

December 2021 » Features » Management makes our organizations run

# Management makes our organizations run

Renee Tyler, MPS, Director of Community Services, City of Eau Claire, Wisconsin, and member, APWA Leadership and Management Committee and Governmental Affairs Committee; Harry Lorick, P.E., PTOE, PWLF, Principal, LA Consulting, Manhattan Beach, California, and member, APWA Leadership and Management Committee and incoming APWA SoCal Chapter President



Last year, the APWA Leadership and Management Committee outlined a framework for leadership. This year a complementary effort is being demonstrated for management. The two purposes are harmonizing yet provide a different perspective. We, as public works leaders, need a healthy organization that requires both leadership and management to be fully implemented. For example, in a county organization, one of the authors of this article was an assistant public works director. The director of public works in that county, as a leader, made the policy decisions and

laid the basis for the organization's vision and goals. The author's role, as a manager, was to implement those functions to work with employees to attain those goals effectively and efficiently. Let's look at the differences between leadership and management.

### **OK, What is the Difference?**

The primary function of management is to provide order and consistency to organizations, whereas the main role of leadership is to create change, vision, and movement (Northouse, 2019). The author's example was an experience where he performed the management function while the public works director worked from a leading perspective.

Management is about seeking order and stability; leadership is about pursuing adaptive and constructive change. Although they are different in scope, Kotter (2012) indicates that both management and leadership are essential for an organization to prosper.

### **Management**

Management was created to reduce chaos in organizations and make them run more effectively and efficiently. The primary functions of management are planning, organizing, scheduling/ delegating, staffing, and controlling (Northouse, 2019). The overriding role of management is to guide staff in an effective and efficient operation following the vision established by leadership. Another key goal is to serve customers, yet it is often overlooked in management considerations, which is amazing because serving customers is the core tenet of every public works organization. The organization should in turn question the resulting impact of its public service from its customer service orientation.

Management is a human action to facilitate the production of valuable outcomes.

The ability to lead presents a manager with several major challenges. Four challenges which have an overarching impact on public works managers include:

- Focusing on outcomes.
- Creating innovative and creative ways to attract great people.
- Increasing the public's perception of the value of public works.
- Acknowledging and dealing with mental health and stress experienced within the workplace (Waxman, 2014).

In summary, management is a human action to facilitate the production of valuable outcomes and, in our case, to maintain and enhance the public infrastructure and provide service to all the users. So, let's look at these functions from a public works perspective.

### **Planning**

The first function is based on utilizing leadership's vision and direction for the organization and establishing specific goals and objectives to achieve it. This includes the development of policies, guidelines, and standards that can be used to enable the completion of annual and multiyear plans. This involves establishing asset systems, identifying service levels, preparing labor and other resources, and compiling infrastructure inventories that can be used to recreate plans to guide the organizations. Gone are the days of estimation and excel worksheets. Proper asset management and planning requires tools such as computerized management work systems, detailed policies on process and work, annual budgets, and capital improvement programs. A plan is necessary as onetime baseball great and common sense philosopher Yogi Berra said, "If you don't know where you are going, you could end up somewhere else."

### **Organization**

The second function takes the plan and develops an organization's structure with adequate resources required for the full completion of the organization's plan and policies. This function includes the projection of labor, equipment, material, and contract resources to adequately meet all of the organization's goals. Further to complete these

objectives, an organization must manage several other resource types such as financial, technological, and even natural resources.

In public works, we must cover all assets associated relevant to managing the infrastructure assigned to us, whether streets, traffic controls, stormwater, fleet, utilities, or facilities. This effort requires public works to create a human organizational structure with layers and spans of controls that will be utilized to effectively meet specific goals via communication, delegation, and resource planning.

Management is a critical function that when given direction makes the organization run and operate smoothly.

### **Scheduling/Delegating**

The third function is implementing the planned work and responding to customer requests on a short-term basis. Scheduling establishes a methodology of defining work that can be accomplished on a monthly or less timely basis. Delegation in leadership not only helps get things done, but it also empowers employees by giving them greater autonomy. (Wright, 2019). Together these two actions function to provide the delegation and assignment of specific labor, equipment, material, and contract resources needed to remain on schedule. Examples of this in public works are the utilization of proactive routine preventive programs such as road striping or inlet cleaning accompanied by requests such as potholes and debris removal from the public, elected officials, leadership, and proactive programs. The result is strong planning and organizing information that translates into an actual-world application of work being planned on a short-term basis.

### **Control/Improving**

This function focuses on tracking the work effort with accomplishment and resources used as compared and contrasted against what is planned. This includes pioneering innovative ways of aligning all available resources using analytics to make decisions that yield the best service to the public and elected leaders.

This process improvement function is the application of performing work and then monitoring the effort to determine if it complies with plans, policies, guidelines, and goals and identifying what actions need to be taken to get on track. The manner in which an action is performed is examined and compared for improvement on an ongoing basis versus a review of completed plans and desired work results after the fact and then adjusting by reallocating resources, training, or restructuring. The use of internal and external benchmarks can be used to identify where an organization stands and how it can improve. Among the activities include steps to consider process improvement by using the information collected against policies and goals.

### **Staffing**

This function relates to the efforts to properly develop a culture for staff, provide communication skills, and align resources within the organization. Required steps include recruiting, hiring, onboarding, and creating motivation and discipline for the employees. In addition, staffing includes the use and development of teams through cross training, and leadership development. It is important to utilize staff in other functions. The challenge of learning new tasks and working within areas of the unknown will help to foster internal growth and development. It is important to note that the engine that runs public works is their employees and creating them is a critical component for success.

In 2022, each of these five functions will be explored in detail over the next ten months.

Communication is a crucial factor required to accomplish staffing goals. Staff communication should be written and presented; the manager should acknowledge the need for verbal and nonverbal styles for internal and external sources. In addition, the effort must manage conflicts, negotiate work, manage diversity, and create abilities to mentor and coach employees. Finally, as past well-known international public works management expert Roy Jorgensen stated in a management approach, "It is all about the people."

### **Summary**

Management is a critical function that when given direction makes the organization run and operate smoothly. This article provides an overview of each of the five functions covered in this month's publication. Further, this coming year 2022, each of these five functions will be explored in detail over the next ten months. These articles should help guide our organizations in fully applying ways to optimize accomplishing organizational goals and provide guidance to enhance employee capabilities and meet the challenge of maintaining infrastructure.

*Renee Tyler can be reached at [renee.tyler@eauclairewi.gov](mailto:renee.tyler@eauclairewi.gov) (<mailto:renee.tyler@eauclairewi.gov>); Harry Lorick can be reached at [Hlorick@laconsulting.com](mailto:Hlorick@laconsulting.com) (<mailto:Hlorick@laconsulting.com>).*

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Look for upcoming Reporter articles to help guide our organizations in meeting goals, raising employee capabilities and maintaining infrastructure.



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December 2021 » Features » Managing through continuous improvement

# Managing through continuous improvement

Anthony Smith Management Analyst II City of Livermore, California



Science fiction writer Ursula K. LeGuin once said, “It is good to have an end to journey towards; but it is the journey that matters in the end.” I’m sure I will surprise no one when I say that there is no such thing as perfection. But we can always be on a journey in search of improvement.

One of the fundamental management skills you will want to add to your toolbox is fostering improvement. Improvement is not something you can force on your team, not something you can make happen. But it is something you can nurture. Like all management skills, you’re not born with it, but you can practice and develop it. To help you in your journey, think about Measuring, Empowering, Communicating, and Piloting.

## **Measuring: Select Goals Collaboratively and Compare Progress**

An important part of creating goals is doing it with your staff instead of to your staff. Doing this collaboratively can help build trust and set achievable goals that your team actually cares about. There is no better way to get “buy-in” than to give your team members a voice in the process. *Radical Candor* author Kim Scott tells a story in her book about how she restructured a team at Google to encourage accountability (Chapter 4). The team was disjointed with no clear reporting relationships, and no clean lines of responsibility for functional areas. She did the right thing in terms of how

she restructured the group, but she came to find out that she did it in the wrong way. She did not involve her team in the effort and came off as an autocrat in a democratic workplace. She didn't explain why she was making the changes and soon three of her five managers left. Luckily, she was given an opportunity to correct her mistake, and rebuild her team.

