



Carroll County

Organizational and Workforce Assessment

Assessment Report

March 2022

Report Organization

Background and Context

Assessment Findings

Assessment Recommendations

Appendix

Report Organization

- Background and Context
- Assessment Findings
- Assessment Recommendations
- Appendix

Executive Summary

Carroll County has a workforce that is deeply committed to serving its citizens, and many employees have had a long career in County government. Following the Great Recession, the County was forced to make significant cuts and reductions in staffing in 2009. Approximately 100 positions were lost, but the County has continued to provide essentially the same level of services to constituents with fewer resources. The County has avoided raising tax revenues and fees, and County workers have continued to operate and provide the same levels of support with fewer resources and people.

At the same time, broader workforce trends have emerged since the 2020 Pandemic, including an accelerated number of retirements, high turnover of employees, and a critical labor shortage. Carroll County has lost competitive ground in compensation and broader offerings critical to attracting and retaining talent, and has already felt the impacts of the labor shortage with challenges recruiting and hiring employees. In addition, over the next five years, the County will lose a significant portion of its workforce to retirements, and is not well positioned to manage the looming staffing shortage and attract or promote talent to fill those roles. The combination of these factors will likely make it very difficult to maintain operations and services at their current levels.

Transformational change will be needed to prepare for these impacts, and the County will need to develop a comprehensive strategy and plan to address future needs. This report outlines the most critical opportunities that need to be addressed, and a roadmap for supporting organizational, operational, and culture changes.



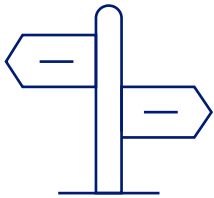
Background and Context

Pre-Pandemic Workforce Trends

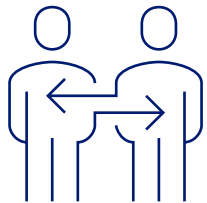
Before the tremendous disruptions of the pandemic, emerging workforce trends across the US were already beginning to shape a new world of work:



Changing workforce demographics. A growing Millennial and Gen Z workforce was challenging organizations to adopt more innovative HR strategies and practices: **Millennials and Gen Z workers will represent 75% of the US workforce by 2025.**



An aging workforce. Since 2011, Baby Boomers have been retiring in record numbers. **Ten thousand people turn 65 every day in the United States, a rate that will continue until 2030.**



Low unemployment. Prior to the pandemic, the **US experienced the lowest unemployment rates in over 50 years**, significantly increasing competition for talent.

Background and Context

The Post-Pandemic Workforce

Nationwide Labor Shortage

Coming out of the Pandemic, employers across nearly every industry are experiencing significant workforce pressures and labor shortages



Accelerated Retirements

- In 2019, 2 million Americans retired and in 2020, 3 million retired
- Through 2021, there were 3.3 million more retirees than the beginning of 2020

Women in the Workforce

- In 2020, 2.5 million women left the workforce
- While some have returned, there were 1.8 million fewer women in the workforce in 2021

Transfer of Wealth

- An estimated ~\$68 trillion dollars will transfer from the baby boomer generation to Millennials before the year 2030

Declining Birth Rates

- Declines in birth rates began in the 1980s and 1990s
- By the year 2026 there will be a significant drop in 18 year olds

Background and Context

The Post-Pandemic Workforce

The Great Resignation

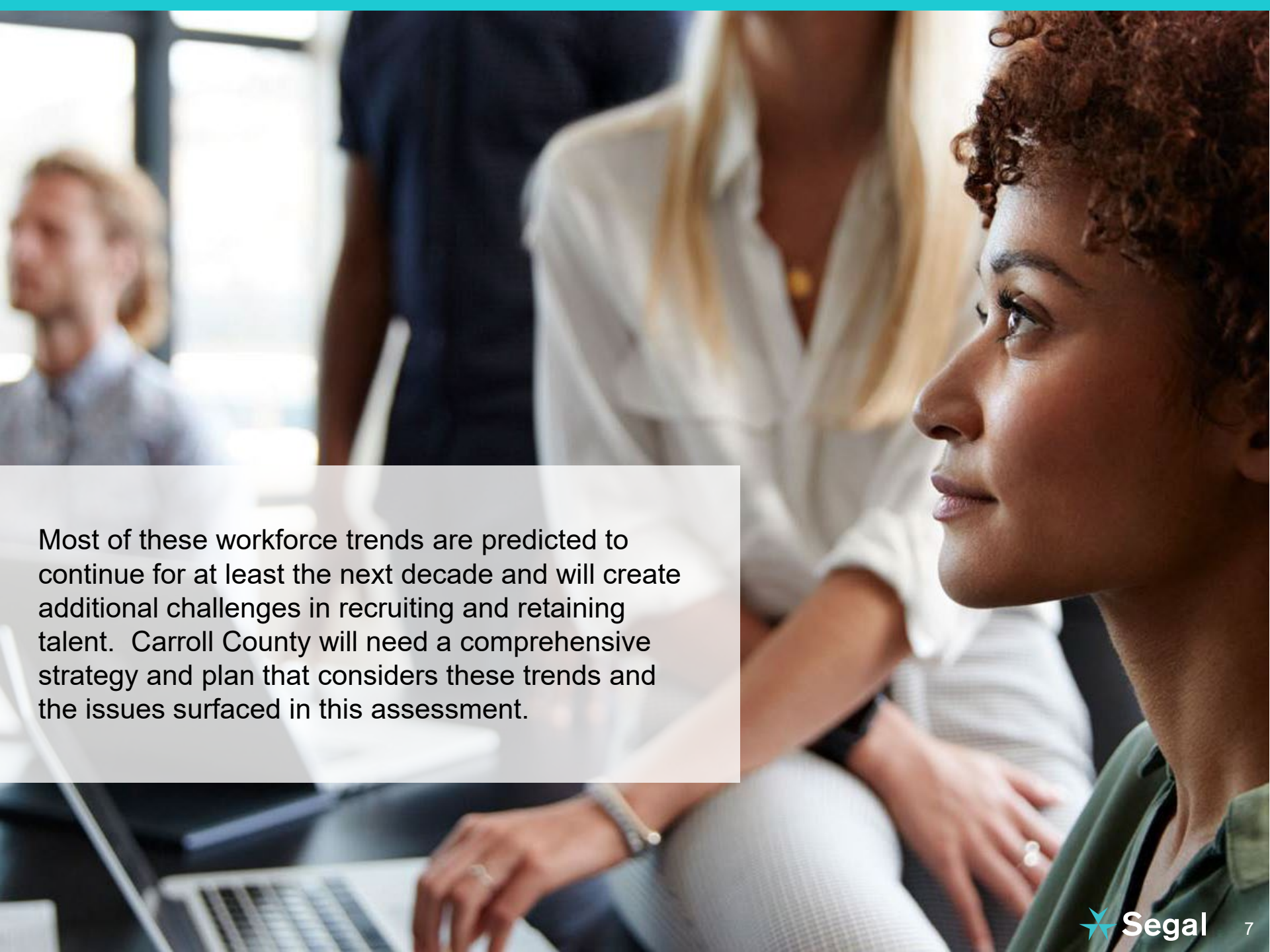
The post-pandemic era is becoming the “Big Quit”.

- In 2021, 3.5 million people on average quit their job each month:
 - This trend has increased, with a record 4.5 million resignations in November and December
 - Contributing factors include poor work culture, ineffective managers, lack of remote and flexible work options, and burnout
 - While employers have for many years had the more powerful position in the employment relationship, this power balance has shifted, putting employees in control of the employer-employee relationship
 - This trend poses significant implications for Carroll County

⁹ Department of Labor. Job Openings and Labor Turnover Survey. Published July 7, 2021

¹⁰ Owl Labs. State of Remote Work 2020 Report.



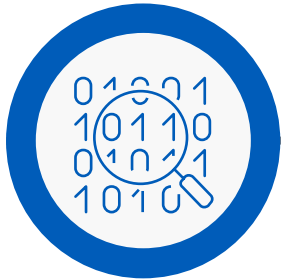
A photograph of a diverse group of professionals in an office. In the foreground, a woman with curly hair is shown in profile, looking thoughtfully to the right. Behind her, another woman with long blonde hair is also looking in the same direction. In the background, a man is visible, slightly out of focus. They appear to be in a meeting or collaborative work environment. A semi-transparent white box with black text is overlaid on the left side of the image.

Most of these workforce trends are predicted to continue for at least the next decade and will create additional challenges in recruiting and retaining talent. Carroll County will need a comprehensive strategy and plan that considers these trends and the issues surfaced in this assessment.

