



STAFF REPORT

DATE: August 10, 2022

DISCUSSION

AGENDA ITEM: Administration and Finance Departmental Audit Report

TO: Mayor and City Council

SUBMITTED BY: Kristina Handt, City Administrator

BACKGROUND:

At a work session earlier this year the council selected Matrix to perform an operational audit of the Administration and Finance departments. These are the final two department audits to be completed in recent years.

ISSUE BEFORE COUNCIL:

What questions does the Council have regarding the report? What recommendations are supported? Which recommendations are not supported at this time?

PROPOSAL DETAILS/ANALYSIS:

After staff and council interviews, data collection, best practices and comparative assessment, Matrix is recommending 14 changes to staffing and operations.

- 1) Key management positions should be filled with experienced staff who will assume full responsibility for their assigned duties.
- 2) The Assistant City Administrator position should be reclassified to an Administrative Services Director position.
- 3) The Administrative Services Director should be responsible for a full range of human resource activities.
- 4) The City Clerk operation should report to the Administrative Services Director.
- 5) Minor modifications should be made to the duties assigned to the City Clerk and Deputy Clerk to accommodate the Communications function.
- 6) A new position of Payroll and Payable Clerk should be established.
- 7) A new Finance Coordinator position should be established to include higher level financial duties and provide greater backup support to the Finance Director. The classification of this position should be reviewed to ensure it is in alignment with duties proposed.
- 8) Annual work plans for each department should be adopted as guiding documents that are considered a part of performance evaluations and developed in alignment with overall City priorities and budget.
- 9) The City should expand on its current performance management efforts by identifying and adopting additional performance measures to demonstrate the organization's performance and accomplishments.
- 10) The City, led by the Finance Director, should further enhance the long-range financial plans currently in place into a comprehensive forward-looking model that forecasts both operational and capital revenues and expenditures over a 10-year time horizon to ensure necessary information is available for decisions to be made on the organization's long-range fiscal health and service delivery approaches.
- 11) The City, led by the Finance Director, should implement an enhanced and detailed long-range capital budget to guide capital investments that incorporates information regarding required maintenance and replacement investments based upon actual maintenance requirements and estimated useful remaining life of each asset.

- 12) The Administration Department, led by the Administrative Services Director, should develop a methodology for predicting upcoming retirements based on age and years of service of employees and update it at least annually to anticipate which employees and skills will need to be replaced.
- 13) The City should expand on the existing training policy and implement a formal training policy outlining the annual training requirements for various positions, including required supervisory training.
- 14) The Administrative Services Director should develop a plan to fully implement the available functionalities of the Springbrook software with greatest focus on the Human Resources module.

Alan Pennington with Matrix will be at the meeting to present the report and answer any questions.

FISCAL IMPACT:

TBD

OPTIONS:

Provide direction to staff on which recommendations are supported. The personnel changes will be included in the draft 2023 budget presented to council in a couple weeks.

ATTACHMENT:

- Operational Audit of the Administrative and Finance Department

Operational Audit of the Administration and Finance Departments

LAKE ELMO, MINNESOTA

July 29, 2022

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1. Executive Summary

The Matrix Consulting Group was retained by the City of Lake Elmo to conduct an operational audit of the Administration and Finance Departments covering operations, organizational structure, and staffing levels of the City. This study was designed to provide an understanding of the organizational structure, the efficiency and effectiveness of the overall processes, operations, and technology utilization and to identify appropriate changes to improve the staffing allocations against service demands. This report summarizes the study's findings, conclusions, and recommendations.

1. Study Scope and Methodologies

In this study, the Matrix Consulting Group's project team utilized a wide variety of data collection and analytical techniques, including the following:

- **Staff Interviews and Data Collection.** Developed an understanding of operational approaches and staffing allocations in the City of Lake Elmo through interviews and data collection. Interviews focused on determining roles and responsibilities of staff, levels of services provided, resources available to perform said services, and current or potential issues. Data collection efforts were undertaken to develop an understanding of workload levels and other important documentation practices.
- **Best Practices and Comparative Assessment.** The project team utilized best practices reviews during the analysis to identify areas of strength and improvement opportunities and potential to impact staffing requirements. This was supplemented with a comparison of organizational structure and staffing with other communities.
- **Recommendations.** Based on the project team's activities and initial findings, the team analyzed issues, explored alternative service delivery options, and developed recommendations that focused on organizational needs, business processes and practices, staffing, and technology needs.

3. Listing of Recommendations

Based on the project team's assessment and analysis, there are a variety of recommendations for each service area covered in this assessment. These recommendations are discussed in detail throughout this report. Please note that recommendations are presented in the order they are discussed in the body of the report

and not listed in order of priority though priority and an implementation timeframe is provided for each recommendation.

#	Recommendation	Priority	Implementation Timeframe
1	Key management positions should be filled with experienced staff who will assume full responsibility for their assigned duties.	High	Fall 2022
2	The Assistant City Administrator position should be reclassified to an Administrative Services Director position.	High	Fall 2022
3	The Administrative Services Director should be responsible for a full range of human resource activities.	High	Fall 2022
4	The City Clerk operation should report to the Administrative Services Director.	Medium	Fall 2022
5	Minor modifications should be made to the duties assigned to the City Clerk and Deputy Clerk to accommodate the Communications function.	Medium	Fall 2022
6	A new position of Payroll and Payable Clerk should be established.	Medium	Jan 2023
7	A new Finance Coordinator position should be established that includes higher level financial duties and provide greater backup support to the Finance Director. The classification of this position should be reviewed to ensure it is in alignment with duties proposed.	Medium	Spring 2023
8	Annual workplans for each department should be adopted as guiding documents that are considered a part of performance evaluations and developed in alignment with overall City priorities and budget.	Medium	Fall 2023
9	The City should expand on its current performance management efforts by identifying and adopting additional performance measures to demonstrate the organization's performance and accomplishments.	Medium	2024

#	Recommendation	Priority	Implementation Timeframe
10	The City, led by the Finance Director, should further enhance the long-range financial plans currently in place into a comprehensive forward-looking model that forecasts both operational and capital revenues and expenditures over a 10-year time horizon to ensure necessary information is available for decisions to be made on the organization's long-range fiscal health and service delivery approaches.	High	2023 – 2024
11	The City, led by the Finance Director, should implement an enhanced and detailed long-range capital budget to guide capital investments that incorporates information regarding required maintenance and replacement investments based upon actual maintenance requirements and estimated useful remaining life of each asset.	Medium	2023 - 2024
12	The Administration Department, led by the Administrative Services Director, should develop a methodology for predicting upcoming retirements based on age and years of service of employees and update it at least annually to anticipate which employees and skills will need to be replaced.	Low	2023
13	The City should expand on the existing training policy and implement a formal training policy outlining the annual training requirements for various positions, including required supervisory training.	High	2023
14	The Administrative Services Director should develop a plan to fully implement the available functionalities of the Springbrook software with greatest focus on the Human Resources module.	High	2023 - 2024

As the recommendations table indicates, there are several opportunities for improvement in organizational structure, operational approach and staffing levels to better align service delivery with available resources. The following chapters provide context and more details regarding each recommendation.

2. Current State of Operations

The following sections outline the current staffing, organizational structure and operational practices of the Administration and Finance Department in providing services within the City of Lake Elmo.