Once you have goals, you need to pick the right ways to measure success. It's almost impossible to know if you have improved if there is no yardstick to measure against. Numbers, in the form of key performance indicators (KPIs), can be incredibly useful. Think hard, and ask tough questions of your team, to see if the KPIs you currently have make sense. Are they things that are actually in your team's control? Are they things that measure what you really want to measure? Will they help you create actionable insight? An example of a less-than-useful KPI for measuring improvement might be the number of phone calls received. Your staff have zero control over this and it is unlikely to give you any useful insight. Dig deep into the nature of these numbers to see if they truly offer you the ability to measure your progress.

## **Empowering: Create Decision Making Tools to Empower**

### **Your Staff**

Creating a set of clear decision-making rules can help your team find new, creative ways to improve. Improvement will take forever if all of the decision-making power is concentrated in you. Instead, think of common sense rules for decision-making as a way to empower your staff to work towards improvement. Ask your team for ideas on how to help empower them. Ask probing questions, and even more importantly, listen. Your team is an incredible resource; use both their individual knowledge and their collective wisdom.



For example, you may want to allow your staff to spend up to \$100 (no questions asked) on things they think will help improve the workplace and business processes. This might be a book, or cloud-based subscription service, or something as simple as a timer, or work lamp. The point is to ask your staff what they think would help them, and then set up rules to help them take the initiative. When your staff feel empowered, they are more likely to bring up potential solutions.

## **Communicating: Tell People the Why & Keep an Open Mind**

If you really want to help your team improve, you need to communicate the why. Teaching someone else invariably helps us better understand. Likewise, communicating the why behind a policy or business process will help you clarify your own understanding and allow your team some insight into your thought process. By really interrogating the why behind something you will all come to a better shared understanding. And then, you can find ways to improve.

It is also important to be willing to admit when we come to the wrong conclusion. Keeping an open mind and being willing to admit when you are wrong is a great way to show your team that you value their input and to build trust. This will help create an environment where your team members are willing to speak up without fear. And some of the best ideas your team has will come from the people closest to the processes. Ultimately, it is more important to get it right, than to be right.

### **Piloting: Take it for a Test Drive**

Improvement requires change. But change can be scary. Like sales tax measures that have a sunset, pilot programs can make that change seem a little less scary. Dr. Frank Benest, a favorite author and speaker of mine, recommends in his Career Compass column that we “pilot everything” because upper management, elected officials and even the public “will expect some ‘mis-steps’ which will then help you fine-tune the program. The right language helps you shape expectations and minimizes the risk.” I commonly ask my colleagues to try something out, telling them if it doesn’t work we’ll come up with something better. Sometimes it pans out, sometimes it doesn’t. But it has helped us all be more open to change.

### **Conclusion**

Continuous improvement is important for the health of our organizations. Fostering an environment where your team members can make decisions is empowering. Empowering your employees can encourage them to take ownership of the team’s goals. And ownership can help encourage improvement. Remember, continuous improvement is a journey, not a destination. Happy travels!

*Anthony Smith can be reached at [awsmith@cityoflivermore.net](mailto:awsmith@cityoflivermore.net) (<mailto:awsmith@cityoflivermore.net>) or (925) 960-8121 (tel:9259608121).*

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December 2021 » Features » Mastering Management: Scheduling and Delegating

# Mastering Management: Scheduling and Delegating

Chris Anderson, ASCT, CPWP-M, Public Works Manager, City of West Kelowna, British Columbia; Member, APWA Leadership and Management Committee; President, British Columbia Chapter



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Mastering Management. Sounds easy, right? But for any new or experienced public works supervisor, manager, or leader, mastering your technical management skills takes time and effort. For our 2022 *Reporter* series, the Leadership and Management Committee is going to be focusing on the technical side of management, and this particular article will provide some introductory insights into one of the five main technical topics of management: Scheduling and Delegating.

## Scheduling

As a manager, scheduling everything within your realm of responsibility, is likely one of the most important technical skills you will need to master as a manager for your organization in order to build your team into a successful and productive group. That said, the required level of detail that you will need to put into your scheduling efforts is likely a



direct link to the size and sophistication of your org chart. For example, if you are serving as a Director of Public Works for a large local government, where you may have an excellent group of supporting managers, supervisors, administrative assistants, superintendents, foremen, etc., one could safely assume that your scheduling efforts are focused on the high level and strategic requirements of your role, trusting that your other team members are focusing on their “day-today” schedules and responsibilities.

Source: <https://pixabay.com/illustrations/infographic-graphic-information-4817430/>

But how might this Director’s focus and scheduling efforts differ from that of a Manager of Public Works in a small town where the Manager is not only responsible for public works (example: water, sewer, roads), but the added services such as engineering, facilities, and parks? In this particular case, the Manager also doesn’t have the benefit of any supervisors or foremen. How do you think this Manager would manage their scheduling efforts as compared to the Director mentioned previously? Either way, both individuals will have various factors that influence their scheduling, so recognize those factors and consider them carefully as part of your scheduling. Then, of course, and in fine public works fashion, how often do our much-toiled-over schedules have to be thrown out the window given some sort of emergency! At least you tried.

One can easily do some basic “google research” to find great strategies for scheduling yours or your team’s tasks, but here are four that have always stood out for me:

- Know your business/task/ workload.
- Know your team and build the schedule around them.
- Communicate the schedule clearly.
- Be prepared for and allow flexibility...stuff happens.

To elaborate on these strategies a bit further, and to try and provide a bit of an illustration, I quite often find myself thinking about an idea that was instilled in me during my early years as a supervisor. Pebbles, rocks, and boulders. How should one organize theirs or their team’s schedule in order to maximize safety, efficiency, and productivity for the organization?

By referencing the four noted strategies above, focus on how you will schedule your resources (whatever those are) in order to put yourself and your team in the right place for success—recognizing that your pebbles shouldn’t take a boulder’s amount of time, and that your boulders will deserve much more time, effort, and focus than any of your pebbles ever should.

## **Delegating**

Learn the art of delegating. Why? Because as a management leader you simply can’t do it all, and you’ve likely got an amazing team of people around you who are keen, willing, and able to help you accomplish your operational and organizational goals. Similar to the two examples above, the size and sophistication of your organization will obviously play a role in how much you are able to delegate out, but either way, empower your teams to get the job done!

I like to refer to delegation as a leader’s ability to accomplish organizational goals/tasks/projects/jobs through the safe and efficient deployment of your team. For many new supervisors and managers, there can oftentimes be the desire to do the work yourself or micromanage to a point where you are basically doing the work anyways. Part of being a successful leader, especially for an individual who is moving up through an organization, is the ability to learn and implement the technical skill of delegation. It’s no longer your job to do those tasks, you are now the one directing and delegating those tasks. Find your own personal way to authorize your team to get things done. As mentioned earlier, the people on your team are extremely capable and want to do a good job, so by delegating and assigning to them appropriately you will find that your team gains the sense of empowerment which then leads to greater trust, pride, and job satisfaction.

So, what are some quick and helpful tips for delegation such that you can transition your team to that place of empowerment, trust, and pride? Here's another quick list:

- Explain what it is you want done.

Make it as clear as possible.

- Provide reasons for why you need it done. What is the purpose?
- Provide clear communication and expectation on their decision-making authority and responsibility.
- Assign a deadline and then ask for an understanding of the task and schedule.
- Follow up and provide assistance if necessary, but do not micromanage.

While the intent of this article isn't to focus on the negative, it should be recognized quickly. Be prepared for your delegated tasks not getting done to your satisfaction, or honestly, failing. As long as your team wasn't acting with any lack of due diligence, understand that mistakes will happen, and use these situations as a learning and coaching moment that leads to ongoing and continuous improvement.