Assessment Findings

Methodology

Segal conducted a comprehensive organizational, operational, and workforce assessment that included the following components:



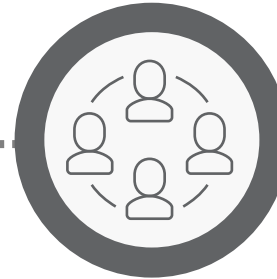
Documentation Review

A review of data and documentation provided by the County, including organizational charts, census files, retirement and turnover trends, career ladders, and succession plans (refer to the appendix for a detailed list of specific documents and data that were reviewed)



Information-Gathering Meetings and Submissions

One-on-one and focus groups interviews with 123 stakeholders including county leaders, commissioners, directors, managers, and employees across all departments, as well as 53 website submission forms



Staffing Model

Developed a staffing model to assess workforce demographics and historical turnover trends, project future succession risks across the County, and analyze potential high risk departments and roles



Leading Practices Review

Analyzing detailed findings surfaced in the interviews, we applied our knowledge and experience to craft recommendations unique to the needs of the organization and consistent with leading best practices

This report includes:

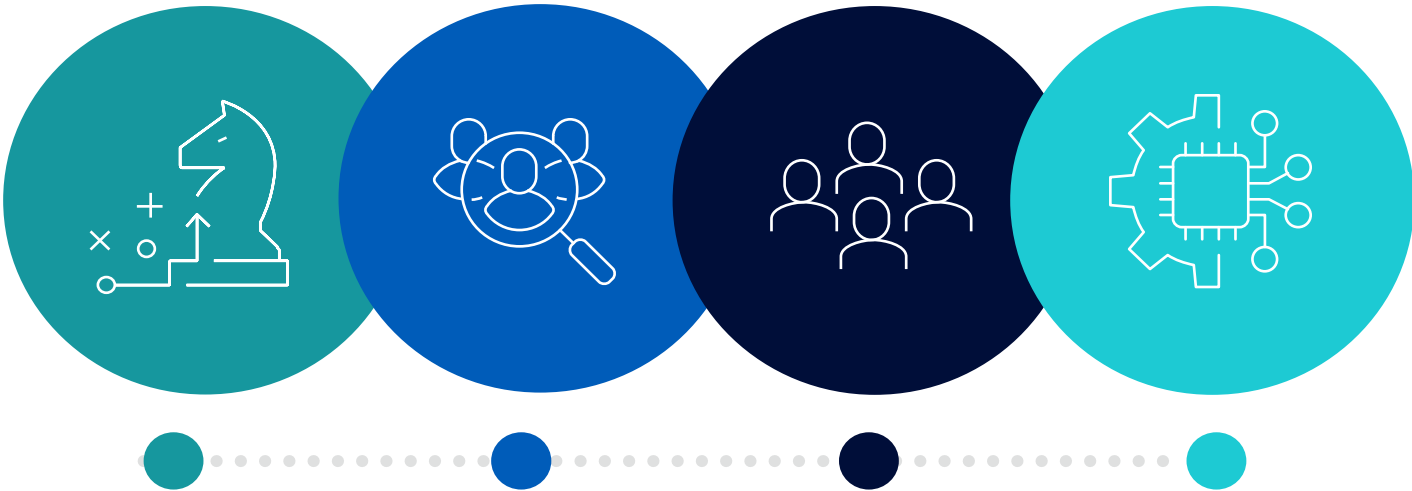
- A **comprehensive review** of common themes that emerged during the assessment
- Detailed **recommendations** to address assessment findings
- An **appendix** that includes staffing model details and documents reviewed

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- Background and Context
- Assessment Findings
- Assessment Recommendations
- Appendix

Assessment Findings

Thematic Summary



Vision and Strategy

The County does not have a clear and commonly shared vision or strategic plan to guide priorities and investments, which will be critical for making transformational changes that are needed

Workforce Challenges

The county is facing significant succession and staffing challenges, and barriers to recruiting and retaining the talent needed to sustain operations and services to constituents

Structure and Staffing

Some opportunities exist to realign structures within the county to gain efficiencies, but significant staffing and technology challenges will need to be addressed beyond restructuring

Infrastructure and Technology

Technology and systems challenges are significant barriers to organizational and operational efficiencies, and gaining greater staffing capacity

Organizational Strengths

Stakeholders identified numerous strengths relative to the organization and workforce



A dedicated, committed, and hard-working workforce



A deep sense of commitment to the County and community among the workforce



High levels of pride in serving the County



The quality of existing talent



Generous benefits package



Tuition benefits to support professional growth



Ample paid time off



Assessment Findings

Vision and Strategy



The County does not have a clear and commonly shared vision or strategic plan to guide priorities and investments, which will be critical for making transformational changes that are needed

- The current structure of Carroll County government has contributed to the lack of a clear and shared vision, competing priorities, and lack of clear leadership expectations and accountabilities across the County
 - The five-commissioner structure that turns over regularly can make it difficult to establish a shared long-term vision and gain consensus or agreement on priorities and areas of focus and investment
- Significant organizational workforce issues and challenges will likely require substantial investment, but funding streams are largely limited to tax revenues and fees, and there historically has not been a willingness or openness to raising taxes or reducing any services to constituents
 - Without identifying increased or additional revenue sources, possible changes that result from this study will likely be incremental and insufficient to address future needs
- The financial impacts of the integration of Fire and EMS are unclear and have not been fully assessed, and there is the potential for significant cost increases to the County to fully implement and sustain this plan
- The County Administrator has considerable operational responsibilities, and the lack of a Deputy Director to manage the day-to-day operations significantly limits the capacity of the County Administrator to focus on strategic initiatives, which will be critical for addressing the organizational and workforce challenges outlined in this report
- An inability to address the strategic and foundational issues referenced above will significantly limit the potential to make the transformational changes that are needed to sustain operations and the level of excellence expected by constituents



The County is facing significant barriers to recruiting and retaining talent needed to support operations and sustain the level of services to constituents

Aging Workforce

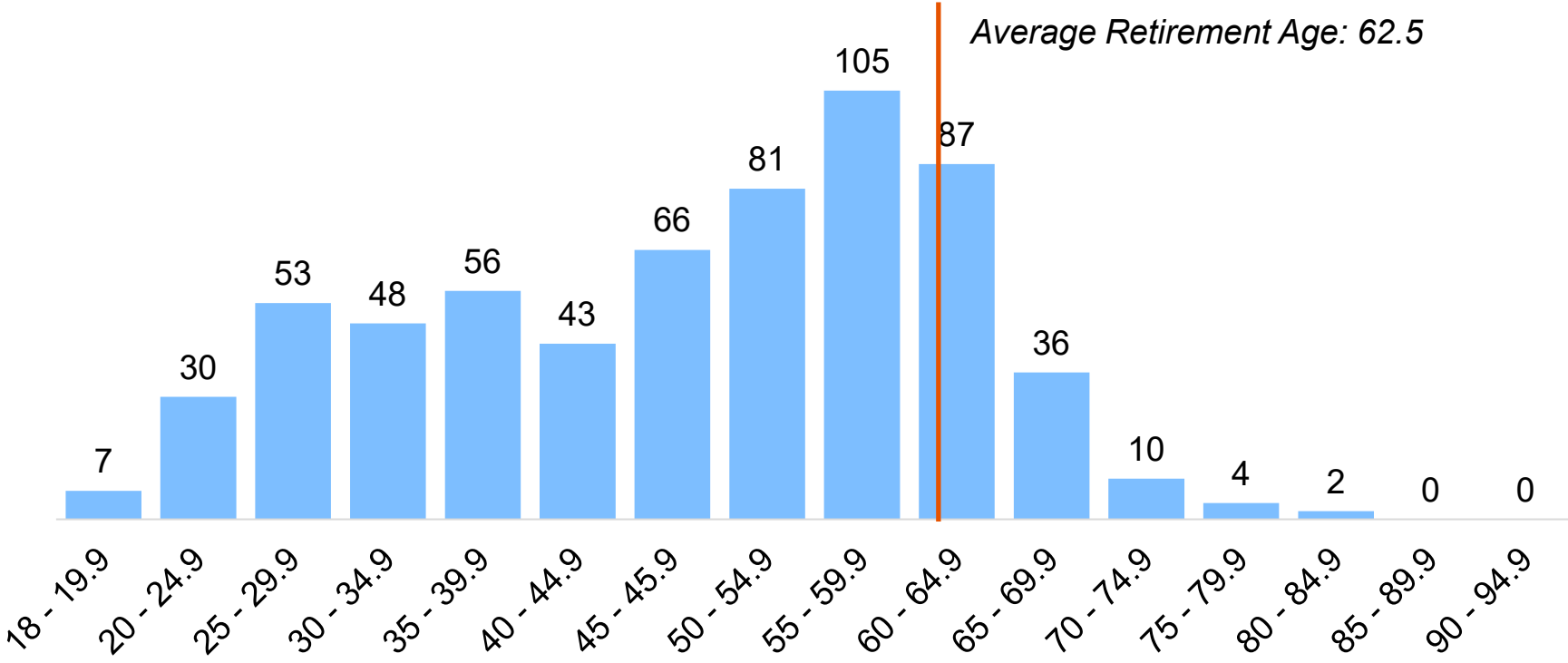
- As outlined in detail on the following pages, the County has an aging workforce and faces a significant wave of retirements over the next 5-6 years, posing substantial succession risks
- While basic succession plan forms identify general successors in departments and are sent to HR, there is no organization-wide succession plan or a framework, strategy, and approach for meaningful succession planning
- There are also not clear strategies, approaches, and mechanisms for capturing and transferring knowledge when critical roles turn over, or approaches and programs to cross-train employees and develop internal skills to support future roles
- A significant portion of the current workforce consists of long-tenured employees who have remained loyal to the County and accepted lower pay for the pension and benefits, but a significant portion will retire and these factors will likely be insufficient to attract and retain a new generation of workers

Assessment Findings

Workforce Challenges



An aging County Workforce presents significant succession and staffing risks: Current Employee Age Spread