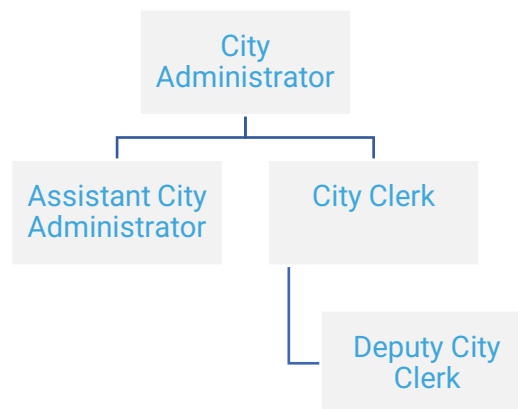
A. ADMINISTRATION DEPARTMENT

The Administration Department is responsible for the oversight of daily city operations. This includes HR and Communications functions, as well as Council relations.

(1) Organizational Structure

The following organizational chart provides an overview of the organizational structure of the Administration Department.

Administration Department Organizational Chart



(2) Staff Roles and Responsibilities

These descriptions outline the key duties of each position and are not designed to be at the job description level – but focus on the major duties of each position.

Position Title	Key Roles and Responsibilities
City Administrator	<ul style="list-style-type: none"> Manages all operations of the City under policy direction of the City Council. Main City contact for City Council. Supervises all department directors. Oversee development and presentation of budget. Main contact for City Council. Oversees development within the City. Works with outside stakeholders.
Assistant City Administrator	<ul style="list-style-type: none"> Oversees HR and Communications functions. Researches policy changes. Conducts special projects. Researches new programs and grants. Some contract management. Assists City Administrator with various tasks.
City Clerk	<ul style="list-style-type: none"> Oversees agenda creation. Creates minutes. Produces documentation when requested. Oversees record retention. Backup to various departments. Oversees elections. IT liaison.
Deputy City Clerk	<ul style="list-style-type: none"> Responsible for digital conversion of records. Oversees and administers various licensing. Assists permit clerk with Certificate of Occupancies and variances. Records and files letters of credit. Assists City Clerk with various tasks.

(3) Annual Budget

The following table summarize the departmental budget for the last three years and current budget year for the Administration Department, as well as the City's overall operating and CIP budgeting.

	Actual FY 2019	Actual FY 2020	Projected FY 2021	Budgeted FY 2022
Administration	\$ 570,322	\$ 525,678	\$ 489,584	\$ 555,181
Program	Actual FY 2019	Actual FY 2020	Projected FY 2021	Budgeted FY 2022
General Government	\$ 1,136,918	\$ 1,004,940	\$ 1,056,401	\$ 1,261,091
Public Safety	\$ 1,948,268	\$ 2,641,770	\$ 3,144,405	\$ 3,265,515
Public Works	\$ 1,862,226	\$ 1,476,101	\$ 1,570,470	\$ 2,381,179
Parks & Recreation	\$ 263,973	\$ 310,067	\$ 268,108	\$ 323,498
Transfers	\$ 742,935	\$ 1,049,508	\$ 290,746	\$ 17,254
Total	\$ 5,954,320	\$ 6,482,386	\$ 6,330,130	\$ 7,248,537

	Actual FY 2019	Actual FY 2020	Projected FY 2021	Budgeted FY 2022	
Administration	\$ 570,322	\$ 525,678	\$ 489,584	\$ 555,181	
Program	Actual FY 2019	Actual FY 2020	Projected FY 2021	Budgeted FY 2022	
CIP by Department	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Building	\$ 30,000	\$ 0	\$ 30,000	\$ 0	\$ 30,000
Fire	\$ 278,000	\$ 65,500	\$ 170,000	\$ 67,000	\$ 0
Parks & Recreation	\$ 331,430	\$ 586,213	\$ 1,122,000	\$ 75,000	\$ 0
Public Works	\$ 12,621,002	\$ 8,958,250	\$ 4,745,750	\$ 10,410,000	\$ 8,303,000
Sewer	\$ 2,959,438	\$ 707,922	\$ 2,190,000	\$ 0	\$ 0
Storm Water	\$ 0	\$ 800,000	\$ 560,000	\$ 0	\$ 0
Water	\$ 10,056,219	\$ 3,336,295	\$ 3,859,000	\$ 3,180,000	\$ 5,550,000
Total	\$ 26,276,089	\$ 14,454,180	\$ 12,676,750	\$ 13,732,000	\$13,883,000

The Administration Department is partially funded from utility revenue.

(4) Technology Utilized

The following table summarizes the key technology solutions utilized in each of the division's functional areas.

Software Name	Administration	City Clerk
Laserfiche		✓
Springbrook	✓	
Banyon (utility billing)	✓	
Polco	✓	✓
Constant Contact	✓	✓

- **Laserfiche** is used by the City Clerk and Deputy City Clerk to record documents electronically for record retention.
- **Springbrook** is used for financial operations and some human resources activities.
- **Banyon** is used to manage utility billing.

(5) Key Policies and Procedures

The following table summarizes the key adopted policies guiding operations.

Description	Summary	Date
Personnel Manual	HR & Benefits Information	1/2018

Description	Summary	Date
Compensation Policy	Performance based compensation	8/2018
While generally these policies have been reviewed and updated recently, the City should ensure, on an ongoing basis, that each of these core financial policies are reviewed and updated at least every five years.		

(6) Contracted Services

City Attorney, Assessing and Information Technology services are contracted to outside vendors by the City of Lake Elmo.

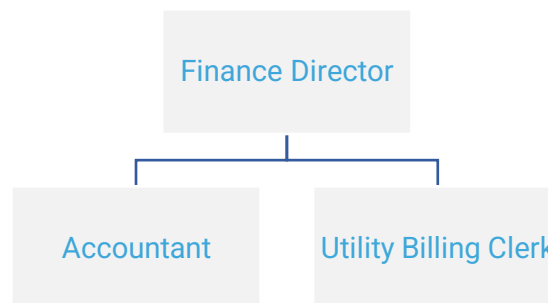
B. FINANCE DEPARTMENT

The Finance Department is responsible for the creation and analysis of the annual budget, handling all financial duties including payroll and accounts payable. The Finance Department advises the City Administrator on the budget and other financial matters.

(1) Organizational Structure

The following organizational chart provides an overview of the organizational structure of the Administration Department.

Finance Department Organizational Chart



(2) Staff Roles and Responsibilities

These descriptions outline the key duties of each position and are not designed to be at the job description level – but focus on the major duties of each position.

Position Title	Key Roles and Responsibilities
Finance Director	<ul style="list-style-type: none"> Oversee 2 staff, Accountant and Utility Billing Clerk. Manage City investments. Manages bonding and bond issues. Conducts all financial reporting.

Position Title	Key Roles and Responsibilities
	<ul style="list-style-type: none"> • Conduct bank reconciliations. • Oversee City escrow accounts.
Accountant	<ul style="list-style-type: none"> • Conduct accounts payable. • Conduct payroll. • Backup utility billing. • Work with department heads to ensure timecard accuracy.
Utility Billing Clerk	<ul style="list-style-type: none"> • Provide customer service. • Responsible for utility billing process. • Prepares invoices and billing reports. • Pursue collection of delinquency accounts.

(3) Annual Budget

The following table summarize the departmental general fund budget for the last three years for the Finance Department and the current fiscal year's budget.

Program	Actual FY 2019	Actual FY 2020	Projected FY 2021	Budgeted FY 2022
Finance	\$ 144,727	\$ 79,621	\$ 139,970	\$ 163,049

The Finance Department is partially funded from utility revenue with the Utility Billing Clerk position funded entirely from that source.

(4) Technology Utilized

The following table summarizes the key technology solutions utilized in each of the division's functional areas.

Software Name	Finance
Springbrook	✓
Banyon	✓

- **Springbrook** is the software used by Finance to conduct payroll and accounts payable.
- **Banyon** is software used by Finance to conduct utility billing and invoicing.