The art of delegation isn't necessarily easy all the time, because it truly is an art. But leaders who can delegate successfully will find that their teams will continue to grow with confidence, increase in productivity, and flourish your organization into highly desirable work environments.

*Chris Anderson can be reached at (778) 797-8842 (tel:7787978842) or [chris.anderson@westkelownacity.ca](mailto:chris.anderson@westkelownacity.ca) (mailto:chris.anderson@westkelownacity.ca).*



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December 2021 » Features » Mastering Management: Staffing

# Mastering Management: Staffing

Elia Twigg, P.E., Local Agency Manager/Senior Project Engineer, CONSOR Engineers, Indialantic, Florida; member, APWA Leadership and Management Committee



Image by VIN JD from Pixabay

Mastering management requires the skill of managing people who do the work for the organization—in other words, it is all about the people.

The people are the most important and valuable asset in an organization. Whether it is hiring, retaining, developing, reviewing and/ or changing the people, successful projects, programs, and processes cannot happen without the right people in place and having the right people in place cannot happen without the right manager to manage the people.

Managing people is a full circle of hiring, retaining, developing, reviewing, and changing the people.

## Hiring

Hiring the right person for the job is key, but know your needs before you seek out the new employee(s). Take the time to write a good job description to help applicants understand the role and responsibilities and take the time to CHECK REFERENCES! People can speak eloquently in an interview and can “stretch” the truth about their work history, but speaking to their references can give you more insight into the person’s capabilities. If the person was good, references

will talk a lot about the candidate. Be wary if the reference was brief; that may be an indicator that the candidate is not the right fit for the job. The average cost of a bad hire is up to 30% of the employee's first-year earnings according to the U.S. Department of Labor. Take your time and hire the right people for the right job.

## **Retaining**

Spend the most time on your good employees. Retaining the good employees keeps things on track, improves morale, increases productivity, reduces costs, and provides for better customer experiences. People leave jobs for all sorts of reasons, but don't make management the cause of people leaving. Ways to keep the good employees around can include company culture, benefits, development opportunities, employee recognition, and constant communication. Get to know your employees and learn what makes them feel fulfilled. People want to feel like they are a part of something good, and when they are not feeling valued, they may look elsewhere.

You need to take the time to master the skill of managing people.

## **Developing**

Having a training and development program where people can enhance their skills and position themselves for upward mobility can have a lasting effect on your employees. Training and developing your employees provide many benefits, such as increased performance, a boost in productivity, reduced employee turnover, improved work environment and culture, and improved efficiency, which in turn, can improve the overall organization. Having a training and development program can also attract top talent to your organization and can provide a path for current employees to improve themselves.

## **Reviewing**

Reviewing employees can be a process that is cumbersome, and may be uncomfortable for some, but it is necessary to provide feedback to your employees, and this is a critical step for managers. People generally want to know how they are doing, and this feedback should be given frequently. Don't wait until the performance review to provide the feedback. By the time the performance review comes up, the employees should know where they stand. Also, if employees are not performing well, it is the manager's responsibility to sit down with the employee to talk about what is going on, and perhaps develop a performance improvement plan to get the employee back on track. If the employee continues to not perform to the designated standard, then it may be best to give them an opportunity to be successful somewhere else.

Consider the Pareto Principle, also known as the 80-20 rule. If you find yourself spending 80 percent of your time managing poor employees that only produce 20 percent of the results, then you may be wasting your time on those employees. That can cause a lot more undue stress on yourself and others in the organization. Managers have to make tough decisions sometimes, and I can promise you one thing—if you know the employee is a poor performer, I can guarantee you that others in the organization know that as well. If you are a manager and do nothing about it, the morale will decrease, the culture will change, and the great employees may leave. It is always better to deal with the problem, than to let it fester and develop other problems that could have been avoided.

## **Changing**

Sometimes the person hired was not the right fit, or sometimes an employee got promoted or changed to a new role, or sometimes responsibilities change and require employees to take on other work. Regardless of the change, change is inevitable. If you hired someone and they were not the right fit, you need to cut the tie swiftly before it is too late. Probation periods for organizations are a good idea, so use that time to evaluate if an individual is working out. Sometimes things just don't go as planned, and that is okay. It is better to release the person early on than to have them continue the poor performance. Others will see it, and to gain the trust and respect from the team, making those tough decisions is critical to the success of the organization. On the other hand, there are sometimes changes with promotions or lateral moves. These changes can negatively impact the organization or can prove to be the best thing ever. Sometimes people get promoted simply because they have seniority and they seemed like the most logical

person for the job, but that isn't always the best decision. Or sometimes a lateral move is made because that position is better suited for the individual. Regardless of the changes, managers need to be adaptable and manage the changes as they come.

### **Putting it all together**

The skill of managing people is just that—a skill. Skills can be learned. Sometimes people have the natural gift, but if it is not natural, and you are a manager, you need to take the time to master the skill of managing people. If you are a parent, you know that raising two kids in the same household requires different techniques to parent them. It is the same with managing people in the workplace. Some techniques work on some, while other techniques work on others. If you hire the right people for the job, spend time to get to know the employees to keep them in your organization, develop your employees with the proper training they need (and want), provide frequent feedback, and make the required changes with employees, you will be on the road to mastering the skill of people management! In my days as a Public Works Director, I had the best team, but that team was not an accident. It literally took all of these steps to put in place the perfect team, and it paid off. If you are struggling with people management, reach out to me. I have some tools that I can share to help you be successful. Good luck and happy managing!

*Elia Twigg can be reached at [etwigg@consoreng.com](mailto:etwigg@consoreng.com) (<mailto:etwigg@consoreng.com>).*



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December 2021 » Features » The value of planning

# The value of planning

Carolyn M. Fackler, P.E., MPA, Senior Project Manager, Minnesota Department of Transportation, St. Paul, Minnesota, and member, APWA Trending Technologies Subcommittee; Bill Stogsdill, CPM, CPWP-M, PWLF, Director of Public Works, City of Fairway, Kansas, and member, APWA Leadership & Management Committee



*"He who fails to plan is planning to fail."* – Winston Churchill

The words of Winston Churchill are as relevant now as ever. The basic value of planning is that it allows us to align our short-term activities with our long-term goals. It provides us clarity as we consider staffing and equipment needs, set our budgets and strategize our programs. Without effective planning efforts, we run the risk of wasting efforts and not being prepared for foreseeable events. Planning also helps us to be better prepared for emergencies.

All levels of staff throughout an organization can benefit from taking time to plan. In early career stages, planning efforts can help an employee learn the flow of an organization and their role in it, create strategic relationships, and anticipate upcoming opportunities. In progressing years, planning efforts become necessary as the individual can affect positive influence over more of the organization and have exponential effect.

Effective planning also allows us, and our organizations, to be more resilient. It prepares us for upcoming events and deadlines which frees up energy to respond to other things. By checking in with our plans regularly, we can adjust course when changes occur and understand where to find necessary resources.

## Planning Outline



meetings.

Five years. Most, if not all, organizations are projecting their capital investment program five years out. This allows for alignment between community planning efforts and capital investment. It also provides an opportunity for private development to anticipate profitable community investment strategies.

Finally, planning efforts should incorporate all aspects of your positional responsibilities, such as human resources, equipment and materials, and budget. Efforts should entail regular business as well as emergency responses. If necessary, these components should also be considered through the lens of seasonal change.

### **Ideas to Try**

Knowing that good planning takes time, it is often a question of how to fit these efforts into our busy lives. The following are some ideas of how to incorporate planning into your weekly activities.

Establish a Ritual. Reserve ten percent of your time for reflection and planning efforts. Block it out in your calendar. One idea is to use “no meeting Mondays.” Another is to reserve four hours on Friday for long-term planning and half an hour first thing on Monday for weekly alignment. The point is to find the time and reserve it.

Consider the physical space you’ll use for planning purposes. The office is not the only place where planning can occur; often there are distractions that will limit effective planning practices. Perhaps a coffee shop or a quiet room at a library will better suit the activity.