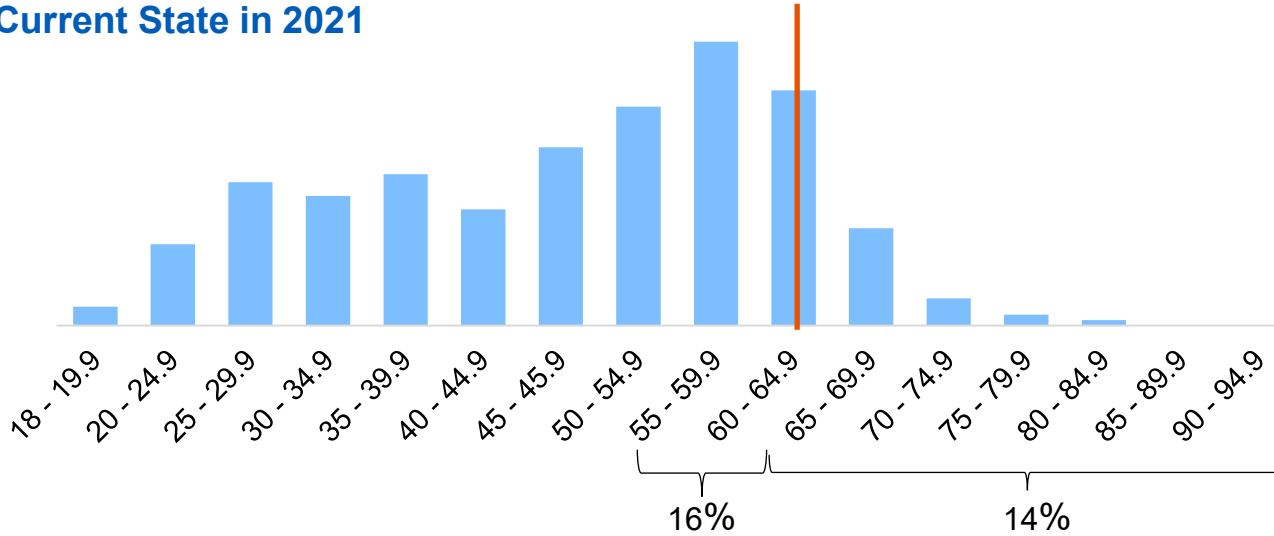
Includes full-time and part-time employees
Effective October 2021

Workforce Demographics

Workforce Challenges



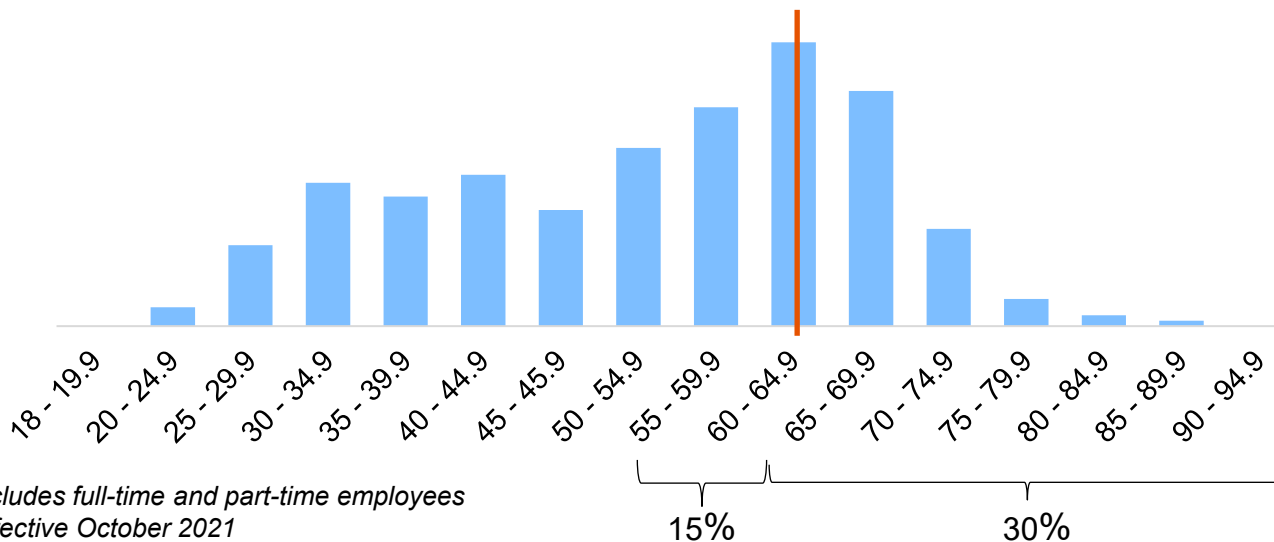
Current State in 2021



In **2021**,

- **14%** of the Carroll County workforce is at or above the average retirement age (62.5+)
- **16%** of the Carroll County workforce is within 5 years of the average retirement age (57.4 – 62.4)
- Together, **30%** of Carroll County employees are either already at or above the average retirement age or are soon approaching the average retirement age within 5 years (57.4 – 62.5+)

Future State in 2026



In **2026**,

- The percentage of Carroll County employees that are at or above the average retirement age jumps to **30%** from **14%** in 2021
- Those within 5 years of the average retirement age remains steady at **15%**
- However, when combined, **45%** of the workforce will be at or within 5 years of the average retirement age in 2026

Includes full-time and part-time employees
Effective October 2021



The County is facing significant barriers to recruiting and retaining talent needed to support operations and sustain the level of services to constituents *continued...*

Attracting and Recruiting Talent

- There are significant vacancies across the County, and a lack of competitiveness in attracting and recruiting talent is contributing to an inability to fill positions and meet basic staffing needs
- Lack of competitive compensation is identified as the most significant barrier to attracting talent
- Most areas have struggled to establish strong candidate pools and attract qualified applicants, resulting in a growing number of contracted out positions that are often at a substantially higher cost
- In addition to compensation levels, an inflexible policy environment was commonly cited as a significant barrier to attracting and recruiting talent
 - Compensation policies and practices generally are seen as having too much emphasis on budget and keeping salaries and costs low at the expense of competing for and investing in highly qualified talent
 - The practice of requiring the majority of positions to be posted at the base minimum salary in an effort to maintain fiscal responsibility was identified as an obstacle to attracting talent
 - It should be noted that this practice has been in place to avoid creating internal salary inequities and potential negative impacts to retention and morale that may result from raising salaries for new employees and not long-term employees
- The County does not have a clearly articulated employee value proposition (EVP) or employer brand to support recruiting and retention efforts
- Limited remote and flexible work options are also viewed as a substantial barrier to recruiting talent



The County is facing significant barriers to recruiting and retaining talent needed to support operations and sustain the level of services to constituents *continued...*

Turnover

- Based on historical data over the last five fiscal years, the County has experienced average turnover rates of about 10% per year, inclusive of both voluntary and involuntary turnover
 - On average, per year, the County experiences about 2% involuntary turnover and 8% voluntary turnover
 - Half of the County’s departments are experiencing higher turnover above 10% per year, including:
 - Public Works
 - Comprehensive Planning
 - Citizen Services
 - Economic Development
 - Public Safety
 - Recreation and Parks
 - Management and Budget
 - As such, the County should evaluate whether these turnover rates are rooted in some other cause and whether they may be preventable through retention strategies
 - Moreover, engaging in targeted pipeline development and recruiting strategies within these areas will be needed to proactively prepare for turnover



The County is facing significant barriers to recruiting and retaining talent needed to support operations and sustain the level of services to constituents *continued...*

Retention, Culture, and Morale

- Our assessment revealed that morale overall is low, and that levels of employee engagement are low in pockets of the County
- Compensation is considered inadequate, and there are reportedly limited rewards beyond basic pay and benefits
- Limited flexible and remote work options will likely pose a barrier to keeping talent and ensuring a highly engaged workforce
- Many employees feel unappreciated for their contributions, and there is not a robust employee recognition strategy or program in place, or dedicated funding to support such efforts
- Lack of career paths and opportunities to advance was identified as a contributing factor to low morale
- While benefits are considered strong, the shortfalls in compensation, and a declining value placed on traditional benefits and pension benefits among younger generations will likely be barriers to retaining talent going forward
- Lack of training, career development support, and opportunities for advancement pose limitations to attracting and retaining younger generations of workers
- Paid maternity and paternity leave benefits that do not negatively impact accruals and other benefits, childcare support, and other voluntary benefits will become increasingly critical to retention are lacking



The County is facing significant barriers to recruiting and retaining talent needed to support operations and sustain the level of services to constituents *continued...*

Retention, Culture, and Morale

- Segal conducted a review of the County’s Chapter 36 Personnel Policies and all other polices provided in our data and document request, and identified several areas where policies may negatively impact competitiveness in recruiting and retaining talent:
 - Limited flexibility in Chapter 36.068 in setting starting salaries to be more competitive
 - The requirement in Chapter 36.035 to pay the same salary for lateral transfers, which may limit career advancement and mobility
 - Policy #2014-HR-01, November 18, 2014 Tuition Assistance Policy, which provides a critical benefit that is a valuable retention tool but at a low reimbursement amount
 - Limited processes and mechanisms to ensure compliance with Section 36.122 (2) Annual Performance Review, which indicates supervisors shall conduct a performance review at least once per year
 - Policy 2021-HR-01, July 12, 2021 Telework Program Policy, which currently only provides for limited flexible and remote work options
 - Lack of processes and practices to regularly conduct and monitor trends from exit interviews in support of Section 36.155, Exit Interviews

Assessment Findings

Structure and Staffing



Some opportunities exist to realign structures within the county to gain efficiencies and greater integration, but significant staffing challenges will need to be addressed beyond restructuring

HR Services and Support

- HR is generally characterized as a compliance function that is rigid, risk averse, and inflexible, limiting the ability to drive strategies to address critical workforce needs
- The HR function is perceived as lacking a service-orientation and focus on people and culture
 - HR is perceived as placing too much emphasis on budget and cost savings at the expense of driving strategies and practices to recruit and retain high quality talent and support a highly engaged workforce
- As a result of the above perceptions, levels of confidence and trust in HR are low throughout the organization
- The County is facing significant workforce, organizational, and cultural challenges and impacts over the next 5-7 years, and modernizing HR services and establishing a strategic, people focused culture and approach throughout the HR function will be essential

Assessment Findings

Gaps in HR Support and Services



HR is largely transactional and consumed with compliance and administrative activities with limited strategic focus, which is not reflective of a best practice HR model