(5) Key Policies and Procedures

The following table summarizes the key adopted policies guiding operations.

Description	Summary	Date
Special Assessment Policy for Public Improvements	Create fair/equitable way to distribute cost of public improvements	10/2016
Fund Balance Policy	Ensure adequate fund reserve	11/2017
Debt Management Policy	Ensure City is appropriately issuing debt	11/2017
Purchasing Policy	Create decentralized purchasing process	5/2018
Cost Recovery Policy (Private Dev.)	Policy for private developers to cover cost of infrastructure	n/a
Investment Policy	Maximize security and maximize ROI	4/2019
Federal Grants Policy	Policy to align with OMB regulations	1/2022

While generally these policies have been reviewed and updated recently, the City should ensure, on an ongoing basis, that each of these core financial policies are reviewed and updated at least every five years.

C. Key Processes and Workflows

As part of the onsite evaluation, we conducted a workflow diagramming discussion with staff to understanding the major processes for key work activities specifically focused on the following areas:

- Payroll
- Accounts Payable
- Agenda Development

These workflow diagrams are presented in Appendix A.

3. Staffing Analysis

This section of the report outlines the specific recommendations regarding operational practices, staffing allocations and organizational structure for the two departments under review.

1. Key Positions in the Administration and Finance Departments Need to Fully Assume Assigned Duties.

In evaluating the operational and staffing of the Administration and Finance Departments, the most critical element that was initially observed in that the small size of the organization provides little overlap in duties between position creating significant risk to the organization to complete all duties when positions are not filled. There is no capacity within the organization to effectively provide backup on duties without impacting service delivery or performance of other duties. Additionally, it became evident quickly that the City operations within these departments are highly dependent upon the City Administrator to oversee, provide advice and direction and make many key decisions.

In looking at the appropriate organizational structure and staffing allocations, the focus was on evaluating alternatives that clearly defined the roles and responsibilities of each position and positions the organization for them to fully handle assigned duties freeing up the City Administrator to focus on more strategic and policy level decisions and practices.

Recommendation:

Key management positions should be filled with experienced staff who will assume full responsibility for their assigned duties.

2. Comparative Data Shows that Generally Staffing Allocations are in Alignment with Other Organizations.

Generally, the allocation of duties within the Administration and Finance Department is appropriate and in alignment with typical approaches utilized by other comparable Minnesota communities. A comparative survey was conducted of other municipalities in the region to understand the common approaches utilized for staffing and structuring administrative and financial operations. A summary of these findings is presented in the following table:

Comparative Survey Results for Administrative Functions

City	Population	Total Admin Staff	Chief Administrative Officer	Assistant CAO	City Clerk	Deputy City Clerk	HR Director	Communications Manager	IT Staff	Administrative Assistant
Lake Elmo	12,899	4	X	X	X	X				
Anoka (Council-Manager)	17,512	4	X	ACAO/City Clerk				X		X
East Bethel	11,958	3	X	Administrative Coordinator						X
Forrest Lake	20,393	3	X	ACAO/Airport Manager		X				
Ham Lake	16,630	2	X			X				
Hopkins (Council-Manager)	18,400	6	X	X				Communications Coordinator		(2)X
Hugo	15,008	2	X		X					
Mendota Heights	11,339	3	X	X	X					
Mounds View	13,193	5	X	X			HR Director/City Clerk	Comms Tech/Recycling Coordinator		X
North St. Paul (Council-Manager)	12,421	3	X			X		X		
Ostego	19,966	5	CAO/Finance Director	ACAO/HR Manager	X	X				X
St. Michael	17,871	4	X		X	X				X
Stillwater	19,627	6	CAO/Treasurer		X		HR Manager and HR Specialist		IT Tech and IT Specialist	X
Vadnais Heights	13,565	5	X	X		X				(2)X
Waconia	12,281	4	X	X					IT Tech	X
West St. Paul (Council-Manager)	20,615	5	X		X	X	X			X

Comparative Survey Results for Financial Functions

City	Population	Total Finance Staff	Finance Director	Assistant Director	Accountant	Accounts Payable	Utility Billing	Payroll	Other
Lake Elmo	12,899	3	X		X		UB Clerk		
Anoka (Council-Manager)	17,512	4	X	X	X	AP Clerk			
East Bethel	11,958	3	X	Finance Coordinator	Accounting Coordinator				
Forrest Lake	20,393	2	X		Accounting Manager				
Ham Lake	16,630	2	Finance/HR Director		Accounting Tech				
Hopkins (Council-Manager)	18,400	5	X		X	Accounting Tech	UB/Accounting Tech	HR/Payroll Specialist	
Hugo	15,008	3	X	Financial Coordinator	Accounting Clerk				
Mendota Heights	11,339	1	X						
Mounds View	13,193	3	X		X	AP/UB Tech			
North St. Paul (Council-Manager)	12,421	4	X		(2) Accounting Tech		UB Coordinator		
Ostego	19,966	3			X	Finance Clerk	UB Clerk		
Robbinsdale	14,393								
Rogers	13,183								
St. Michael	17,871	1	X						
Stillwater	19,627	5	X	X		AP Clerk	UB Clerk	Payroll Clerk	
Vadnais Heights	13,565	2	X		Accounting Tech				
Waconia	12,281	4	X		X	Finance Clerk			Office Assistant
West St. Paul (Council-Manager)	20,615	5	X			AR/AP Clerk		Payroll Clerk	IT Manager and Desktop Specialist

3. The Assistant City Administrator Position should be Reclassified to an Administrative Services Director position.

While the comparative survey shows a split between the approaches utilized by communities on whether an Administrative Services Director position or an Assistant City Administrator position is utilized, the Lake Elmo City organization would be better served with an Administrative Services Director position. The most pressing reason is that the organization needs a strong focus on Human Resources in addition to the general administrative support necessary to support the City Administrator. The City is more likely to recruit an individual with the necessary skills and abilities if this position is more focused and clearly defined.

Currently, this position is responsible for such a wide variety of duties, including general administrative support, some financial involvement, responsibility for human resources and labor negotiations, and public information and engagement that the skill mix is difficult to find in a single individual with the depth of knowledge necessary to fully remove the City Administrator from substantive involvement in these functions. Additionally, the skill sets required to perform these varied duties at an expert level is hard to find in one individual.

The public engagement and public information functions, including monthly newsletters and similar tasks, should be reallocated to the City Clerks operation. The two staff in this function appear to have sufficient time, skills and interest in performing these functions and this would increase the amount of time that could be spent on needed Human Resources activities.

The Administrative Services Director should serve as the Director of the Administration Department. This would include oversight of not only Human Resources functions but should also include supervision of the City Clerk's operation and Information Technology functions. This will reduce the span of control of the City Administrator. This change would have been recommended even without the recommendation of the change to the Administrative Services Director classification. Since the Information Technology function is a contracted service, the position would be primarily responsible for managing that contract and ensuring the City is receiving appropriate levels of service and timely services from the contractor.

These changes in the focus of this position would require an individual with a strong background in Human Resources, supervision and organizational development. The City should seek to recruit an individual with three to five years of experience performing these duties and prior supervisory experience. It is not an entry level position, and this may require review of the classification and compensation of the position to ensure that the appropriate candidate can be attracted.

Recommendation:

The Assistant City Administrator position should be reclassified to an Administrative Services Director position.

The Administrative Services Director should be responsible for a full range of human resource activities and serve as the Department head of the Administration Department.

The City Clerk operation should report to the Administrative Services Director.