Journal. Part of planning is to learn from and grow our past practices. Take the time after meetings to jot down impressions or potential synergies. Use part of your planning time to consider lessons learned. Journals can be electronic or printed. There is a plethora of journaling options available. Find one that works for you.

Iterative Planning. Keep in mind that your planning efforts don’t have to be perfect. They will be a work in progress as events outside of your preview often change and shift. The idea is to establish direction, fill in details as possible, and look for opportunities. Do what works best for you.

### **Summary**

In conclusion, planning is an essential management tool but there is value in these efforts at all levels of the organization. Effective planning allows us to set a course towards our long-term goals while creating a space to reflect and look for opportunities. Without planning it is difficult, or even impossible, to align opportunity, budget and resources.

*Carolyn Fackler can be reached at (952) 594-1270 (tel:9525941270) or [carolyn.fackler@state.mn.us](mailto:carolyn.fackler@state.mn.us) (mailto:carolyn.fackler@state.mn.us); Bill Stogsdill can be reached at (913) 722-2822 (tel:9137222822) or [bstogsdill@fairwaykansas.org](mailto:bstogsdill@fairwaykansas.org) (mailto:bstogsdill@fairwaykansas.org).*



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January 2022 » Columns » Planning Your Work and Working Your Plan

# Planning Your Work and Working Your Plan

Jeffrey Thurman, MBA, CPM, Senior Consultant, LA Consulting, Manhattan Beach, California and Debary, Florida; member, APWA Leadership and Management Committee Knowledge Team



Maximizing resources through performance-based work planning and strategic thinking

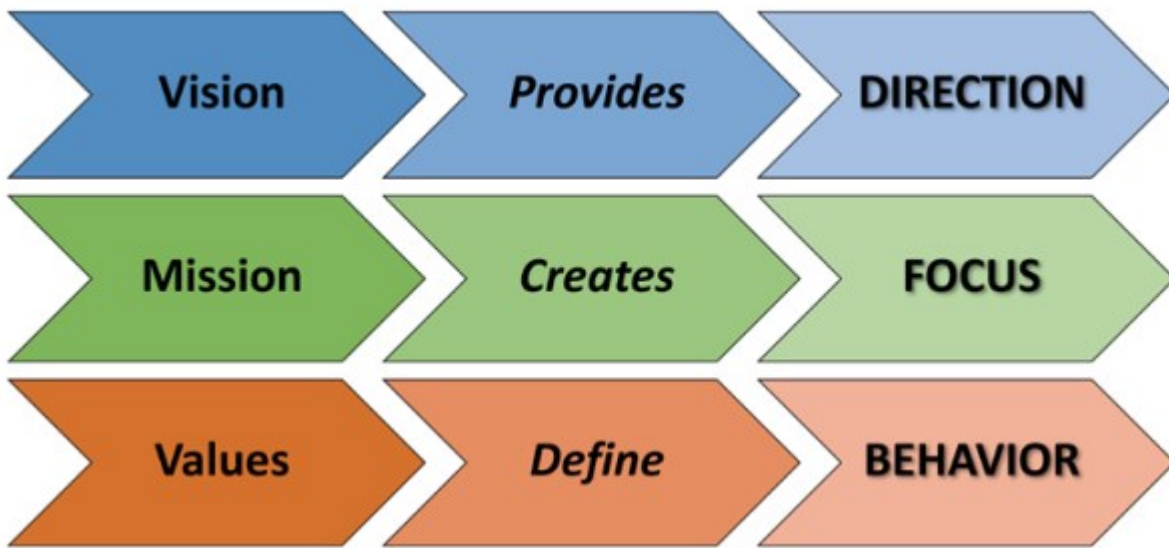
Henry Mintzberg (2004) stated that “Management is, above all, a practice where art, science, and craft meet.” This practice is necessary for public works leaders to apply performance-based work planning and strategic thinking for their organizations. This is one of the key aspects of the discipline of management that is critical for the success of public works professionals for their related organizations.

Planning is the first of five core functions that will be highlighted in the Mastering Management series, and this is the first of two articles focused on planning. The five management disciplines include planning, organizing, scheduling/delegating, controlling/improving, and staffing.

The core discipline of planning is the responsibility of an organization’s managers to focus, develop, and communicate a future course of action for the organization. These management professionals are also responsible for establishing targets and objectives, as well as defining the steps required to achieve these goals. Hence, the public works manager must devote time and effort to this vital cornerstone of a well-managed organization.

## Guiding Principles

Several key elements should influence a manager's process of strategic planning and course charting for their organization. An initial feature includes developing or reviewing the organization's guiding principles, such as the organization’s mission, vision, and core values (see figure on p. 45). The mission and vision statements should provide organizational direction, short- and long-range focus, and inspiration to staff for accomplishing shared goals. An agency’s values identify and express the cultural beliefs of the organization, both internally and externally.



The development of these principles should involve the systematic and holistic review of the existing organization, from mandates and directives to structure, resources, activities, and employee capabilities. Using facilitated employee teams can encourage buy-in from each level of the organization and institutionalization of these concepts. Finally, each decision by every employee should be made through the lens of these guiding principles and answer these questions:

- Does my decision or course of action foster our core values? Does my decision align with our mission? Does my action further our path towards reaching our vision?

**Vision.** The vision statement focuses on the future that provides the direction for the organization, three, five, or ten years out. It should inspire and create shared excitement in the potential to perform the work. Yet, the scope of the vision is also dependent on, influenced by, and supports the complexity of the manager's desired outcomes.

**Mission.** The mission statement should answer three questions: What does the organization do? For whom? And why? The mission is foundational to the now. It creates focus and provides a path towards the achievement of the vision. Thus, the vision statement should be developed before the mission statement to ensure that the mission supports the vision.

**Values.** Values describe the agency's organizational culture and define its behavior. They guide in the conduct of business and how service is provided. Values must resonate with internal and external stakeholders, including employees, residents, contractors, executive leadership, and elected officials. Ultimately, they define the organization's culture and beliefs, forming the fabric of the manager's agency.

These crucial principles should be influenced by and support the more central organization's guiding tenets (i.e., the division backs the public works agency that supports the governing entity). For example, a Street and Pavement Division nested within a Public Works Department will have a vision, mission, and values unique yet complementary to those of the Public Works Department. Similarly, the Department's vision, mission, and values should support the city's or county's adopted principles. Finally, each component should serve as a decision-making tool in daily interactions that guide behavior and exemplify the public works professional.

### **Components of the Plan**

A plan is dynamic—it is guided by the desired service levels, available resources, workload, and efforts of an agency. It has many components that are needed to plan and schedule work proactively. These include:

- **Activity List** – A description of all activities performed and tracked by the agency or respective departments (e.g., roadway sweeping, sewer line cleaning, pump station repair, sign inspection).

- **Assets or infrastructure responsibilities** – location, amount, and condition of the organization's assets such as streets, stormwater, and signs infrastructure.
- **Available Labor and Equipment** – Labor and equipment resources required and potentially open to maintain and operate the agency's responsibilities. The amount and availability of engineers, equipment operators, and other staff and related amounts and types of trucks, heavy equipment, and support apparatus.
- **Labor and Equipment Rates** – Hourly labor, overhead, and equipment rates help determine the cost of an activity and how much of each resource is cost effective for the agency to allocate to the activity.
- **Activity Guidelines or Operating Procedures** – Procedures describe the resources needed for each activity, how they are performed, when/frequency, productivity, and service level.
- **Work Plans** – These previous components are then linked to determine work based on work, assets, resources, and mission. This allows for work to be proactively planned and assets maintained and operated effectively and efficiently by agency resources.

### **Know Your Responsibilities and Actions**

When creating a performance-based work plan, a manager must know the functions and assets of their organization. For example, a traffic engineering group cannot establish a plan or a preventive maintenance (PM) program without knowing the type and amount of their street miles, signalized intersections, signs, and other assets. Second, the manager needs to understand the necessary measures to fulfill the mission and vision, such as traffic signals work activities for preventive maintenance, response, and enhancement. These amounts of assets and work categories are needed for a workable plan.