Best Practice HR Model



- Talent sourcing and pipeline development
- Workforce and Succession Planning
- Leadership Development
- Culture/Engagement/retention
- Compensation Strategy and Planning
- Diversity, equity, and inclusion
- HR Metrics and workforce analytics

- Employee Relations
- Recruiting and Selection
- Training Delivery
- Performance Management

- Payroll
- Benefits Administration
- Record Keeping
- Compliance
- HRIS

Carroll County HR Model



Little to No Focus & Capacity

Some Focus & Capacity

Predominant Focus

The current workforce challenges facing the County and significant shifts in workforce trends and needs will make it imperative for HR to offer services and programs to effectively recruit, retain, and develop talent

Assessment Findings

Structure and Staffing



Some opportunities exist to realign structures within the county to gain efficiencies and greater integration, but significant staffing challenges will need to be addressed beyond restructuring

Opportunities for Restructuring or Gaining Efficiencies

- Planning and Land and Resource Management is not integrated and could be combined into a single unit to ensure a more integrated approach for long-term planning strategy and short-term priorities and activities
- Public Works is viewed as too large and complex, which is a barrier to more efficient operations and enhanced service levels
 - Segal looked at the option of taking Facilities out of Public Works and incorporated into a stand-alone General Services unit
- Parks and Recreation and Facilities are fragmented and can be better aligned
- As the EMS model evolves, the Public Safety function can be integrated with the broader function and does not need to be a stand-alone entity going forward
- Grants Administration is highly distributed and decentralized, and there is reportedly duplication and significant inefficiencies due to the structure and inconsistent and manual processes
- Administrative support is also decentralized, and workloads and responsibilities are reportedly uneven and ripe for centralization
- GIS is decentralized and there is limited cross-training among roles, contributing to inefficiencies, backlogs, and long timelines
- *It should be noted that while these structure changes could produce minimal organizational and staffing efficiencies, we do not believe these changes will provide significant opportunities for cost reduction or transformational change*

Assessment Findings

Structure and Staffing



Some opportunities exist to realign structures within the county to gain efficiencies and greater integration, but significant staffing challenges will need to be addressed beyond restructuring *continued...*

Areas of Potential Overstaffing

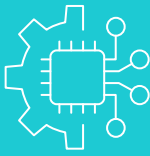
- Collections
- Administrative support roles
- *It should be noted that Segal did not identify any areas that were significantly overstaffed or provided meaningful opportunities to reduce staffing and costs*

Areas of Potential Understaffing

- Technology Services is reportedly understaffed
 - Competency and skills have also not kept pace with best practices, and the type of roles and staffing needed for the future will likely be different than current roles
- The Fire and EMS integration will result in significant staffing needs
 - Efforts are underway to hire approximately 200 employees under the County umbrella, but actual staffing requirements and resources needed to support this effort are not yet fully known
- Roads Operations
 - There are currently 17 or more open positions, and this unit has reportedly been understaffed for many years
- Facilities and Maintenance

Assessment Findings

Infrastructure and Technology

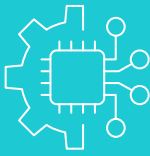


Technology and systems challenges and limitations are a significant barrier to organizational and operational efficiencies and gaining organizational staffing capacity

- Dated systems and technology platforms are an impediment to gaining operational efficiencies, and are limiting organizational capacity and opportunities to restructure and streamline staffing
 - Antiquated technology and platforms require manual, paper-based processes and work, which requires higher staffing levels to support cumbersome and manual workflows and transactions
 - This factor makes it difficult to recommend significant staffing and organizational changes at the present time or identify meaningful opportunities to streamline roles without addressing this underlying issue
 - Lack of systems and automation make it difficult to establish standardized processes, practices, and workflows across the county
 - Grants administration was identified as an area plagued by manual work, administrative burdens, and inefficient practices and workflows across the County
 - Grants administration lacks technology to track, manage, and administer grants, resulting in significant time spent on manual work and tracking
- Process efficiencies and automation may reduce or eliminate the need for more staffing
 - A detailed mapping and review of permits processes is needed to reduce timelines and determine if efficiencies can be gained or if additional staffing is needed
 - Collections relies on manual, paper-based processes and does not have a modern collections system to support more efficient processes
- *Based on these factors outlined above, it is not possible for Segal to recommend organizational restructuring or reduction in staffing without first addressing these underlying inefficiencies*

Assessment Findings

Infrastructure and Technology



Technology and systems challenges and limitations are a significant barrier to organizational and operational efficiencies and gaining organizational staffing capacity *continued...*

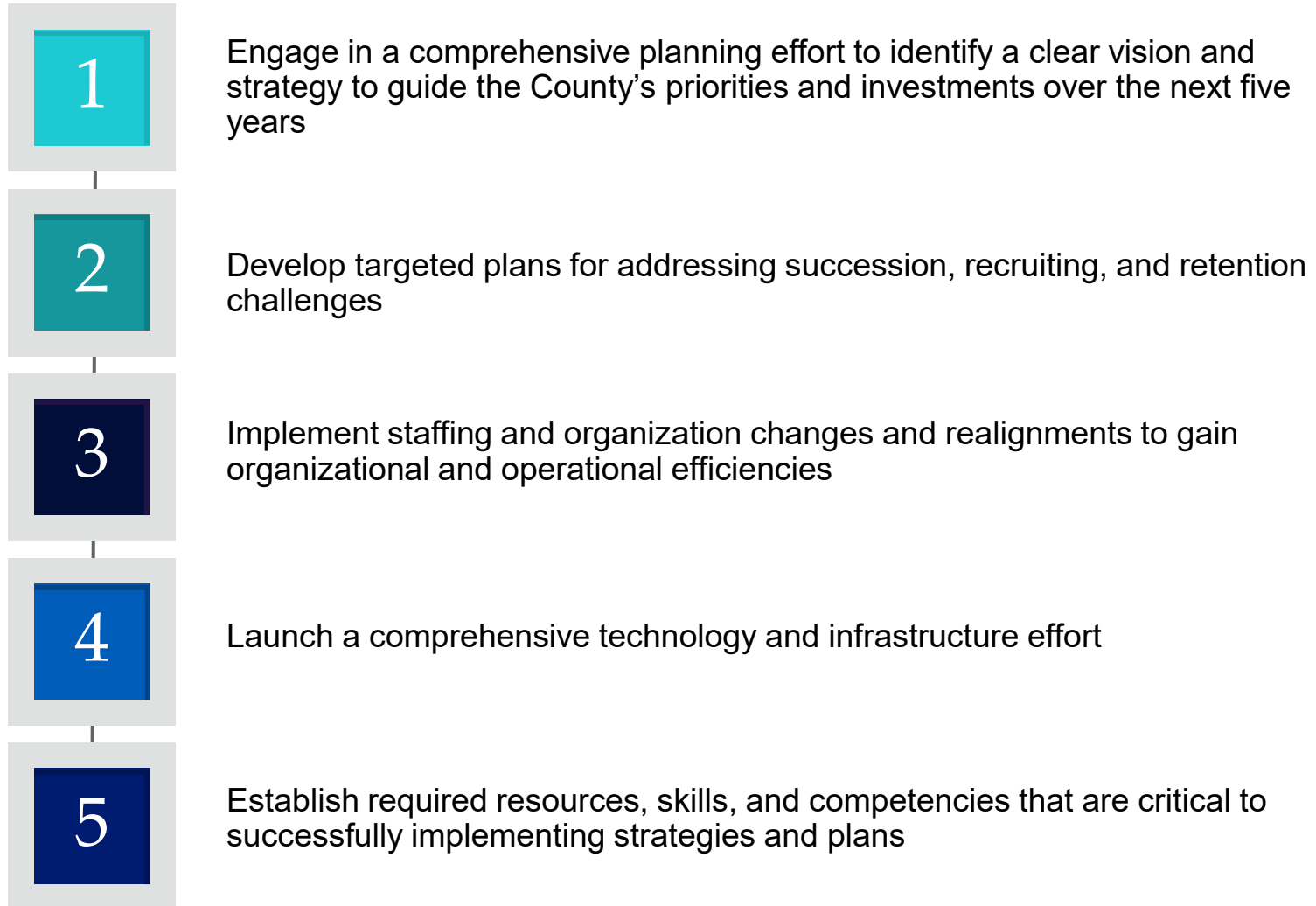
- Document management and shared sites/files are lacking, resulting in significant manual work and preventing visibility and clarity of workflows and processes across the County
- Heavy reliance on individually created spreadsheets to manage processes results in inconsistent processes, practices, and potential security risks
- Technology Services is perceived as being understaffed, overwhelmed, and reactive, limiting the ability to be proactive and address broader significant technology priorities and needs
 - Technology priorities and investments are not aligned to County needs, and the IT team is not proactive in bringing solutions that will enable efficiencies and improved processes throughout the County
- There are significant technology and system needs across the County, but there is not a clear governance structure or process for identifying priorities and informing technology investments
 - There is no long-term IT strategic plan
 - Technology and systems priorities to guide investments and initiatives are unclear
- Technology services staff are also widely perceived as lacking the full range of skills and competencies needed to support a modern IT environment and support new technology solutions and systems
- When limited technology upgrades or improvements are undertaken, efforts reportedly take too long (in many cases several years), leading to frustration and a lack of confidence in Technology Services
- Technology training is limited across the County

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- Background and Context
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- Assessment Recommendations
- Appendix

Assessment Recommendations

Summary Overview



Assessment Recommendations

Establish the Future Vision and Strategy



Engage in a comprehensive planning effort to identify a clear vision and strategy to guide the County's priorities and investments