3. Minor Modifications in the City Clerk Positions Would be Necessary Based upon Duty Allocations.

As noted in the prior section, the communications function is proposed to be moved to the City Clerk's staff. To fully implement this change, the City Clerk would be primarily responsible for Council Minutes, Agenda Packets, Election Administration, Records Management and Compliance along with the new Communications responsibilities. The Deputy Clerk would have primary responsibility for licensing, administrative permits, and elections support. The Deputy Clerk would provide support on the Communications effort.

Recommendation:

Minor modifications should be made to the duties assigned to the City Clerk and Deputy Clerk to accommodate the Communications function.

4. Staffing Modifications in the Finance Department are Required to Appropriately Align Duties and Provide the Necessary Staffing Support for the Organization.

There are two significant issues identified in the staffing allocations of the Finance Department. The first is the set of duties allocated to the Accountant. The majority of duties performed by this position are in the payroll and accounts receivable arena. From our review of the activities conducted, these are duties not typically performed by an Accountant position but a more junior position. Additionally, there is a need to develop greater focus on core financial operations and provide support to the Finance Director on higher-level financial duties.

For these reasons, it is recommended that the City of Lake Elmo create a Payroll and Payables Clerk position to handle the majority of the payroll and payables duties currently performed by the Accountant position. This position would handle the entry of payroll and payables, data clean-up, and processing of payments. The new Finance Coordinator position would provide general oversight and higher-level expertise that would not be appropriate for the Clerk to handle directly. The Administrative Services Director will work

closely with this position on HR and payroll issues and provide subject matter expertise. It will be important that, to the extent possible, the Payroll and Payables Clerk and the Utility Billing Clerk be cross trained to back-up each position when one is absent. While the duties of these position are each specialized, the size of the organization requires this backup support to ensure overall operations can continue seamlessly when a specific individual is absent.

The City should implement a new position of Finance Coordinator to conduct higher level duties including audit preparation and support, bank reconciliations, grants management, investment management, budget development and monitoring, financial projections, revenue reviews, and other core financial duties in support of the Finance Director. This will not only provide the resources necessary to effectively perform required duties but provide succession planning and backup on core financial duties to the Finance Director. It would be appropriate to have the Utility Billing Clerk and the new position of Payroll and Payables Clerk report to the Finance Coordinator position. The implementation of this recommendation will require the creation of a new job description and assigning a compensation range for the position consistent with the new pay structure.

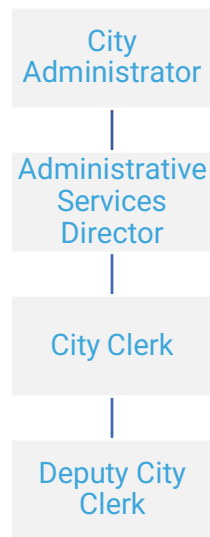
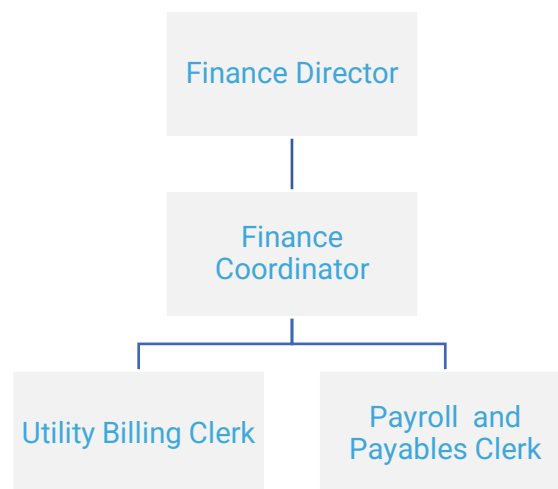
Recommendation:

A new position of Payroll and Payable Clerk should be established.

A new Finance Coordinator position should be established that includes higher level financial duties and provide greater backup support to the Finance Director. The classification of this position should be reviewed to ensure it is in alignment with duties proposed.

4. Proposed Organizational Structure and Staffing Allocations.

The following organizational charts show the future structure of the Administration and Finance Departments if the above recommendations are implemented.

Administration Department Organizational Chart**Finance Department Organizational Chart**

4. Operational Analysis

This chapter outlines key operational recommendations designed to improve the operational practices of the two departments and implement best practices or better align service delivery within the organization.

1. Departmental Annual Workplans Should be Developed.

The effectiveness of the City's service delivery can be enhanced by ensuring that the key efforts of each department are well delineated and that these are used as the basis for on-going policy and management decisions. In particular, the City should adopt annual departmental workplans that are in alignment with the budget and the highest priorities identified for the coming year and that appropriate performance metrics are utilized to track and manage operations. Annually, departments should develop their annual workplan and notate the key efforts that will further or support the achievement of the strategic goals – or position the City operations to move closer to the achievement of the goals so that there is alignment between these annual workplans and the budget process.

Annual workplans should be a guiding effort for each department's focus during the year, and a portion of the performance evaluation for staff in that department should be linked to accomplishing the workplan. Progress on the workplans should be reviewed at least quarterly between the City Administrator and the respective department head. A semi-annual update on progress should be provided to the City Council.

As part of the budget review of annual workplans, the City Council will be provided the opportunity to make policy decisions that will ensure alignment with the resources allocated and the work activities to be performed. This review and decision-making process will help to ensure that expectations and ability to perform are consistent between staff and the City Council. Resources may need to be adjusted if items not contained within the annual workplans are desired to be performed by the City Council.

Recommendation:

Annual workplans for each department should be adopted as guiding documents that are considered a part of performance evaluations and developed in alignment with overall City priorities and budget.

2. The City Should Implement an Expanded Performance Measurement Program.

The City of Lake Elmo should implement a more data-informed decision-making framework to more effectively document existing performance and provide data for future decision-making regarding service levels and, in some cases, staffing levels

needed to maintain or change service levels. By collecting, analyzing and utilizing data regarding service provision, the City can improve decision-making and education of the public regarding City overall performance and ensure transparency for the organization regarding service levels. In many departments currently, there is good data available regarding workloads and performance but there is little organizational capacity to effectively evaluate this information, develop reports, and evaluate improvement opportunities.

The City recently began participation in the Performance Measurement Program conducted by the Office of the State Auditor. This provides a starting point for integrating performance measurement into the decision-making process of the City. The City should expand on this effort by developing an additional set of critical performance metrics for each department and track the City's performance in meeting these measures. This information should be widely reported – both to the City Council and the public – and published in a dashboard approach on the City's website similar to the approach that is currently undertaken to report the City's results from the Office of State Auditor's Performance Management Program. Most important, the City should attempt to identify performance metrics that report on outcomes achieved from the services provided and which are linked to the overall adopted strategic goals of the City.

An effective and robust performance measurement program is designed to meet many organizational needs. Some common aspects include:

- Serving as a tool to assist in the evaluation of the quality and effectiveness of operations. It is accomplished by collecting, analyzing, and reporting performance-related data.
- Measures can be based on inputs (resources used), outputs (activities performed), efficiency measures (ratio between inputs and outputs), or outcomes (results achieved). Efficiency and outcome measures are often the most difficult to effectively measure or quantify but provide more useful data than simple input/output counts.
- Government accountability is often a driving factor in local government use of performance measurement. Effective use of performance measures can enhance transparency and public trust.
- Measures should ideally be aligned with adopted strategic goals. Is progress being made toward the highest-level goals? What has the greatest effect on the people served?
- The performance measure should be easily understood by the general public. Overly complicated or obscure measures, even if providing great data on performance, will not be effective if the public cannot understand what it is

showing. Some measures are more important for use by managers to make decisions but aren't appropriate for public reporting.