### **Establish Levels of Service and Expectations**

External stakeholder expectations, mandates, and directives, as well as anticipated productivity, all influence a manager's establishment of service levels for the activities and services their organization will provide. These service levels are planned to maintain the public infrastructure and meet all customer needs utilizing the available resources. Planning and performing preventive maintenance to extend the useful life of assets is preferable to limit the need for corrective maintenance (performed after a deficiency occurs) or emergency maintenance.

A typical example is the level of service to maintain a road at a predetermined pavement maintenance level to ensure roadway travelers' safety and prevent the need for emergency repairs. The Pavement Condition Index (PCI), developed by the U.S. Army Corps of Engineers for their PAVER system, rates pavement condition on a 0-100 scale, with a score of 100 indicating no distress to the roadway (Johnson, 2000). While this type of rating may be very challenging for an agency to achieve regularly, the agency can set the PCI rating they believe to be sufficient based on their resources to meet it.

### **Identify and Estimate Resources (Labor, Equipment, and Materials)**

Another element of a manager's planning discipline, directly related to budgeting and fiscal accountability, is identifying and estimating the needed resources to meet or exceed the organization's annual performance work plan and budget. The plan must include the type, amount, and availability of resources to meet the organization's desired service levels.

The manager must first identify all available labor resources and their capacity and capability to perform activities. This will need to be balanced according to the prioritization of activities and set levels of service. Each activity will require a certain number of workers, depending on the physical work needs, time to complete the work, and required skill sets. This, in turn, will help to determine the number of crew days allocated for these activities.

Equipment and materials needed for an activity will go hand in hand with the determination of labor resources. Each activity requires specialized equipment and materials, which must be specially ordered or set aside for the activity. Occasionally, these resources also require specialized knowledge or licenses. The manager will need to estimate the

type and amount of equipment and materials to complete the quantity of work and when and how they will be stocked. Sometimes vehicles are interchangeable, but specific vehicles are needed to either perform the work or carry the equipment and crews to the work location. Other considerations, such as COVID-19 safety protocols and travel precautions, will be vital to making these resource determinations.

### **Budgeting and Fiscal Accountability**

Budgeting and fiscal accountability are other vital areas influencing a manager's strategic planning and course-plotting process. This requires matching the financial resources needed to accomplish the organization's goals and objectives. This requires assessing the financial limitations of work and related planned resources, which balances work designed with the budget. This helps ensure that planned work can be accomplished within financial constraints, promoting, and demonstrating resource stewardship and accountability to the organization's internal and external stakeholders.

### **Working the Plan**

Once the plan is developed, it must be systematically utilized. The plan is similar to a report card for a student. If a student decides on what grade they want to achieve, it requires diligence throughout the year to ensure that the plan is met. One cannot wait until the end of the year to determine if one is on course with the plan. The plan is used throughout the year to decide what actions are needed to ensure adherence to desired goals. The plan is also the sum of its parts—it can only be fulfilled if all components are accounted for, and will change as its components change.

For example, in road maintenance, after establishing a crack filling plan for the year, the supervisor and managers must deliberately use and monitor the plan to ensure adherence throughout the year and use it as a framework. The subsequent management article will address how planning can be explicitly accomplished in public works and the various planning functions required.

Scheduling work is another management function that will also be discussed in subsequent articles, yet the function is key to executing the performance-based work plan. First, it is critical to understand when certain activities must be completed and how frequently. Then, after allocating the appropriate resources, the work can be divided up throughout the year for proactive or preventive maintenance. The plan will be adjusted as response and emergency issues arise. It is essential to balance the organization's annual labor and other resources projections with the agency's budget while adapting as required to provide unforeseen services to stakeholders.

### **Adjusting the Plan**

It takes application experience to understand how plans can be effectively utilized yet be flexible in dealing with those unknown factors of weather, staffing, politics, and emergency events such as fire, floods, earthquakes, hurricanes, etc. Critical for success is understanding when and how to adjust the annual plan and build in time for unanticipated events. At the end of the fiscal year, an agency should compare the plan efforts with the actual accomplishment. This comparison can help determine whether the agency is on track to meet its goals and whether the estimates need to be revised for the following year. A significant benefit comes from analyzing the trends year-over-year that help to guide organizational resources, providing services and managing assets.

### **Work the Plan for Success**

In conclusion, planning as a strategic reasoning process should be viewed as a portion of the whole. Planning, like completing a construction project, takes a significant team effort. The plans must be continuously reviewed, along with the sub-components like existing resources and processes. Making the plan work requires tracking work accomplishment, comparing the planned versus actual accomplishment, and improving decision-making and performance via using your performance-based work plan as a framework to manage. Hence for a plan to work, it must be accepted and utilized systematically as a framework for all decisions.

The final key to this responsibility is a commitment by public works leaders, managers, and employees to execution towards continuous improvement. Peter Drucker (2021) summarized this in a quote: “Unless commitment is made, there are only promises and hope, but no plans.”

The other five core management functions will be continually highlighted in this year’s Mastering Management series. The following month’s article will discuss steps to create a plan from these concepts.

*Jeffrey Thurman can be reached at (310) 374-5777 (tel:3103745777) or [jthurman@laconsulting.com](mailto:jthurman@laconsulting.com) (<mailto:jthurman@laconsulting.com>).*

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February 2022 » Columns » What does a work plan look like?

# What does a work plan look like?

Zachary Zeilman, PP, Consultant, LA Consulting, Manhattan Beach, California, and member, APWA Southern California Chapter; Harry Lorick, P.E., PTOE, PWLF, Principal, LA Consulting, Manhattan Beach, California, member, APWA Leadership and Management Committee, and Southern California Chapter President



A public works leader must plan, but it is not always clear what that “plan” may look like. The concept of planning in public works management most often refers specifically to developing a *work plan*.

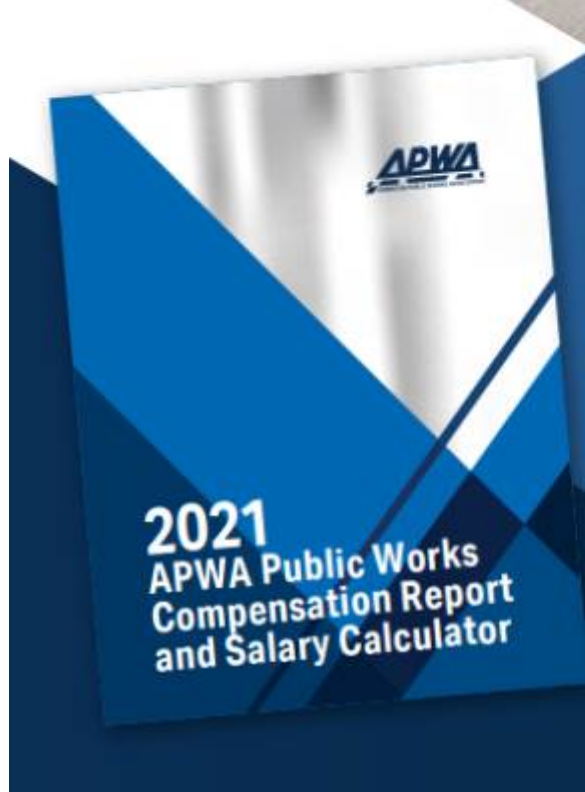

This article is the second of ten in the series on Mastering Management, focusing on planning and how a plan can be created to guide an organization. This article builds upon the basic tenets of planning and development of a work plan discussed in the first article of this series, “Planning Your Work and Working Your Plan” (Thurman, 2021), and provides more detailed steps to building a work plan.

A work plan is a pre-defined set of goals and quantitative expectations used by project managers and other leaders to proactively guide the organization’s workload throughout the year by ensuring that appropriate resources are available. This enables leaders to project which roads will be crack sealed, signs replaced, and the next stormwater lines to be installed and link them to available resources and budgets. In addition, obtaining approval from elected officials and senior leadership for additional resources and the feasibility of work requires a plan with focused direction. Without a



plan, the chances for effective and efficient work accomplishment are diminished, even in organizations that have considerable available technology. As stated by famous businessman and author John Beckley, "Most people don't plan to fail; they fail to plan."