- Establish a clear vision and strategic plan for the County that will serve as the foundation for future priorities and investments
 - Engage the 5 Commissioners and County Directors in identifying the vision and strategic priorities
 - Identify key imperatives and objectives for achieving the vision and plan
 - Develop specific strategies and action items to achieve the strategic plan and vision and address the organizational and workforce recommendations in the strategic plan
 - Incorporate a detailed costing analysis, including outsourcing analysis, to support the Fire/EMS integration
- Establish an implementation plan with timelines and key milestones
- Establish a funding plan to support implementation of the strategic plan
- Identify a process and approach among the Commissioners and County leaders for engaging in annual planning and prioritization
- Establish a new Deputy Director role reporting to the County Administrator to reduce day to day operational tasks and activities of the Administrator and provide the incumbent with sufficient capacity to focus on strategic leadership and priorities

Assessment Recommendations

Address Workforce Challenges



Develop targeted plans for addressing succession, recruiting and retention challenges

- Develop a comprehensive talent strategy and plan to address workforce challenges and needs

Succession Planning

- In order to proactively prepare for the anticipated wave of retirements, establish a framework and process for succession planning at all levels of the County
- Adopt a formal succession planning model utilizing the 9-box grid model (*details included in the appendix*)
- Design a training program to educate leaders, managers, and employees on succession planning framework and approach
- Engage in a comprehensive effort to modernize job descriptions at all levels of the County
 - Identify useable tools, templates, and capabilities of the HR system related to job descriptions and integrate into effort to revise job descriptions
- Identify resources and establish targeted programs to develop and prepare successors
 - Revise performance management approaches to enhance feedback mechanisms for managers and leaders
 - Design formal mentoring/shadowing/job rotation programs for key leadership roles
 - Develop a robust leadership development program for senior leaders and for mid-level managers

Assessment Recommendations

Address Workforce Challenges



Knowledge Transfer

- Develop a formal approach for knowledge transfer for successors in leadership roles and critical/hard to fill roles, employing these recommended steps:
 - Creating a process and tool for conducting an inventory of critical skills, competencies, and required experience for roles
 - Designing strategies and programs to support the transfer of critical skills and knowledge to successors, which may include:
 - Mentoring, shadowing, and apprentice programs
 - Guided experience program that features those with first-hand knowledge providing hands-on training to successor
 - Employing cross-training process and program
 - Identifying tools and technology to house inventory and monitor and track skills needs and gaps on an ongoing basis
 - Defining clear metrics to benchmark progress and success
 - Aligning knowledge transfer efforts and priorities with the impacts of any potential turnover

Assessment Recommendations

Address Workforce Challenges



Training and Development

- While the strategic workforce planning effort has surfaced core competency and skill needs and gaps, Carroll County should adopt a longer-term formal process and approach for assessing training needs and for competency management
- Segal recommends the following to address critical workforce needs:
 - Conduct a targeted training needs survey to inform program changes
 - Design a training and development strategy and plan for the next five years
 - Revise existing training programs and expand offerings to support needs and priorities
 - Utilize a balance of internal resources and use of external vendor resources to delivery training programs
- Consistent with best practices, ensure the following in the training strategy and plan:
 - Specific programs organized by career paths and aligned to competency requirements
 - Utilization of a variety of training methods and modalities to accommodate diversity in learning preferences and needs
- Identify formal measurements to gauge training quality and learning outcomes
- Segal recommends the County also develop and implement the following measures:
 - Develop and define core organizational competencies consistent with updated job descriptions
 - Develop competency models and profiles for major roles/positions
 - Adopt a formal competency library to assist with competency management
 - Creating a competency assessment approach and supporting tool to conduct individual competency assessments

Assessment Recommendations

Address Workforce Challenges



Recruiting Strategy

- The County must develop a recruiting strategy and plan to fill roles that internal succession cannot accommodate and to improve the ability to attract quality candidates
- Segal advises the recruiting strategy include the following components:
 - A plan to proactively establish talent pipelines for hard to fill roles (i.e., skilled trades)
 - Formal outreach and partnership with area high schools and vocational programs
 - A plan that leverages Workforce Development and Continuing Education programs within Carroll County Community College as a potential source for talent
 - Creation of internship and apprentice programs that provide training and licensing for talent pools that may not have the full range of qualifications
 - Upskilling and certification support will be particularly critical for recruiting roles in the skilled trades
 - Networking and educational events and activities within the local community to showcase Carroll County as an employer
 - Targeted job fairs, outreach campaigns, and skill development and apprenticeship programs to develop candidate pipelines for these difficult to fill skilled trades roles
 - Social media recruiting strategy and promotion of employer brand (LinkedIn, Glassdoor, etc.)
 - A formal employee referral program that compensates existing employees for identifying and recommending new hires

Assessment Recommendations

Address Workforce Challenges



Recruiting Strategy

- Establishing a clear and compelling Employee Value Proposition (EVP) for the County will be critical to the ability to successfully manage succession risks and recruit and retain talent going forward
- The EVP will be foundational to future workforce efforts, and a formalized effort to develop and craft the County's EVP should be a high priority
- Segal recommends the following steps for developing the EVP
 - Conduct a series focus groups among staff to define what is valued from an employment perspective and what should be included as part of the EVP
 - Utilizing the data points above, craft a compelling EVP statement and definition for Carroll County
- Based on best practices of employers with leading EVPs, focus and investment in the following areas will be particularly critical:
 - Effective senior management leadership and supervision
 - Fair and consistent policies
 - Remote and flexible work options
 - Connection to the mission and work of the County
 - Career development programs
 - Investment and efforts on training and development, wellness, and work/life balance
 - Expanded recognition programs for all employees
 - Competitiveness and fairness in compensation
 - Expanded voluntary benefits

Assessment Recommendations

Address Workforce Challenges



Recruiting Strategy

- Once the EVP is defined, charge HR and communication resources with developing a compelling employer branding strategy and campaign
 - Incorporate employer brand in recruiting materials, web presence, and social media presence
 - Create a strategy and implementation plan for ensuring the employee value proposition is consistent through all parts of the organization and during the recruiting experience
- In addition to creating an employee value proposition, launch a formal employer of choice initiative to bolster recruiting efforts

Assessment Recommendations

Address Workforce Challenges



Culture and Retention

In order to address issues of culture and morale, attract and retain a new generation of workers, and ensure a highly engaged and productive workforce, a comprehensive culture and retention strategy is needed

Compensation

- Address compensation issues detailed in the upcoming formal compensation analysis
- Following the compensation study, the future strategy should consider:
 - A future compensation strategy and philosophy
 - Plans for addressing market competitiveness
 - Any pay equity or salary compression issues that may exist
 - Incentives and rewards to enable retention strategies
 - Establishing a comprehensive communication and change management strategy to support changes in compensation and total rewards

Assessment Recommendations

Address Workforce Challenges



Culture and Retention

Employee Engagement

- Conduct an employee engagement survey to establish a baseline of the current work culture and climate
 - Utilize a third party vendor to ensure credibility and confidentiality
 - Develop a framework and approach for action planning and addressing engagement survey outcomes across the County
 - Establish a regular schedule to survey and assess culture and engagement
- Consistent with Section 36.155, Exit Interviews, of the Personnel Policies, utilize exit interviews to monitor trends driving turnover and culture and morale issues
 - Broadly and regularly communicate the option to participate in an exit interview
 - Ensure effective HR processes and tools for collating exit interview input, monitoring trends and themes, and providing training and other proactive measures to address issues contributing to turnover

Assessment Recommendations

Address Workforce Challenges



Culture and Retention

Total Rewards

- Reevaluate current benefits and expand offerings to include options to appeal to younger generations of workers and consistent with best practices in recruiting and retention:
 - Voluntary benefits
 - Flexible work
 - Paid maternity and paternity leave beyond Short Term Disability and FMLA obligations
 - Paid adoption leave
 - Child care supplement or partnership with discounted rates for partner child care centers
 - Expanded tuition benefits
 - Wellness and wellbeing programs
 - Recognition programs
 - Stress reduction and mental health programs
 - Financial management and planning support and resources
 - Professional and career development programs
 - Mentoring Programs

Assessment Recommendations

Address Workforce Challenges



Culture and Retention

Remote and Flexible Work

- Develop a remote/hybrid and flexible work strategy and program
 - Create and conduct a survey of remote/hybrid work preferences among current employees
 - Design program components and parameters (i.e. what roles qualify for remote/hybrid work, geographic limitations of program, onsite requirements for remote workers, minimum and maximum number of days for remote/hybrid work, etc.)
 - Create supporting guidelines
 - Revise structures, roles, and policies as needed
 - Develop training program to support managing and working in a remote/hybrid environment
 - In addition to remote work options, establish a flexible work program with supporting guidelines and policies to provide options and a sense of equity to those roles that are not conducive to remote/hybrid work
 - This may include flex schedules, 4/10 shifts, job sharing, etc.
- Address Workers Compensation coverage for PA employees
 - Consider obtaining Worker’s Compensation coverage by purchasing a policy from a broker, private carrier, or the Pennsylvania State Worker’s Insurance Fund (SWIF) or apply for approval to maintain self-insurance status to include employees that work remotely from Pennsylvania
 - The complexities of expanding coverage into PA and ensuring compliance may require additional resources and potentially a dedicated person to manage and support PA workers

Assessment Recommendations

Address Workforce Challenges



Culture and Retention

Career Development

- Develop clear career paths and ladders
 - Incorporate mentoring and rotational programs to provide varied employee experiences to accommodate the lack of opportunities for upward mobility
 - Identify opportunities to provide career advancement for employees outside of their current department to retain staff within the County
- Bolster performance management program and processes:
 - Revise, simplify, and document the performance management process for all levels within the organization
 - Consistent with Section 36.122 (2) of Chapter 36 Personnel Policies, ensure effective processes to monitor and ensure completion of performance evaluations
 - Incorporate regular informal check-in and feedback sessions to promote more regular performance feedback
 - Bolster training for managers on how to effectively conduct the performance management process and provide feedback on performance throughout the year