A department may monitor more performance measures than those reported as part of the City's dashboard. Public facing measures should be ones that inform on overall service outcomes, when possible, and that provide insight to the public and policy makers regarding City performance. Additional measures may be utilized internally, only by the City Administrator and Department Heads, as indicators of staff or process efficiency and/or effectiveness.

Ideally, the performance measures would be provided on the City's website with frequent updating (to maintain relevancy) at least quarterly. Given the recent efforts undertaken by the City in this effort, the organization is beginning to incorporate into its culture the use of performance measurement and this recommendation will only require expansion and refinement of the measures to provide valuable information to the organization and policy makers.

Recommendation:

The City should expand on its current performance management efforts by identifying and adopting additional performance measures to demonstrate the organization's performance and accomplishments.

2. The Finance Department Enhance Efforts on Long-Range Financial Planning Grants Management, and Revenue Management.

The City of Lake Elmo should enhance and utilize a more defined long-range capital improvement plan, a ten-year fiscal plan (that forecasts operating and capital revenues and expenditures), and other organizational development activities to continually evaluate the organization's changing needs and service demands resulting from population growth and the changing complexity of the organization.

Unlike many organizations the size of Lake Elmo, the City has developed two documents that take a long-range view of the City's financial condition. The City developed internally a long-range plan for the tax levy and contracted for the development of a long-range financial plan for utilities. These two efforts provide a strong foundation for further enhancement of the City's planning and focus on forecasting financial condition into the future. Longer-term, the City should target the ability to conduct projections for the financial plan for utilities in-house but periodically an external review or study provides valuable input and validation of assumptions.

The City should build upon these efforts to integrate into a single financial projection model the projected expenditures and revenues of the organization to provide a

framework for evaluating policy decisions, proposed revenue changes, and staffing or expenditure impacts on the overall health and sustainability of the City organization.

Similarly, there is a significant need for an individual to focus on managing the approved capital project program throughout the year to ensure that all capital investments are appropriately planned, financed and expenditures accounted for in a timely manner. The City has developed a strong base CIP document and planning approach and tool. This can be enhanced by further linking asset conditional assessment and maintenance planning to develop more refined and accurate projections of investments necessary to maintain all infrastructure and assets of the community.

These types of plans are critical and necessary for the City to plan for the future and enable the elected officials to focus on setting policies and priorities to guide future operations. They ensure that focus is placed beyond the current budget-cycle or two and information is available to guide decisions and understand the long-term impact of policy decisions.

Finally, the City should continue to ensure that the Finance Director, or the new Finance Coordinator, is focused on grants management activities to ensure the City is fully compliant with all grant requirements, reporting requirements, and effectively pursuing all available grant opportunities. These duties will be able to be effectively performed by the Department with the creation of the Finance Coordinator position previously recommended as this will significantly enhance the skill set with the department allocated to higher level financial duties.

Recommendation:

The City, led by the Finance Director, should further enhance the long-range financial plans currently in place into a comprehensive forward-looking model that forecasts both operational and capital revenues and expenditures over a 10-year time horizon to ensure necessary information is available for decisions to be made on the organization's long-range fiscal health and service delivery approaches.

The City should implement an enhanced and detailed long-range capital budget to guide capital investments that incorporates information regarding required maintenance and replacement investments based upon actual maintenance requirements and estimated useful remaining life of each asset.

3. Additional Workforce Planning Should be Undertaken.

Information about upcoming retirements can be used in an organization to determine when vacancies are likely to open up in various departments, which allows HR staff to get a head start on developing a qualified pool of applicants and minimize impacts of

vacancies in critical positions. Anticipating openings due to retirement can help the department begin to make decisions about succession planning tactics sooner rather than later. Currently, the City does not currently have a formal methodology for projecting the likely retirement or separation of employees over time. In order to optimize the effectiveness of the recruitment staff in this effort, the City should adopt a more formal workforce and retirement planning model. While recently most impacts have been from departures of staff due to reasons other than retirement, those cannot be controlled or planned for in the same manner that retirements can be. While this will not address all issues regarding operational impacts from departures, it can assist in mitigating them.

One model for projecting employee retirement involves totaling employees' ages and their years of service, and indexing those totals at the current time, as well as for future dates, to determine likely retirements. Both of those figures could easily be obtained from data readily available. An example of this method is depicted in the table below:

Employee	Age	Years	Current Total	2 Year Total	5 Year Total
Employee 1	23	1	24	28	34
Employee 2	48	15	63	67	73
Employee 3	45	19	64	68	74
Employee 4	50	19	69	73	79
Employee 5	48	23	71	75	81
Employee 6	48	24	72	76	82
Employee 7	49	27	76	80	86
Employee 8	52	25	77	81	87
Employee 9	54	32	86	90	96
Employee 10	57	35	92	96	102

Existing data should be sufficient to generate reports such as the one above (or at least data that can be presented as a report). These projections should be updated on at least an annual basis in order to account for employee turnover and refresh the department's strategy for replacing lost employees and skills.

Employee skills and certifications could also be included in these projections. This would help the HR department anticipate when skills will be lost and begin strategizing to

replace them, either by hiring new employees with the desired skills or by incentivizing existing employees to acquire those skills and certifications.

Recommendation:

The Administration Department, led by the Administrative Services Director, should develop a methodology for predicting upcoming retirements based on age and years of service of employees and update it at least annually to anticipate which employees and skills will need to be replaced.

4. The City Should Coordinate and Provide a More Comprehensive Training Effort for all City Staff.

The provision of training is currently a shared responsibility between the City's Human Resources function and the operating departments. While Administration provides centralized training opportunities (on-boarding and overall City policies), departmental managers are responsible for job specific training for their employees. An expanded policy and practice should be adopted that outlines the type, amount and frequency of training that will be provided to employees and clearly state whether the responsibility lies with the Human Resources function or with the specific operating department. This policy should outline and differentiate the required training for general employees and for supervisory employees.

At a minimum, the policy should provide the following for supervisory personnel: an annual allotment of eight hours covering basic supervisory practices, supplemented by refresher training on sexual harassment, diversity, and equal employment practices. Job specific training should continue to be provided by the operating department (and included as part of each individual employee performance appraisal) but tracked and monitored in a centralized training database / software maintained by Human Resources.

The policy should provide for a feedback mechanism to accomplish two objectives: solicit feedback from local managers on gaps in employee performance that could be mitigated by additional training opportunities; and solicit feedback on results and effectiveness of specific training efforts to allow program modification.

Recommendation:

The City should expand on the existing training policy and implement a formal training policy outlining the annual training requirements for various positions, including required supervisory training.

5. A Plan Should be Developed to Fully Implement the Functionality of Springbrook.

The City of Lake Elmo utilizes Springbrook as its primary software to support operations especially in the arena of financial management. With the last several years, the City has purchased the human resources module but has not made much progress on the implementation of the features now available to it. It is making significant use of many of the financial modules in alignment with organization's size and complexity. As the organization grows, there will be opportunities to further enhance the use of the system through additional automation of some financial practices including electronic review, processing and approvals related to purchasing, payables and receivables.