Work plans can be used for many different types of organizations and activities; however, here we discuss their role in facilitating maintenance and operations, as well as engineering and construction. The steps for creating and utilizing a work plan described below apply to both types of organizations but with slight variations.



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There are several steps to consider when developing a work plan that will work for your organization and not the other way around. The first step is to consider the organization's goals and stakeholder desires that will be pursued. The second step is to understand the components of a work plan and decide how to achieve these goals. The third step is to determine how to use available resources to achieve the identified goals. The fourth step is documenting and automating the process in a computerized system, such as a work and asset management system (CWAMS). The final step is to utilize the work plan and collected data for decisionmaking. After the plan timeframe has passed (typically one year), leadership must review the planned versus actual work and revise any parts of the work plan that will not meet the organization's expectations for the following year. Work planning must become an iterative process to encourage organizational improvement.

The steps to create an annual work plan are described below in greater detail.

### **Step 1. Determine Organizational Goals**

Determining organizational goals will take time and effort unless they have already been established and agreed upon by all stakeholders. Facilitated teams of employees at all levels of the organization are vital to encouraging buy-in of the organization's vision, mission, and values.

As discussed in the first article of this series (Thurman, 2021), these three principles are set according to a few different factors. Typically, there are mandates and directives established by higher government entities, politicians, and leaders, or even by courts. The desires and expectations of community members are also essential to consider. And then, there is the organization's leadership, such as the Public Works Director. These must all be in alignment to set the vision, mission, and values, which, in turn, drive the goals.

Unlike the vision, mission, and value statements, an organization's goals should include both qualitative and quantitative measures that allow progress to be tracked against them. An example of a goal may be to respond to all work requests within one business day and to schedule and complete inspections within three days of a non-emergency work request. A performance measure could then be set to measure these goals. Goals can be revised throughout the work plan process as more data and knowledge are generated that can inform the plan's feasibility. Though goals are more dynamic over time, they should still ultimately drive the organization's efficiency and effectiveness.

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### **Step 2. Work Plan Components and Deciding on an Approach**

The work plan is your organization's blueprint to complete all work in the most effective way. A work plan is based on the organization's activities, asset and infrastructure responsibilities, available labor and equipment and their rates, and activity guidelines/standards and operating procedures/policies. Therefore, it is essential to understand the components of the work plan and how it works prior to setting rates and values.

The work plans for maintenance and operations vary slightly from engineering and construction organizations, but generally follow a similar format. The components for each are outlined and defined below.

**Maintenance and Operations.** A work plan for maintenance and operations will describe the activity, asset inventory, level of effort, work quantity, average daily production (ADP), crew size, labor days, and dollars spent on labor, materials, equipment—total and per unit (APWA, 2008).

- **Activity** – An activity list should be the basis for the activities in the work plan. These high-level activities can be tracked and billed (e.g., loading a truck, fueling, and setting up a work zone are just a few tasks of the overall activity for *main sewer repair*).

- **Asset Inventory** – This field defines both the total amount (#) and unit type of the inventory for the specified activity. This is the primary asset or infrastructure for which the activity is performed (e.g., 600 miles of sewer main). The assets are the constants of the work plan, on which all else depends. In addition, specifics of assets that make up the asset inventory should be identified, such as location, size, type, ownership, and condition.
- **Level of Effort** – Level of effort is the frequency at which an activity is performed. It is critical to have activity guidelines or standard operating procedures that define how frequently each activity needs to occur. Whether it is preventive maintenance or by request, the frequency or level of effort can be estimated using any historical accomplishment records. This will also depend on the asset's condition and desired level of service. The level of effort is defined by how many times the activity will be completed within the plan timeframe (e.g., twice a year for inlet cleaning).
- **Work Quantity** – Work quantity is the amount of work expected to be completed (# of units) within the plan year (e.g., 45 inlets replaced). This is a function of the number of inventory units multiplied by the level of effort.
- **Average Daily Production (ADP)** – ADP is the average number of work units expected to be completed, such as eight stormwater inlets cleaned within one equivalent working day (e.g., 8 hours). This is a function of crew composition, work method, specific work tasks, and environmental factors.
- **Crew Size** – Crew size is the number of crew members needed to complete the task, balanced with how many are available and can be assigned to this task versus other tasks. Crew size will largely be determined by the availability and skills of crew members to complete the activity. Tasks must be prioritized when labor resources are limited/shared.
- **Crew Days** – With a given crew size, the amount of time needed to complete the task can be translated into total number of crew days allocated to an activity per year.
- **Labor (\$)** – This field calculates the total amount expected to be expended on activity within the plan year. This includes hourly labor and overhead rates to complete the task.
- **Equipment (\$)** – Equipment rates are calculated along with the total number of hours/days that equipment will be utilized within the plan year for each activity to determine the total cost.
- **Materials (\$)** – As with labor and equipment, material rates are calculated along with the total number of hours/days those materials will be utilized within the plan year for each activity to determine the total cost.
- **Total and Unit (\$)** – The total cost of an activity is the sum of the labor, equipment, and materials costs. The unit cost is the total amount of work per unit of work quantity.

Together, these components help determine much more than just the cost of an activity. Comparing activity by activity and year by year, the work plan allows decision makers to understand how much of each resource is cost effective for the agency to allocate to the activity and how they can expect to perform in the plan year.

There are many considerations and decisions that must be made to arrive at the best approach to the work plan. These include direction and responsibilities, community desires and mandates, assets and resources, processes and procedures, resources and availability, financial considerations, budgets, and strategic plans. The approach to developing the work plan comes down to prioritizing activities and dividing resources into each activity.

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**Engineering and Construction.** Work plans for engineering and construction organizations and activities will look similar in many ways, but there are some key differences. For example, these organizations often plan their projects and budgets over a much longer timeline (i.e., five or ten years rather than one year). This is largely because the projects tend to be much larger in scale and take longer to be scoped, engineered, and constructed than maintenance or operations activities. In addition, these activities are often linked to a Capital Improvement Program (CIP) and budget, whereas maintenance and operations are primarily funded out of the general fund.

Figure 1. Alternate emphases in construction planning (Figure 9.1 in Hendrickson, 2008)

While labor, materials, and equipment costs are critical to these types of projects, engineering and construction focus on and finish when a final product is achieved, rather than maintaining an existing asset at a certain level. Construction projects typically either aim for cost control or schedule control (see Figure 1). The first step is choosing the technology and construction method to be employed (Hendrickson, 2008). Then, as with maintenance and operations, it is necessary to define the work tasks with resources needs. The relationships among the activities should then be specified in what is referred to as *precedence planning* (Hendrickson, 2008). This process is unique to engineering and construction and should identify which activities must occur before, after, or in conjunction with other activities. Finally, each activity's duration and resource requirements must be estimated and loaded. This is then linked to a complete timeline by activity often displayed in a Gantt chart or using critical paths to optimize the schedule plan.

### **Step 3. Putting It Together – Linking Organizational Goals to an Actionable Work Plan**

As laid out in Step 1, the goals of the organization are to be linked with the work plan and resources outlined in Step 2. This step involves adjusting the numbers in the work plan several times to meet each activity's level of service and other goals with the resources available.

Unity, continuity, accuracy, and flexibility are terms that, ideally, guide the work planning process. In public works, many factors are beyond the manager's control. Weather and emergency events can lay waste to any plan. In governmental organizations, many decisions are political in nature and sometimes made to appease constituents, without full knowledge of the level of effort or length of time to complete an activity, nor how it will impact cost or quality.

Resource availability may also pose a challenge to meeting established goals and levels of service if they are not revised accordingly. During booming economic times, competition for technical, administrative, and operations labor can impact the supply and cost of labor. The cost of labor, materials, and equipment also affects the ability to meet desired service levels. As these factors are reviewed, updated, and allocated annually, goals should be adjusted to practical levels according to available resources and predictions based on previous experience.