Assessment Recommendations

Address Workforce Challenges-Areas of focus for the EVP



Policy Changes to Bolster Recruiting and Retention

- In support of developing a strong EVP and improving competitiveness for recruiting and retention, modify critical policies and practices as follows:
 - Modify Section 36.068 of the Personnel Policies, Entrance Pay Rate, to allow for greater flexibility in setting compensation above 5% where appropriate
 - Lessen the emphasis on establishing job postings and beginning salary at the lowest end of the base to reduce budget impacts, and adopt more flexible compensation practices based on the role and market conditions
 - Amend Section 36.069(A) of the Personnel Policies, Other Salary Adjustments, to allow for flexibility in providing a salary increase, where appropriate, for employees that transfer from one position to another within the same pay grade in order to support expanded career development and retention objectives
 - Potential impacts on internal pay equity and compression should be considered as part any changes to pay policies and practices for new positions and lateral transfers
 - Update policy #2014-HR-01, November 18, 2014 Tuition Assistance Policy, to provide for incremental increases in funding for tuition benefits to increase competitiveness
 - Revise Policy 2021-HR-01, July 12, 2021 Telework Program Policy to accommodate a modern remote/hybrid work program, as well as flexible schedule options (operation needs permitting)
- Leverage the exit interview process to support retention efforts consistent with Section 36.153 of the Personnel Policies
- Revise paid maternity and paternity leave benefits to provide paid leave without negative impact on accruals and other benefits
- *See summary guide on the following page for a list of recommended formal policy changes and whether changes require amendment to Chapter 36 Personnel Policies*

Assessment Recommendations

Address Workforce Challenges-Policy Changes



Below is a summary guide for recommended policy changes and required steps:

Recommended Policy Change

- Lessen the emphasis on establishing job posting and beginning salary at the lowest end of the base to reduce budget impacts and adopt more flexible practices of setting compensation at the appropriate level based on the role and market conditions
- Modify Section 36.068 of the Personnel Policies, Entrance Pay Rate, to allow for greater flexibility in setting compensation above 5%
- Amend Section 36.069(A) of the Personnel Policies, Other Salary Adjustments, to allow for flexibility in providing a salary increase for employees that transfer from one position to another within the same pay grade
- Update policy #2014-HR-01, November 18, 2014 Tuition Assistance Policy, to provide for incremental increases in funding for tuition benefits to increase competitiveness
- Revise Policy #2021-HR-01, July 12, 2021 Telework Program Policy to accommodate a modern remote/hybrid work program, as well as flexible schedule options (operation needs permitting)

Requirement of Formal Amendment to Chapter 36: Personnel Policies

- No: requires change to internal County practices
- Yes: **Amend Section 36.068** to raise the 5% minimum and/or provide for the ability to set a higher compensation level without Commissioner approval
- Yes: **Amend Section 36.069(A)** to allow for appropriate salary increases for transfers within the same salary grade
- No: **modify HR Tuition Assistance Policy (#2014-HR-01)** to reflect incremental increases in funding
- No: **modify HR Telework Program Policy (#2021-HR-01)** to expand program parameters and options

Assessment Recommendations

Staffing and Organizational Changes



Implement staffing and organization changes and realignments to gain organizational and operational efficiencies

Staffing Needs and Priorities

- The following roles and positions should be considered priorities for short term staffing needs:
 - Deputy Director for the County Administrator
 - Roads staff
 - Priority should be given to filling existing vacancies
 - Identify short-term strategies to address pay and other offerings to make roles competitive with the private sector
- Additional staffing priorities include the functions below, but Segal recommends completing the process mapping and redesign and competency/skill assessments outlined in these recommendations for the following areas before finalizing individual staffing additions:
 - Technology Services
 - HR resources to support workforce efforts and needs
 - Grants Management
 - Segal also designed a comprehensive **Staffing Model** that will allow the County to analyze and predict turnover and future staffing needs across the County (*see Appendix for details on the Staffing Model and how it will support future staffing planning and decisions*)

Assessment Recommendations

Staffing and Organizational Changes



Organizational Restructuring and Alignment

- There are several opportunities for reorganization or realignment to improve efficiencies, coordination, and collaboration
 - Consider merging Planning and Land and Resource Management
 - This merger will allow for greater alignment and integration of these units, but will not result in significant staffing or cost efficiencies
 - The benefits of aligning the units should be balanced with the cultural resistance and impacts that will likely result
 - Restructure Public Works to reduce the size and complexity and improve communication and coordination
 - In particular, consider transitioning Facilities out of Public Works
 - Options include returning to a General Services unit
 - While there may be some opportunities to streamline staffing among management roles, Segal does not believe this restructuring will result in significant staffing efficiencies based on current lean staffing levels and future retirement and turnover projections for this area
 - Revise the grants management structure and consider a more centralized model once process and work flow issues are addressed
 - Streamline administrative support roles by creating a pool where specialized embedded administrative support is not critical
 - The job description and duties for these roles should first be updated and revised to reflect modern operational needs
 - Consider a centralized GIS function that incorporates a comprehensive cross-training plan and approach to gain efficiencies

Assessment Recommendations

Staffing and Organizational Changes



Potential Outsourcing Opportunities

- Conduct a comprehensive analysis of potential outsourcing options or solutions for portions of Fire EMS
 - *Note that based on the limited information currently available on the detailed financial impacts of the Fire EMS integration, Segal cannot make a conclusive determination of whether outsourcing will result in cost reduction or efficiencies at this stage, but suggests doing a complete analysis once the implementation and costing details are fully understood*

Assessment Recommendations

Staffing and Organizational Changes



Process Redesign and Automation

- Segal recommends that the County engage in the process mapping and redesign effort **prior** to making determinations on organizational realignment and outsourcing
 - Process and workflow inefficiencies and manual work are likely resulting in higher levels of staffing than might otherwise be needed, and this work will inform where outsourcing may be most cost effective, and confirm appropriate staffing levels if additional organizational capacity can be created
 - In particular, reassess staffing needs for administrative support roles and for grants administration once processes are streamlined and automated
- Commission a formal effort to map, reengineer, and automate core processes to gain organizational efficiencies and streamline staffing levels
 - Utilize cross-functional working groups of subject matter experts to map and formally document and standardize processes and procedures
 - Map processes and workflows using swim lane methodology
 - Identify opportunities to eliminate unnecessary steps and activities and reduce layers of review
 - Formally document processes including anticipated timelines for expected turnaround
 - Identify opportunities to automate processes with existing or new technology

Assessment Recommendations

Staffing and Organizational Changes



Process Redesign and Automation

- Priority processes to be mapped and redesigned include:
 - Grants management
 - Administrative support processes
 - Permits
 - Recruiting and hiring
 - Classification and promotion
 - Finance and accounting
- *Once mapping and redesign of workflows and processes are complete and automation solutions are in place, determine where staffing levels can be lowered and/or where reorganization or centralization of services is possible*

Assessment Recommendations

Technology and Infrastructure



Launch a comprehensive technology and infrastructure effort

IT Governance and Strategic Plan

- Develop and deploy an effective IT Governance model
 - Create a technology strategic plan including a roadmap for all IT investments
 - Establish definitive and enforceable standards for the procurement, deployment, and management of all IT systems and applications
 - Develop comprehensive data security protocols, policies, and procedures
 - Assess technology related training needs and develop an effective IT training program
 - Identify redundant and duplicative systems and technologies
 - Develop an immediate plan to integrate systems and reduce multiple platforms for common applications

Critical areas of technology needs and upgrades or automation

- Document management and DocuSign options
- Grants management and accounting system and automated process
- Online collections system
- Full implementation of new HR system
- Systems that use outdated programming languages such as COBOL or DOS

Assessment Recommendations

Resources, Skills, and Competencies



Establish required resources, skills, and competencies that are critical to successfully implement strategies and plans

Funding and Investment

- In order to make necessary changes and successfully implement the recommendations outlined in this report, appropriate funding must be identified to support needed investments
- Segal recommends developing a comprehensive funding plan that identifies clear funding sources and prioritizes investments that are needed
- This formalized commitment to funding these initiatives and making necessary investments will be critical to addressing the challenges and needs outlined in this report

Assessment Recommendations

Resources, Skills, and Competencies



Roles, Skills, and Competencies

- HR and IT will play a critical role in enabling effective implementation of recommendations and support future plans
- Both organizations will require a transformation and expanded skills and capabilities to support organizational and workforce needs
- Segal recommends conducting a comprehensive competency and skill assessment of each individual role in HR and IT to determine critical skills gaps and inform future roles, staffing, and training needs
 - Establish an assessment tool that includes core competencies for each area, and critical technical competencies required
 - Utilize the tool to gather employee and supervisor input for each role
 - Determine critical skill gaps
 - Confirm future roles and organizational structure
 - Establish a staffing and training plan based on skill gaps