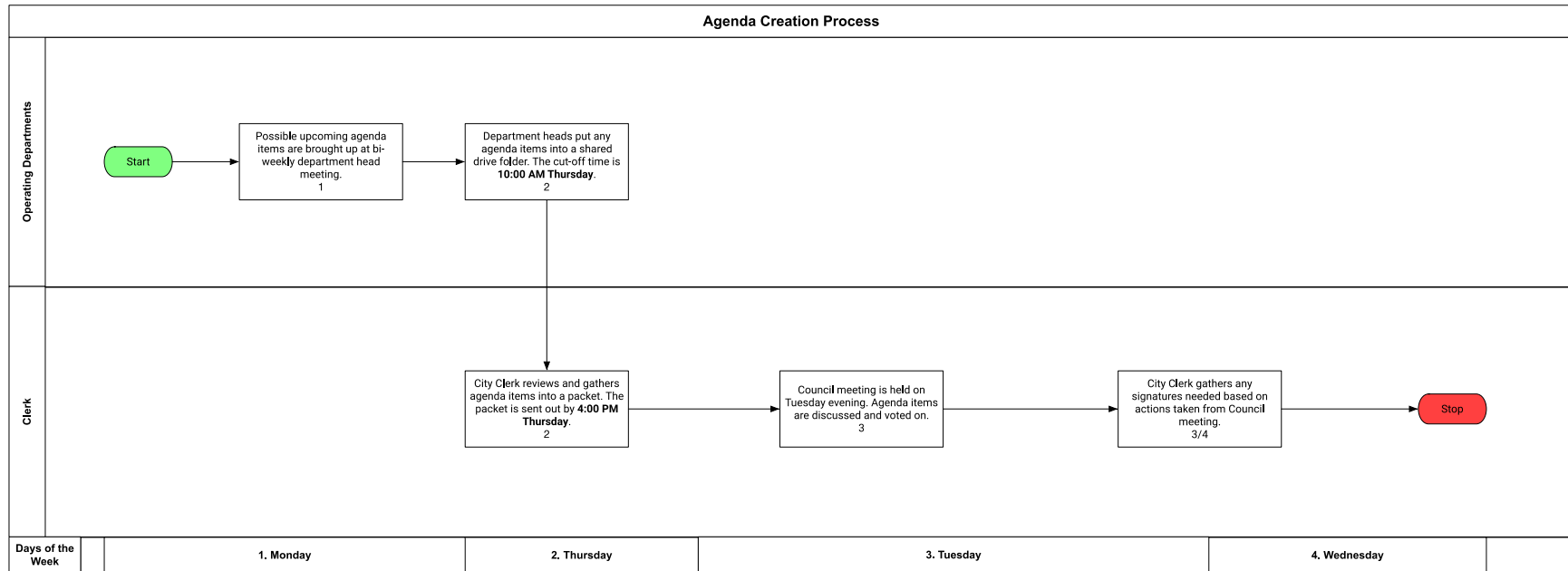
In general, the greatest current opportunity available to the City that would enhance internal operating practices, and advance the management of personnel, is the implementation of and use of the human resources module. This module provides a full suite of human resources functionality including integrating HR actions and payroll processing, employee self-service, open enrollment opportunities, and customizable personnel action forms to handle a multitude of HR processes by routing forms for completion and approval online.

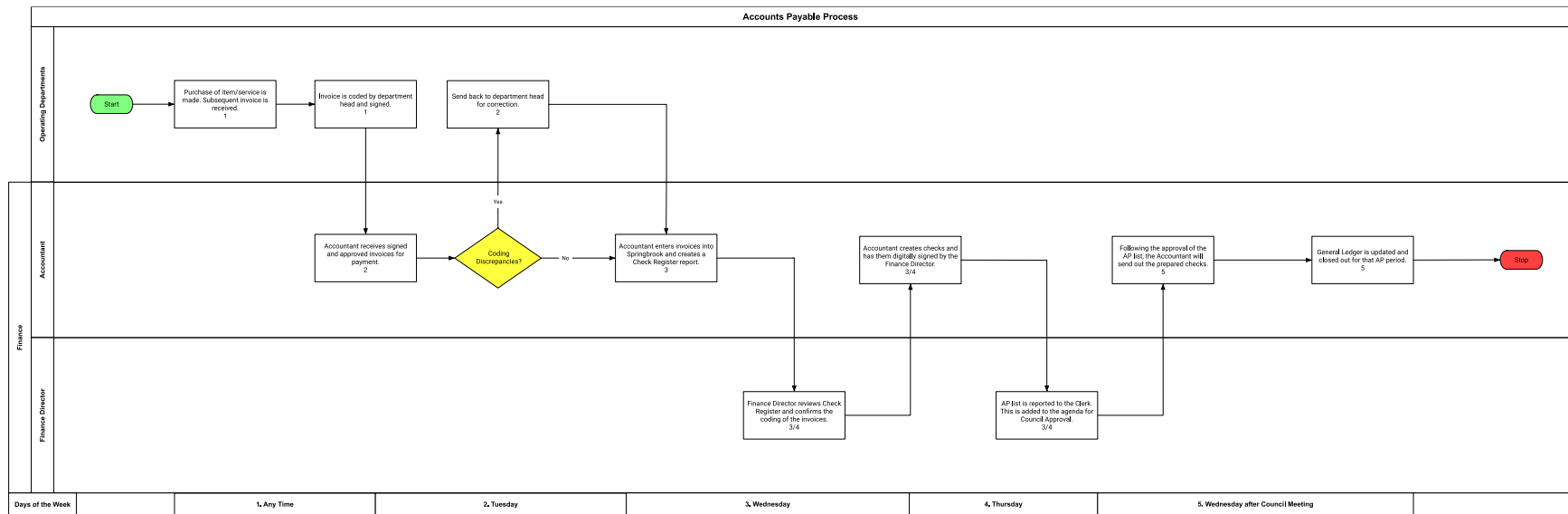
Once the new position of Administrative Services Director is filled and the individual has time to acclimate to the position, one of the highest priorities should be the development of a timeframe for implementation of the HR module. This should eliminate many manual processes, increase the data developed and maintained on employees in an efficient manner, and increase accuracy and compliance for HR activities. While an important next step for increase the efficiency of this area, it should be appropriately prioritized within the overall workplan for this position to ensure it is implemented appropriately.

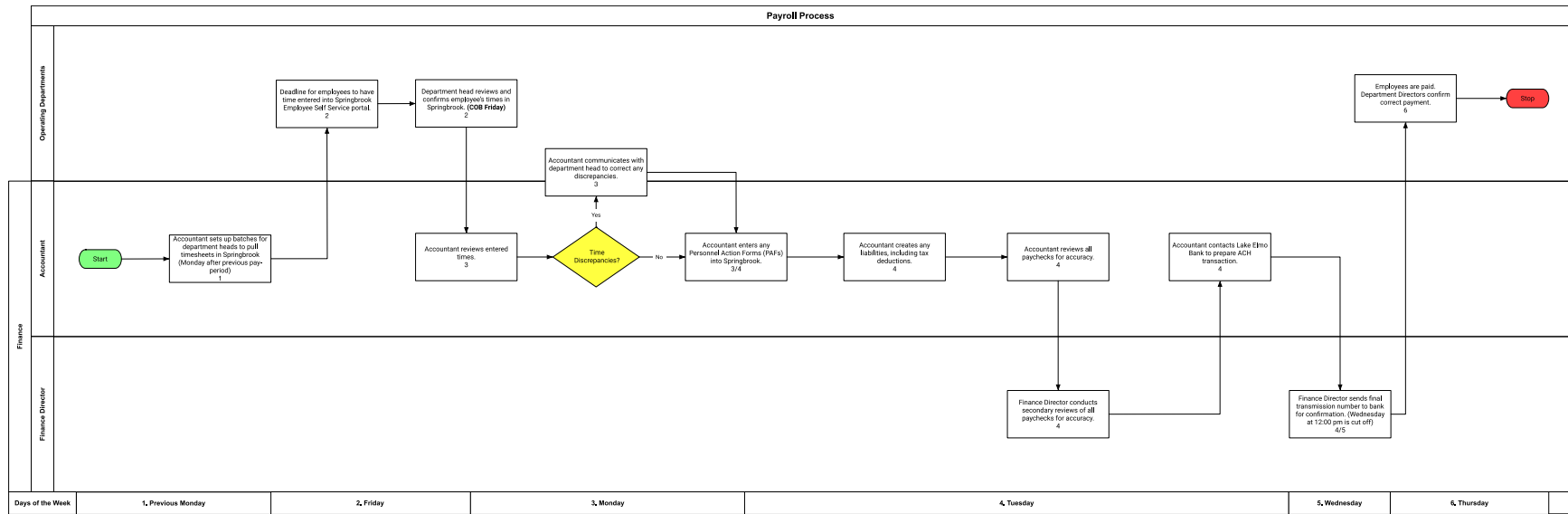
Recommendation:

The Administrative Services Director should develop a plan to fully implement the available functionalities of the Springbrook software with greatest focus on the Human Resources module.