### **Step 4. Systems and Documentation**

The complexity and variety of responsibilities and workloads of public works organizations necessitate technology to assist leaders and project managers in tracking work and making informed decisions. Computerized work and asset management systems (CWAMS) and project management (PM) systems are vital tools that have revolutionized the documentation and consistency of work planning and reporting.

Though the systems also vary in quality and capabilities, they aid organizations with projections and monitoring progress toward their goals. Most CWAMS and PM systems have built-in report writers or can be configured to export reports with vital information. This is preferable to external data collection and documentation with third-party applications (e.g., entering data manually into a Microsoft Excel workbook), as using a single system reduces the likelihood of human error and redundancies.

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System reports should include productivity in addition to costs. Managers are responsible for creating and adjusting the charts that display this information and monitoring the plan. In addition, bi-weekly meetings and monthly and annual reviews should be incorporated into a schedule to ensure that the organization is on track to meet its goals.

### **Step 5. Utilization and Decision Making**

Ultimately, the organization must justify its expenses and direction to its customers, the public, or a board of directors. Documentation, particularly through easy-to-understand analytics, is valuable to help managers present information and make a case for the work plan or ask leadership for additional resources.

Recordkeeping of both planned and actual work reduces uncertainty about risk in the future. Of course, there will still be emergency events and leadership changes that impact the organization's course of action. A solid work plan that is reviewed, updated, and maintained over many years, however, will factor into it these uncertainties to limit the impact to the overall level of service.

## Summary

Work planning can be quite simple but, nonetheless, critical to meeting an organization's goals and, ultimately, fulfilling its mission and vision. The method for developing a work plan will be slightly different depending on whether the focus is on maintenance and operations or engineering and construction.

These five basic steps should be followed to achieve a manageable work plan. It is crucial to remember that this is an iterative process that requires attention and regular upkeep. The work plan should be updated with changes of assets, resources, work effort (productivity), and costs annually or whatever period for which it is used. A work plan is essential for moving an organization from functioning to improving/ excelling and should be monitored continuously to be able to achieve the planned goals. Hence, a public works leader can plan for success.

Once the work planning function has been established and solidified, the organization can then focus on subsequent management functions of organizing and establishing the structure to work the plan and, after that, directing/scheduling the work, and finally controlling and improving the work. This is all under the umbrella of adequately staffing to achieve the desired results. Next month's article discusses how the structure must be established for labor, equipment, and material resources to be given responsibilities to achieve the organization's plans and goals.

*Zachary Zeilman can be reached at [Zzeilman@laconsulting.com](mailto:Zzeilman@laconsulting.com) (<mailto:Zzeilman@laconsulting.com>); Harry Lorick can be reached at [Hlorick@laconsulting.com](mailto:Hlorick@laconsulting.com) (<mailto:Hlorick@laconsulting.com>).*

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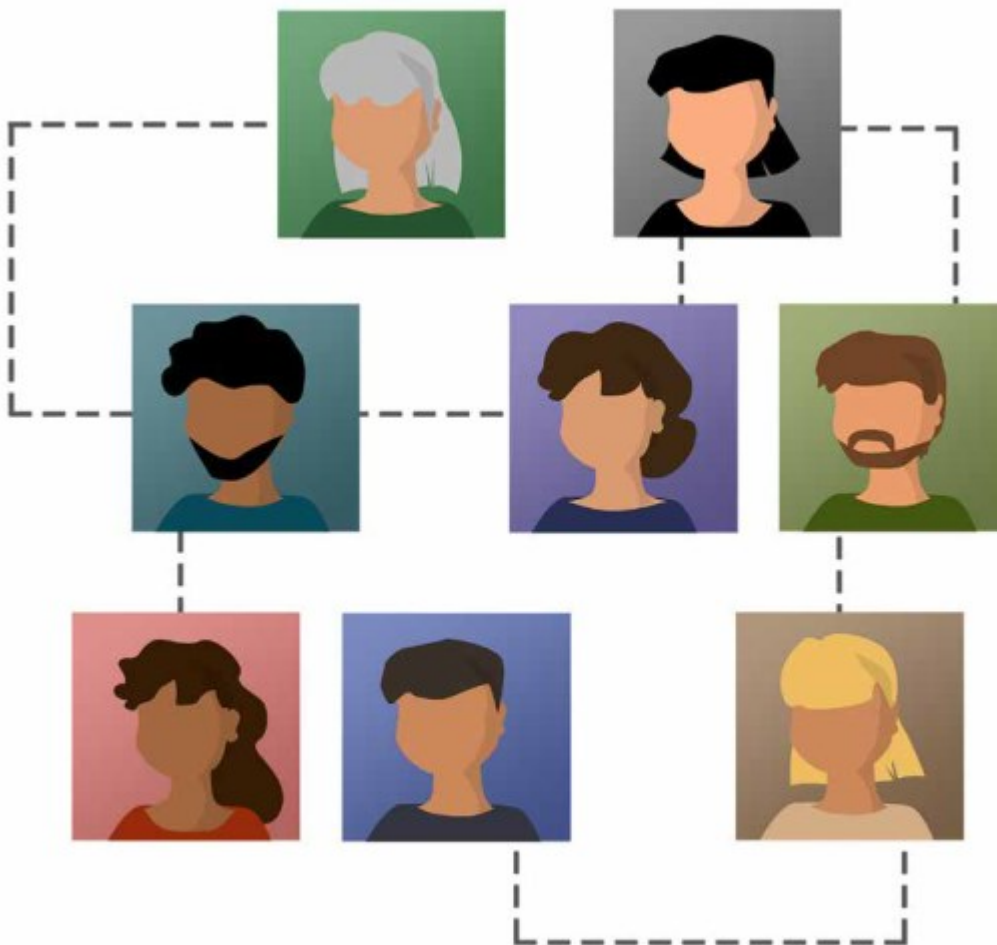


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March 2022 » Columns » Organizing Your Organization

# Organizing Your Organization

Jonathan Gano, P.E., Director of Public Works, City of Des Moines, Iowa; Chair, APWA Leadership & Management Committee



It is tempting for managers to focus on the “big picture” things, the fun stuff, the projects, the politics, or even just the everyday work of public works, and overlook basics of management. It’s actually pretty easy to avoid the basics; in the public service there is always some fire to put out somewhere. Or there will be soon enough, just wait a few minutes for the phone to ring.

One of those basic and fundamental principles of Mastering Management is organization. The most overlooked tool of organization is the humble and often much maligned org chart. Often out of date and either thumbtacked to a bulletin board in the basement or parked on the website a couple years ago, the org chart is hardly ever one of the first things

to come to mind when leaders think about how to best manage their teams.

The organizational chart should be one of your most important ways to make sure your team is doing its best work in the best way. At the most basic level the organizational chart answers some important questions:

- Who does what?
- Who is responsible to whom?

But there is a tremendous amount of power represented in simple boxes and lines on the page that is easily overlooked if one is not thinking carefully about the team and how work actually gets done. It gets done through people, not boxes. Those people relate to each other through relationships defined by that organizational chart.

We, in public works, are almost never starting from scratch. This industry is not a tech startup. Our teams are not a tabula rasa—filling in and growing from founding to the IPO, adding staff and offices as products are developed and new markets expanded. By and large, our service areas are already defined, our budgets and revenues more-or-less fixed, and our team has already been on board, sometimes for quite a few years, if not decades.

Some organizations have been deliberately designed through a top-down municipal shake-up or reorganization driven by faddish management philosophies. Other organizations are just accidents of history, agglomerations of teams and responsibilities stapled together to fit a need at the time, whether that time was five years or five decades ago.

We are almost always filling shoes that someone else has worn for years before us, making decisions with ramifications that last far beyond their tenure.

The closest I've ever come to that blank slate was during my final year at the United States Military Academy. I was chosen for command of a cadet company during the first semester and tasked with organizing my unit, brought back a couple days early from summer military training. All the people were already committed to arriving, as were their ranks within the organization and the rules that went with those ranks. Within those constraints, I was free to assign roles, roommates, and duties as I saw fit.

I spent two entire days doing nothing but building the organizational chart and room assignments. Also, there was nothing else to do.

