross benefit for those retired for 1-6 years, maximum - \$30 per month. 10% of gross benefit for those retired for 7-17 years, maximum - \$40 per month. 15% of gross benefit for those retired for more than 17 years, maximum - \$60 per month.



Date: July 11, 2014

DECATUR CITY COUNCIL DENIES BONUS TO RETIREES; MEMBERS URGED TO CONTACT DECATUR COUNCIL MEMBERS AND MAYOR

By a 3 - 2 vote on Monday, the Decatur City Council voted against the 2014 bonus that ARSEA/APEAL successfully guided through the Alabama Legislature, but time remains for the council members to change their minds.

Because the deadline for approving the bonus is August 31, we urge all of our member to contact Decatur's mayor and the city council members who opposed the bonus and encourage them to reconsider their positions.

Councilman Billy Jackson moved to approve the bonus, and Councilman Charles Kirby seconded the motion and voted in its favor, but the other three members stood in opposition with Mayor Don Kyle speaking against it, as well.

Council members Gary Hammon and Roger Anders did not make any statements about the bonus during the meeting, but voted against awarding it.

Like the bonus that state retirees will receive in October, the local bonus is calculated using a sliding scale formula of \$24.00 a year x years of creditable service, so a retiree who worked 25 years would receive \$600.

Decatur Personnel Director Ken Smith estimated that awarding the bonus, would cost the city \$161,000, but the Retirement Systems of Alabama would provide the initial funding and officials would not have to begin reimbursing the money, at a rate of \$13,500 per month, until October of 2015.

As noted before, the deadline for approving the bonus is just a few weeks away, and we encourage our members to contact the officials listed below and ask them to reverse course so this much needed bonus may be given. Let them know that retirees living on a fixed income need the bonus to help combat the rising cost of living. Urge them to do the right thing.

ARSEA APEAL

May 9, 2014

Attn: Mountian Brook Park & Recreation Board

Having been signed into law, Act #2014-429 authorizes public boards participating in the Employees' Retirement System of Alabama to fund a one-time bonus for their retirees.

Using a sliding scale formula and based upon length of creditable service (\$2.00 a month x 12 months x years of service) retirees with 25 years of service, for example, would receive a bonus of \$600. Included in the legislation is a provision for those with less than 25 years, providing a minimum payment of \$300.

The importance of even this small, one-time addition to the benefits of your retirees can hardly be overstated.

There is a short window of opportunity for the public boards to approve the funding for this bonus. Unlike traditional cost of living adjustments (COLAs), the bonus cannot be approved in subsequent years. If not granted in 2014, it goes away forever. With that in mind, the following estimated cost of funding this one-time lump sum bonus is being provided to you now:

\$1,502

Per our legislation, RSA will pay the bonus in October for those public boards opting to grant it. RSA will then recoup the cost by adding it to each participating local boards' monthly employer contribution, beginning October 1, 2015. (RSA will soon provide the actual cost and steps necessary to fund this bonus.) If you have any questions please contact us at 334-834-9116.

APPENDIX 5

100 South University Street
Montgomery, Alabama 36102

LIANE KELLY, EXECUTIVE DIRECTOR

334-834-9116
800-844-7711



ALABAMA RETIRED STATE EMPLOYEES' ASSOCIATION | ALABAMA PUBLIC EMPLOYEES' ADVOCACY LEAGUE

May 9, 2014

Attn: Mountain Brook Library Board

Having been signed into law, Act #2014-429 authorizes public boards participating in the Employees' Retirement System of Alabama to fund a one-time bonus for their retirees.

Using a sliding scale formula and based upon length of creditable service (\$2.00 a month x 12 months x years of service) retirees with 25 years of service, for example, would receive a bonus of \$600. Included in the legislation is a provision for those with less than 25 years, providing a minimum payment of \$300.

The importance of even this small, one-time addition to the benefits of your retirees can hardly be overstated.

There is a short window of opportunity for the public boards to approve the funding for this bonus. Unlike traditional cost of living adjustments (COLAs), the bonus cannot be approved in subsequent years. If not granted in 2014, it goes away forever. With that in mind, the following estimated cost of funding this one-time lump sum bonus is being provided to you now:

\$2,368

Per our legislation, RSA will pay the bonus in October for those public boards opting to grant it. RSA will then recoup the cost by adding it to each participating local boards' monthly employer contribution, beginning October 1, 2015. *(RSA will soon provide the actual cost and steps necessary to fund this bonus.)* If you have any questions please contact us at 334-834-9116.