Appendix A – Workflow Diagrams







Appendix B – Sample Job Descriptions

Sample job descriptions for the Administrative Services Director, Financial Coordinator and Payroll and Payables Clerk are provided on the following pages.

Administrative Services Director

Job Title: Administrative Services Director

Department: Administration

Status: Full-time regular position

Benefits: Qualifies for full-time benefits

Reporting Relationship: Reports to City Administrator

Supervisory Duties: Supervises exempt and non-exempt staff

Position Details: This position performs a wide variety of administrative responsibilities and interacts routinely with the public and other agencies. This position assists primarily in the areas of Human Resources, Contractual IT operations, and General Administration. Supervises City Clerk and Communications functions. With the wide variety of work, this position works with all departments to carry out the work of the City.

Human Resources:

- Manage recruitment process for all departments. Assemble employment application information, post and publish advertisements, assist in development of selection procedures, assist in evaluating qualifications of candidates, develop interview questions, and participate in interviews as requested.
- Evaluate and administer benefit programs, including health, dental, life, long- term disability, and supplemental insurance plans. Manage employee health coverage enrollment and termination.
- Responsible for overseeing city's safety program and serves as Administrative department representative and manager for employee safety committee; coordinate employee safety training schedule with contracted consultants, as applicable; responsible for preparing and maintaining annual OSHA reports, Worker's Compensation insurance reports, and property and casualty insurance claims process with insurance vendors.
- Provide oversight and technical assistance for the preparation and processing of payroll and benefit forms. Maintain confidential employee personnel files. Research and respond to employee inquiries, employment verifications, and draft routine correspondence.
- Perform and coordinate employee orientation and training.
- Coordinate drug and medical testing.
- Comply with all federal and state reporting standards (Worker's Compensation, COBRA, HIPAA, etc.).
- Communicate policies and procedures as adopted by the City Council to employees in written and verbal format.
- Participates in union negotiations
- Coordinate and research all personnel issues necessary to properly administer municipal employment.
- Assist with pay plan administration, pay equity, and job analysis.
- Participate in the development of operations policies, practices, procedures, and recommendations to the City Administrator and City Council.
- Assist in development and oversight of wellness programs.
- Assist with Data Practices policy development and implementation.
- Facilitate the city's Human Resources Committee including but not limited to agenda

preparation, research, committee minutes, etc.

General Administration:

- Communicate and recommend measures to improve operations and employee performance both within the department and the organization as a whole.
- Coordinate contract management for the City on general contracts (including but not limited to prosecution contract, law enforcement contract, cellular antenna contracts, information technology contract, etc.)
- In conjunction with Finance Director, involved in oversight of the City's general liability and workers compensation insurance programs.
- Facilitate the City's Environmental Committee including but not limited to agenda preparation, research, committee minutes, etc.
- Assist with the maintenance of the City's records management system.
- Serve as liaison with state, county, and local officials to exchange information and coordinate activities associated with this position.

While these areas are the primary focus of the position, we believe strongly in teamwork and employees will be called upon to perform a variety of duties as a part of their role with the City. This position may be called upon to conduct special research and project oversight for a variety of administrative functions within the municipal organization.

Position Requirements

Knowledge, Skills and Abilities:

- Knowledge of federal and state statutes, city codes, and other requirements affecting municipal government operations.
- Thorough knowledge in the areas of public sector personnel/human resources administration, principles, practices, and techniques including legal requirements.
- General knowledge of City Clerk and Communication functions.
- Write clear and interesting articles, stories, social media posts, and other education and promotional material.
- Considerable ability to interpret policy decisions and guidelines and to develop practical solutions and programs.
- Considerable ability to resolve conflicts and negotiate solutions.
- Considerable ability to maintain confidential or proprietary information within the bounds of the law.
- Skill in analyzing facts, organizational procedures, and operational considerations.
- Ability to work independently, determine priorities, work collaboratively, and make appropriate decisions.
- Demonstrates a working knowledge of records management and MN data practices
- Demonstrates a working knowledge of advanced office practices, procedures, equipment and Microsoft Office
- Commitment to exceptional customer service and positive attitude
- Demonstrates a team player approach and high level of professionalism in assisting staff
- Demonstrates initiative in process improvement opportunities
- Ability to perform successfully with minimal supervision
- Ability to maintain effective and positive working relationships with staff and the public

Education: Bachelor's Degree in public administration, business administration, human resources or related field.

Requirements: Minimum of three years' experience working in local government including prior experience as supervisor.

Specific requirements for this job include:

- Valid MN Driver's License
- Process basic computers skills, including a good knowledge of and experience using:
- E-mail and Microsoft Outlook
- Web Browsing
- Adobe PDF Viewer
- Microsoft Office Products

Desired Qualifications:

- Master's degree in public administration, business administration, human resources or related field.
- Five or more years practical experience in personnel administration, business administration or local government
- Knowledge of records management and MN data practices
- Experience in the fundamentals of human resources
- Initiative to look for continual improvement opportunities
- Ability to exercise independent judgement and discretion in decision-making
- Ability to effectively problem solve using analytical and strategic thinking

Physical and Mental Requirements: Positions in this job typically require sitting, feeling, manual dexterity, grasping, talking, hearing, typing, and seeing. This position encounters unexpected and prolonged workdays and stress and pressure from dealing with emotional issues and conflicts. There is also sustained exposure to computer keyboards and video screens. This position is generally light-duty and may require the exertion up to 20 pounds of force on occasion and the ability to lift, carry, push, pull and move objects. The individual may encounter unexpected and prolonged workdays and stress and pressure from dealing with emotional issues and conflicts.

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

Working Conditions: Most work is performed in an office setting

***The work environment characteristics described here are representative to those an employee encounters while performing essential functions of this job. Reasonable accommodations can be made to enable individuals with disabilities to perform the essential functions.*

Competencies Common to All City Positions:

- Develop, maintain a thorough working knowledge of, and comply with all departmental and applicable City policies and procedures
- Demonstration by personal example the spirit of service, excellence, and integrity expected from all staff.
- Develop respectful and cooperative working relationships with co-workers, including willing assistance to newer staff so job responsibilities can be performed with confidence as quickly as possible.
- Confer regularly with and keep immediate supervisor informed of all important matters which pertain to the applicable job functions and responsibilities.
- Represent the City of Lake Elmo in a professional manner to the general public, outside contacts and constituencies.

Financial Coordinator

Job Title: Financial Coordinator

Department: Finance

Status: Full-time regular position

Benefits: Qualifies for full-time benefits

Reporting Relationship: Reports to Finance Director.

Supervisory Duties: May supervise non-exempt staff (Utility Billing Clerk and Payroll and Payables Clerk)

Position Details: Performs difficult and complex professional and administrative work in planning, organizing and directing the financial activities of the City; does related work as required. Work is performed under general supervision of the Finance Director. May serve as Finance Director during Finance Director's absence.