Assessment Recommendations

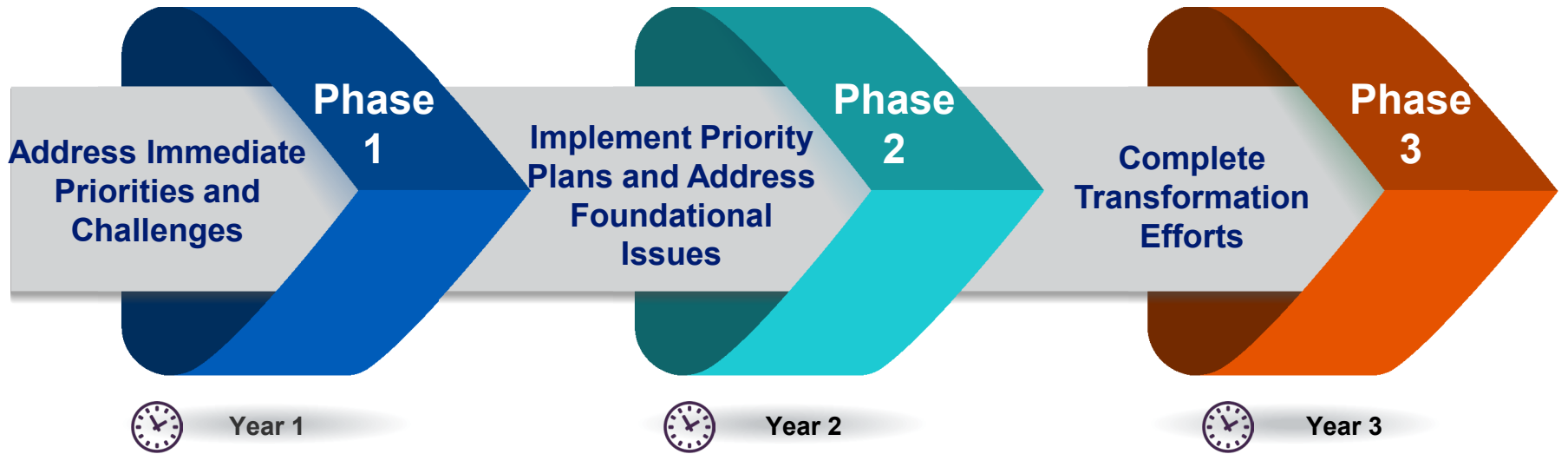
Resources, Skills, and Competencies



Roles, Skills, and Competencies

- Future HR capabilities will need to support a broad range of strategic HR services
- Potential future HR roles may include:
 - Elevated strategic HR leader/Chief Human Resources Officer (CHRO)
 - Senior level Talent Acquisition role and supporting resources/staff
 - Senior level Organizational Development role
 - Senior level total rewards leader
 - Employee and labor relations role
 - Training coordinator
- Confirm IT roles needed to support modern systems and future capabilities following competency assessment

Draft Recommended Path Forward



- Share report with Commissioners
- Develop and launch strategic planning effort
- Secure funding for and address short term staffing needs/hires
- Convene team to develop succession planning approach and process
- Create approach and tools for competency assessments (HR and IT)
- Develop remote and flexible work program
- Launch IT strategic planning effort
- Complete cost and outsourcing analysis for Fire/EMS
- Launch HR Transformation/redesign
- Complete compensation and classification study and secure funding as needed
- Launch process mapping and redesign effort
- Expand total rewards and benefits
- Develop strategic recruiting plan

- Begin to implement succession plan
- Conduct training needs assessment
- Implement remote and flexible work program
- Define the EVP and employer brand
- Begin to expand training programs and offerings
- Launch effort and tools to revise job descriptions
- Begin policy assessment and redesign effort
- Once process redesign is complete, finalize staffing and organizational restructuring
- Develop framework and plan for career paths and career development
- Begin to automate processes and implement new systems/technology
- Expand revenue generation efforts
- Expand HR and IT staff/roles to support changes

- Fully implement succession planning and knowledge transfer plans and tools
- Complete implementation of new systems/technology
- Complete total rewards and benefits additions
- Complete and launch leadership development programs
- Continue change management efforts

Report Organization

- Background and Context
- Assessment Findings
- Assessment Recommendations
- Appendix

Assessment Details

Data and Documents

- As part of the Assessment, Segal collected and reviewed the following documents and data items and incorporated relevant conclusions in this report:

| |
|---|
| Adopted Operating Plan (FY 22) |
| Annual Employee Evaluation Form |
| Annual Supervisor Professional Evaluation Form |
| Authorized Position List |
| Career Ladders (37 positions) |
| Carroll County Budget |
| Carroll County Organizational Chart (FY 21) |
| Carroll County Organizational Chart by Department |
| Census Data (October 20201) |
| Census Data (First and last days of fiscal years 2017 – 2021) |
| Commissioner Employee Turnover (FY 95 - FY 21) |
| DPW Org Chart |
| Employee Termination Process Tracking |
| FY 22 Rosters |
| HR Policies - Affirmative Action |
| HR Policies - Catastrophic Extended Family Sick Leave Policy |
| HR Policies - Chapter 36 |
| HR Policies - Contingent Employment |
| HR Policies - COVID Pandemic Addendum |
| HR Policies - Criminal Background Check |
| HR Policies - Drug Free Workplace |

Assessment Details

Data and Documents

- As part of the Assessment, Segal collected and reviewed the following documents and data items and incorporated relevant conclusions in this report:

HR Policies - Employees on Active Military Duty

HR Policies - Employment of Relatives

HR Policies - Equal Employment Opportunity

HR Policies - Family Medical Leave Act (FMLA)

HR Policies - Family Sick and Safe Leave

HR Policies - Flu-COVID Pandemic

HR Policies - Flu-COVID Pandemic Addendum

HR Policies - Group Health Care Insurance Benefits for Retirees

HR Policies - Harassment and Workplace Bullying

HR Policies - HR Compensation Adjustment

HR Policies - Leave Use During Emergency Conditions

HR Policies - No Smoking and Tobacco Use

HR Policies - Personal Social Media

HR Policies - Revised Short Term Disability (February 2021)

HR Policies - Sexual Harassment

HR Policies - Short-term Disability Benefit

HR Policies - Sick and Safe Leave

HR Policies - Telework Program

HR Policies - Tuition Assistance Program

HR Policies - Violence in the Workplace

Assessment Details

Data and Documents

- As part of the Assessment, Segal collected and reviewed the following documents and data items and incorporated relevant conclusions in this report:

Job Descriptions (All Departments)

Master Adopted Operating Plan (FY 22)

New Position Requests

Official Statement Disclosure

Pay Scales (FY 22)

Performance Standards Worksheet (Non-Supervisor)

Performance Standards Worksheet (Supervisor)

Retirement Data

Succession Plans (16)

Supervisory Report (September 2021)

Technology (FY 22)

Vacancy Position List

Succession Planning

Framework

Succession Planning

- Adopt a formal succession planning model utilizing the 9-box grid model
 - Outlined on the following page, the vertical columns of the grid indicate growth potential, and the horizontal rows identify whether the employee is currently below, meeting, or exceeding performance expectations
 - The intersection of the two determines the employee's current standing and where development may be needed
 - The 9-box grid is most commonly used in succession planning as a method of evaluating an organization's current talent and identifying potential leaders
 - When leadership performance and potential are assessed and plotted on the graph, individuals in the upper right quadrant (Box 1) are identified as high-potential candidates for succession, while those in the lower left quadrant (Box 9) may need to be reassigned or removed from the organization
 - The boxes on the grid indicate where investment needs to be made to develop future leaders (those in box 1 should be ready for top leadership within 6 months to a year; those in boxes 2, 3, or 6 have a longer timeline but can be groomed for eventual movement to box 1)

Succession Planning

Framework

A nine-box assessment tool evaluates an employee's current and potential contributions to an organization.



Succession Planning

Framework

Sample Depth Charts

| | | | | | |
|---------------------|--|--|--|--|--|
| Title Incumbent | | | | | |
| Emergency Placement | | | | | |
| Ready Now | | | | | |
| Ready in 1-2 years | | | | | |
| Ready in 2-5 years | | | | | |

Appendix

Staffing Model Details

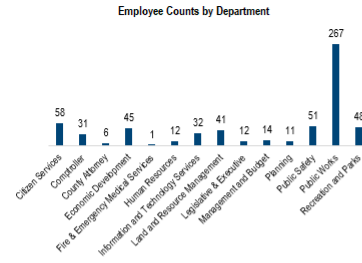
Dashboard

- Demographics: Presents a dynamic snapshot of the Carroll County Government current workforce including headcount by department, race, gender, and employee status

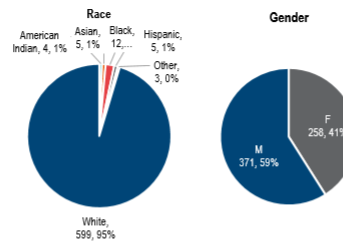
- Turnover: Displays historical turnover and retirement trends between 2017 – 2021 by turnover type, reason codes, and the ability to toggle between years and include or exclude grant employees. This section also projects future cumulative turnover

- Retirement Forecasts: Projects employee age spread, retirement risks, and years of service, over the next 5 years with an ability to toggle between departments and include or exclude PT employees

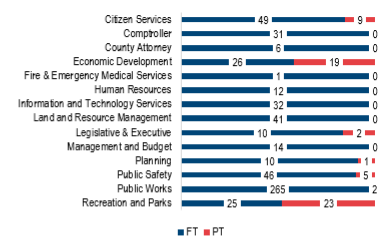
Workforce Demographics and Trends



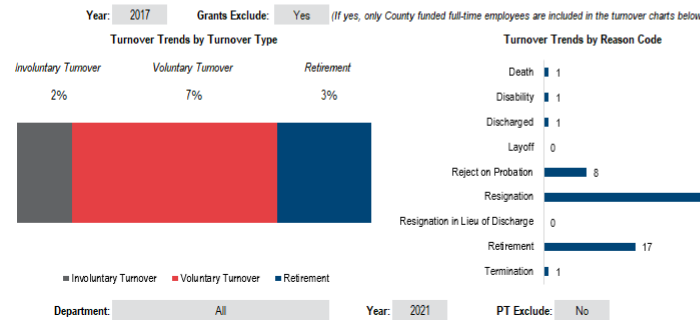
Workforce Diversity



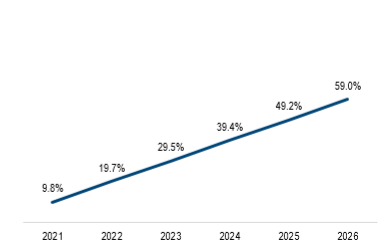
Employee Status by Department



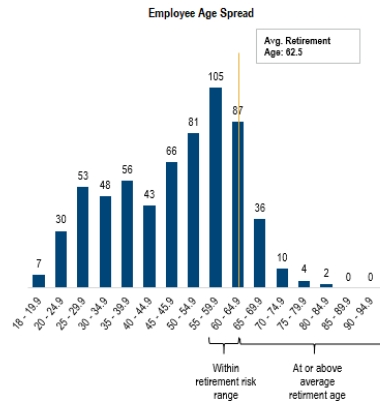
Turnover Historical Analysis and Projections