ESSENTIAL FUNCTIONS/TYPICAL TASKS:

(These are intended only as illustrations of the various types of work performed. The omission of specific duties does not exclude them from the position if the work is similar, related, or a logical assignment to the position.)

Planning, organizing, directing and supervising financial programs, systems and services; coordinating work with other departments and Finance Director; maintaining records and files; preparing reports.

1. Plans, organizes and directs the activities of the Finance Department, including accounting, utility billing, collections, purchasing, fixed assets, budget, investments, accounts payable and other services.
2. Assists with the preparation of the annual budget (operating and capital) and Comprehensive Annual Financial Report.
3. Maintains all financial and accounting systems.
4. Supports management of investment program.
5. Monitors and reconciles budget expenditures.
6. Assists Finance Director with the development and implementing financial policies and systems.
7. May assist with the development and preparation of monthly and annual financial statements.
8. Oversees liability insurance and worker's compensation programs in conjunction with Administrative Services Director. Serves as risk manager. Advises officials on potential sources of loss. Analyzes and controls exposures to loss. Develops risk management techniques. Arranges insurance protection.
9. Plan and direct the work of assigned division staff; meet with staff to identify and resolve problems; assign work activities, projects and programs; monitor workflow; review and evaluate work products, methods and procedures.
10. Review and verify a variety of documents and forms for the Accounting Division including invoices, authorizations and vendor data; review and approve selected accounting entries and transactions; prepare correcting or adjusting entries as necessary.
11. Assist with the annual independent audit including selections, confirmations, schedules and audit adjustments; assist audit staff as necessary; assist in preparing City's formal response to audit

- recommendations; develop and monitor internal control procedures for the Accounting Division resulting from independent auditor's recommendations and self-assessment.
12. Supervise and participate in the preparation of difficult and complex financial and administrative reports; prepare and analyze financial reports and records to determine trends or irregularities.
 13. Assists other departments with the development and implementation of financial systems.
 14. Performs all analytical review procedures and financial documents deemed appropriate.
 15. Prepares revenue projections, capital and financing schedules, and cost estimates.
 16. Assists external auditors with annual audit.
 17. Performs related tasks as required.

KNOWLEDGE, SKILLS AND ABILITIES:

Comprehensive knowledge of general laws and administrative policies governing municipal financial practices and procedures; comprehensive knowledge of the principles and practices of accounting and budgeting in government; ability to evaluate complex financial systems and efficiently formulate and install accounting methods, procedures, forms, and records; ability to prepare informative financial reports; ability to plan, organize, direct and evaluate work of subordinate employees; ability to establish and maintain effective working relationships with governmental officials and associates; ability to formulate long-range fiscal planning.

EDUCATION AND EXPERIENCE:

Any combination of education and experience equivalent to graduation from and accredited college or university with major course work in accounting, economics, or public administration and three to five years' experience in public finance administration.

PHYSICAL REQUIREMENTS:

This is sedentary work requiring the exertion of up to 10 pounds of force occasionally and a negligible amount of force frequently or constantly to move objects; work requires standing, walking, fingering, feeling, and repetitive motions; vocal communication is required for expressing or exchanging ideas by means of the spoken word; hearing is required to perceive information at normal spoken word levels; visual acuity is required for preparing and analyzing written or computer data, determining the accuracy and thoroughness of work, and observing general surroundings and activities; the worker is not subject to adverse environmental conditions.

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

Working Conditions: Most work is performed in an office setting

***The work environment characteristics described here are representative to those an employee encounters while performing essential functions of this job. Reasonable accommodations can be made to enable individuals with disabilities to perform the essential functions.*

SPECIAL REQUIREMENTS:

Possession of an appropriate driver's license valid in the State of Minnesota.

Competencies Common to All City Positions:

- Develop, maintain a thorough working knowledge of, and comply with all departmental and applicable City policies and procedures
- Demonstration by personal example the spirit of service, excellence, and integrity expected from all staff.
- Develop respectful and cooperative working relationships with co-workers, including willing

assistance to newer staff so job responsibilities can be performed with confidence as quickly as possible.

- Confer regularly with and keep immediate supervisor informed of all important matters which pertain to the applicable job functions and responsibilities.
- Represent the City of Lake Elmo in a professional manner to the general public, outside contacts and constituencies.

Payroll and Payables Clerk

Job Title: Payroll and Payables Clerk

Department: Finance

Status: Full-time regular position

Benefits: Qualifies for full-time benefits

Reporting Relationship: Reports to Accounting Coordinator.

Supervisory Duties: This position has no supervisor duties.

Position Details: To perform a variety of accounting functions including accounts payable, payroll, associated reconciliations and reporting, and other duties as assigned. This position provides back up to the Utility Billing Clerk as needed.

Accounts Payable:

- Responsible for processing accounts payable
- Responsible for Department filing and reporting
- Coordinate with Departments to ensure vouchers are properly coded and approved for payment

Payroll:

- Responsible for processing payroll and all state and federal related reporting
- General knowledge of benefits and new hire requirements
- Responsible for gathering of timesheets, data entry of time, and issuance of electronic transfers to employees

While these areas are the primary focus of the position, we believe strongly in teamwork and employees will be called upon to perform a variety of duties as a part of their role with the City.

Position Requirements

Knowledge, Skills and Abilities:

- Demonstrates ability to prioritize tasks, solve problems and meet deadlines
- Invoicing associated with accounts receivable and payable procedures.
- Practices, procedures, methods and equipment used in creating and posting invoices.
- Basic mathematics.
- Basic principles and practices of financial record keeping.
- Works well with internal staff and provides them with accurate and timely financial reports and problem resolution when appropriate.
- Makes minimal errors completing entries, reconciliations, monthly billings, calculations, subsidiary spreadsheets, accounts payable and payroll processing
- Ability to perform with minimal supervision.
- Contributes to the team effort and positive image of the Department by consistently providing a high level of support to internal and external customers.
- Promptly resolves accounting problems in a constructive and well-documented manner
- Maintain internal and external relationships via in-person, phone, or e-mail with residents,

vendors, other city staff, and professionals

Education: Possession of a High School diploma or G.E.D. Certificate. Additional specialized training and/or college level coursework in accounting or a related field is desirable

Minimum of three years' experience in processing payroll and accounts payable functions.

Process basic computers skills, including a good knowledge of and experience using:

- E-mail and Microsoft Outlook
- Web Browsing
- Adobe PDF Viewer
- Microsoft Office Products

Desired Qualifications:

- Education and experience in processing payroll and financial transactions.
- Ability to exercise independent judgement and discretion in decision-making
- Ability to effectively problem solve using analytical and strategic thinking
- Knowledge of principles and practices of local government
- Advanced computer software experience and proficiency in word, excel and other financial software packages

Physical and Mental Requirements: Positions in this job typically require sitting, feeling, manual dexterity, grasping, talking, hearing, typing, and seeing. This position encounters unexpected and prolonged workdays and stress and pressure from dealing with emotional issues and conflicts. There is also sustained exposure to computer keyboards and video screens. This position is generally light-duty and may require the exertion up to 20 pounds of force on occasion and the ability to lift, carry, push, pull and move objects. The individual may encounter unexpected and prolonged workdays and stress and pressure from dealing with emotional issues and conflicts.

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Working Conditions: Most work is performed in an office setting

Competencies Common to All City Positions:

- Develop, maintain a thorough working knowledge of, and comply with all departmental and applicable City policies and procedures
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- Represent the City of Lake Elmo in a professional manner to the public, outside contacts and constituencies