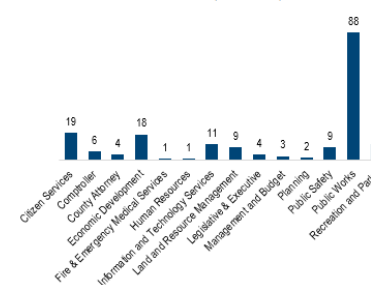
Cumulative Turnover Projections



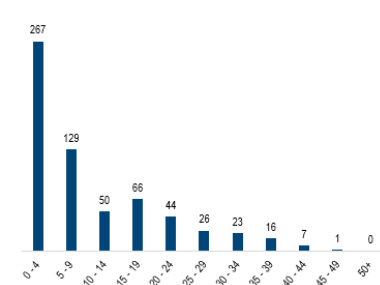
Workforce Retirement Forecasts



Retirement Risks (Combination)



Years of Service



Appendix

Staffing Model Details

Workforce Details

- Provides the ability to cut the census data based on a series of categories including department, bureau/agency, work unit, employee status, and retirement category
 - The Retirement Category slicer sorts the employee census based on three (3) pre-set categories of risk: At or Above Retirement Age, Below Retirement Risk and Age, or Within Retirement Risk Range
- The combined features permit the Model user to adjust each slicer to examine, for example, the relative retirement risk of Full-Time Regular employees within the Transportation Bureau in the Department of Public Works who are either At or Above Retirement Age or Within Retirement Risk Range

Workforce Details

The screenshot displays the 'Workforce Details' interface with five slicers and a navigation bar. The slicers are:

- Department:** Land and Resource Management, Legislative & Executive, Management and Budget, Planning, Public Safety, Public Works.
- Bureau/Agency:** Airport Operations, Benefits, Budget, Building Construction, Business Employment Resource..., Collections.
- Work Unit:** Enterprise Geographic Informati..., Environmental Inspections, Grounds Maintenance, Hap Baker Firearms Facility, Hashawha, Network.
- Status:** FT/Conting, FT/Contr, FT/Reg, PT/Conting, PT/Contr, PT/Reg.
- 2021 Retirement Risk:** At or Above Retirement Age, Below Retirement Risk and Age, Within Retirement Risk Range.

Below the slicers is a dark blue navigation bar with the following dropdown menus:

- Department
- Bureau/Agency
- Work Unit
- Status
- Retirement Category (2021)

Appendix

Staffing Model Details

Turnover Analysis

- Lists historical turnover over the last five years by department and year
 - Average turnover percentages are assigned a risk level: high (20%+), medium (10 – 19%), low (0 – 10%)
 - Each year and all average turnover percentages include one calculation with both general and grant employees and one with only general employees (i.e., grant employees are excluded)
- Presents historical turnover data over the last 5 years by department and projects cumulative turnover by department for the next 5 years

Turnover Analysis

Historical data from FY 2017 - 2021

| | |
|--------|---------------|
| Low | <= 10.0% |
| Medium | 10.1% - 19.9% |
| High | >= 20.0% |

| Department | 5-Year Averages | | | | | | | 2022 Turnover | |
|-------------------------------------|-----------------------|-----------------|-----------------------|-----------------|---------------------|------------------|---------------------------------------|---------------|-----------------|
| | Average Inv. Turnover | | Average Vol. Turnover | | Average Retirements | Average Turnover | Average Turnover (Grant & General) | General | General & Grant |
| | General | General & Grant | General | General & Grant | | | | | |
| Citizen Services | 3.4% | 1.5% | 12.7% | 5.8% | 6.0% | 17% | 8% | 33.8% | 15.3% |
| Comptroller | 1.9% | 1.9% | 4.4% | 4.4% | 7.0% | 8% | 8% | 15.0% | 15.0% |
| County Attorney | 0.0% | 0.0% | 4.8% | 4.8% | 2.6% | 5% | 5% | 9.6% | 9.6% |
| Economic Development | 3.4% | 2.3% | 11.3% | 7.5% | 2.3% | 15% | 10% | 29.4% | 19.6% |
| Fire & Emergency Medical Services | 0.0% | 0.0% | 20.0% | 20.0% | 0.0% | 20% | 20% | 40.0% | 40.0% |
| Human Resources | 1.4% | 1.4% | 2.5% | 2.5% | 2.9% | 4% | 4% | 7.9% | 7.9% |
| Information and Technology Services | 0.0% | 0.0% | 1.2% | 1.2% | 3.5% | 1% | 1% | 2.4% | 2.4% |
| Land and Resource Management | 0.0% | 0.0% | 4.0% | 4.0% | 3.8% | 6% | 6% | 11.6% | 11.6% |
| Legislative & Executive | 2.9% | 2.9% | 5.7% | 5.7% | 2.9% | 9% | 9% | 17.1% | 17.1% |
| Management and Budget | 4.0% | 4.0% | 6.7% | 6.7% | 5.3% | 11% | 11% | 21.3% | 21.3% |
| Planning | 3.6% | 3.6% | 14.9% | 14.9% | 1.8% | 19% | 19% | 37.1% | 37.1% |
| Public Safety | 5.5% | 5.0% | 9.7% | 8.7% | 1.0% | 15% | 14% | 30.3% | 27.4% |
| Public Works | 1.6% | 1.6% | 8.9% | 8.9% | 4.6% | 11% | 11% | 22.5% | 22.4% |
| Recreation and Parks | 0.8% | 0.8% | 11.2% | 10.8% | 2.4% | 12% | 12% | 24.0% | 23.1% |
| Total | 2% | 2% | 8% | 7% | 4% | 10% | 9% | 20% | 18% |

Appendix

Staffing Model Details

Retirement Risks

- Presents retirement data within each department rated by retirement risk
- Within each department, the number of employees that fall within each of the retirement risk categories (outlined above) are scored by the percentages within each category
 - As the number of employees either Within the Retirement Range or At or Above Retirement goes up, the relative risk likewise increases
 - These increases in risk are scaled from relatively low risk (green) to high risk (red)
 - The baseline risk assessment on this tab reflect the current calendar year (2021), but permits the user to toggle the year from 2022-2026
- The risk assessment reflects the current employee census, and updates to the census will be need to continue to use this feature in subsequent years

Retirement Forecast

| | Low | Medium | High |
|-------------|-----------|------------|-----------|
| Below Age | 75 - 100 | 50 - 74.99 | 0 - 49.99 |
| Combination | 0 - 19.99 | 20 - 39.99 | 40 - 100 |

Below Retirement Risk and Age: Employee age is below 57.3 years old

Within Retirement Risk Range: Employee age is between 57.4 and 62.4 years old

At or Above Retirement Age: Employee age is at or above 62.5 years old

Combination: Employee age is greater than or equal to 57.4 years old (combines the "within" and "at or above" categories)

Year: 2024
PT Exclude: No

| Department | N | Below Retirement Risk and Age | | | | Within Retirement Risk Range | | | | At or Above Retirement Age | | | | Combination | | | |
|-------------------------------------|----|-------------------------------|-----|------|-----|------------------------------|------|------|-----|----------------------------|-----|------|------|-------------|------|------|------|
| | | 2021 | | 2024 | | 2021 | | 2024 | | 2021 | | 2024 | | 2021 | | 2024 | |
| | | N | % | N | % | N | % | N | % | N | % | N | % | N | % | N | % |
| Citizen Services | 58 | 39 | 67% | 36 | 62% | 11 | 19% | 8 | 14% | 8 | 14% | 14 | 24% | 19 | 33% | 22 | 38% |
| Comptroller | 31 | 25 | 81% | 18 | 58% | 2 | 7% | 8 | 26% | 4 | 13% | 5 | 16% | 6 | 19% | 13 | 42% |
| County Attorney | 6 | 2 | 33% | 2 | 33% | 4 | 67% | 0 | 0% | 0 | 0% | 4 | 67% | 4 | 67% | 4 | 67% |
| Economic Development | 45 | 27 | 60% | 21 | 47% | 4 | 9% | 9 | 20% | 14 | 31% | 15 | 33% | 18 | 40% | 24 | 53% |
| Fire & Emergency Medical Services | 1 | 0 | 0% | 0 | 0% | 1 | 100% | 0 | 0% | 0 | 0% | 1 | 100% | 1 | 100% | 1 | 100% |
| Human Resources | 12 | 11 | 92% | 9 | 75% | 1 | 8% | 3 | 25% | 0 | 0% | 0 | 0% | 1 | 8% | 3 | 25% |
| Information and Technology Services | 32 | 21 | 66% | 11 | 34% | 6 | 10% | 13 | 41% | 5 | 16% | 8 | 25% | 11 | 34% | 21 | 66% |

Appendix

Staffing Model Details

Census

- Contains the source employee census data from which the earlier tabs draw
- Initial census data was received in October 2021
- Employee age and years of service have been aged to December 31, 2021
- This employee census data can be updated to reflect future census files in subsequent years
 - Segal can provide assistance with updating the employee census and connecting this tab with the others, upon request