I thought deeply about personality types, communication preferences, time commitments for those in sports or clubs. Who were the hardest workers? Who wanted a more ceremonial role? Who could work best with strong personalities? Who needed to be close to the office? Who needed privacy most? I knew three-fourths of the people coming but that remaining quarter were wildcards and I needed to be able to accommodate that uncertainty. I balanced class distribution within the allotted building footprint but offset known weak leaders with strong subordinates. Strong leaders got the more challenging subordinates. I thought through every relationship in the hierarchy of the organization down to which plebe got matched up with which second-year cadet. Every single position and room were up for grabs.

It turned out to be the best leadership experience of my life with a team that functioned incredibly well together. Strengths balanced weaknesses. Everything was so easy; it was amazing. I attribute a key chunk of the success of that teamwork to the time I spent thinking through the building of the organization and assignments during those two days of untrammelled thinking. It's amazing what you can come up with when you're a little bored.

We rarely, though, have the ability to do that kind of wholesale arranging of our own workplaces. There's a lot more inertia. But the same principle applies: think through the relationships all throughout the organization. If you're a higher-level manager in a larger organization, make this a team exercise so you bring insight from frontline supervisors that actually know their people the best. Do the thinking collectively, if you must.

In my experience, the only time the org chart gets consulted is when there's a vacancy upon someone's departure or retirement. In the municipal service, changing job descriptions for existing personnel seems deliberately difficult. Probably a hangover from the pre-civil-service reform era when nepotism was rampant and government jobs were not



the open-and-competitive kind that we commonly see now. Rules are there for a reason, we have to remember.

Deep thinking about the org chart forces you to think about relationships. In the two basic questions that an org chart answers, three of the four W's were "who." Your people are your most important asset. How they relate to each other is really the driving force of your workplace. Yes, we all require tools, like computers or backhoes, but without people to operate them, these tools are worse than useless.

Good management means getting the right people to connect with each other in the right way. This is different from leadership but could easily be confused for it. It requires zero interaction with those team members, making it more of a management skill than a leadership skill. It starts with asking questions:

- Do you have the right people in the right role?
- What options do you have in reorganizing?
- How much work is it to change your organizational structure?
- How hard is it to change job descriptions to match either reality or a desired outcome?

Work through all of those questions and determine just how much flexibility you have. It's probably more than you initially think. Undertake this exercise with a team to generate buyin. Pull out your org chart and work two or three levels deeper than you normally would and see if you can't find something that would work better. Your org chart is more than just lines and boxes on a page. It is a representation of the relationships between your colleagues. Use it to think about ways that you can make your team work better together.

*Jonathan Gano can be reached at [\(515\) 283-4950 \(tel:5152834950\)](tel:5152834950) or [JAGano@dmgov.org](mailto:JAGano@dmgov.org) (<mailto:JAGano@dmgov.org>).*

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April 2022 » Columns » Achieving public works goals requires organizing

# Achieving public works goals requires organizing

Kurt B. Lind, MPA, Business Administrator, Office of the General Manager, Mesa Water District, Costa Mesa, California  
Harry Lorick, P.E., PTOE, PWLF, Principal, LA Consulting, Inc., Manhattan Beach, California, member of APWA's  
Leadership and Management Committee, APWA SoCal Chapter President-Elect



Mesa Water employee exercising a valve

The success of a public works organization depends, in part, on organizing—organizing the structure of tasks and coordinating reporting relationships that encourage team members to work toward common goals (Jones, George, & Langton, 2019). This is the second article focused on the crucial function of organizing in the *APWA Reporter's* “Mastering Management” series and considers how this management function can be used to allocate resources and establish a timeline to achieve the goals of a public works organization.

The previous article in the series focused on utilizing a formal organizational tool, the organization chart (Gano, 2022). Whereas Gano (2022) discussed creating and using an organization chart based on a work plan to assign responsibilities, this article considers how this management function can allocate resources and establish a timeline to achieve the goals of a public works organization.



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### Why Organize a Plan?

Mesa Water District (Mesa Water), an independent special district in Costa Mesa, is responsible for providing water service to 110,000 residents in an 18-square-mile service area. To effectively manage their workload and maintain a level of service that meets the needs of their customers, the organization must plan how they are going to allocate their resources for the year. Prior to a new fiscal year, the organization identifies specific goals, based on the Mesa Water Board of Directors' strategic goals, and assigns metrics for accomplishing work for the coming year. Whether measuring the number of hydrants upgraded, water valves to be exercised, or frequency of well motor preventive maintenance, these are generally expressed as estimates.

For many organizations, however, a key element of setting goals and metrics is often overlooked. Goals can only be met if the resources necessary to do the work are available within the established timeframe. The question of resource availability should also be addressed to ensure that the planned goals can be accomplished. Moreover, there is a second element to resource availability. Even if the resources are available in the planned timeframe, employees must be adequately trained, coordinated, and engaged to accomplish the job and achieve the goals.

Of course, even the best planned efforts may be thwarted by unforeseen impacts. Understanding the risks and having a backup plan can mitigate and minimize the impacts. The COVID-19 pandemic, for example, hindered the availability of resources for nearly every organization, including the diminished presence, health, coordination, and motivation of employees and the diversion of resources to other critical tasks. Mesa Water was no different and was able to navigate these uncharted waters efficiently by establishing manageable goals, cross-training staff, and being flexible to staff availability throughout the year.

An evaluation of the organization and its activities could help identify the standards and guidelines to make those operational decisions. The concept and components of a work plan were outlined in a February *APWA Reporter* “Mastering Management” series article by Zeilman and Lorick (2022), providing the logic to understand resource requirements for each activity.

### **Meeting the Goals**

The first consideration in meeting organizational goals and objectives is resource availability. Mesa Water establishes a goal to exercise 50% of its water distribution valves each year to ensure their functionality to operate when they are needed. This means that to set a goal of 2,400 valves per year, management must be able to calculate the number of employees and equipment required to complete this work within the year. This means the supervisor needs certain data including:

- What is the crew makeup that is needed to perform this work?
- How long does it take to exercise a valve?
- When are the crews available to do this work?

In the distribution valve maintenance example, a crew consisting of two Water System Operators and one valve truck is used to complete this work. The activity guideline, or estimates by specially trained employees, can determine what a crew can accomplish on average each day. For example, Mesa Water crews are able to exercise an average of 40 valves per day. The activity guideline also indicates the distribution of this work throughout the year (e.g., the percentage of planned work each month). In this case, distribution valve maintenance is spread evenly throughout the year. Hence, the two-person crew would need 60 days over twelve months, equating to five full days a month, to complete this activity as planned. This is calculated by dividing the total number of valves (2,400) by the number that can be done in one day (40 valves per day). Therefore, with an average of 20 workdays per month, one crew would be needed each month, including .50 full-time employees and .50 of a time for a valve truck for just this activity. Therefore, to successfully achieve this goal for distribution valve maintenance, these resources must be available.

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Even if these labor and equipment resources are available throughout the year, they should be able and knowledgeable to perform the work and, in some cases, require licensure. If the resources do not meet the work requirements, the supervisor may need to provide additional training for employees or request additional funding for equipment from management.

### **What does a manager need to accomplish this?**

The key to accomplishing an organization’s goals is to understand how best to organize resources, especially people, to achieve the identified service level—Determine, Identify, Calculate, Confirm, and Re-Assess as outlined below:

1. Determine what work needs to be done and how often.
2. Identify what labor, equipment, and material resources are needed to do the job once.
3. Calculate the number of workdays throughout the year that would be necessary to achieve the level of service.
4. Confirm that the labor, equipment, and material resources are available and affirm employees’ skills and capabilities to perform the various tasks.
5. Re-assess, or request additional resources as needed to complete the planned work.

A formal structure and process must be put in place to implement this concept. This can be done by assessing and understanding management's expectations and goals, as laid out by the organization's strategic goals, using tools available for projecting resource needs, and applying sound business practices.

For example, computerized Maintenance Management Systems (MMS) are used by many public works agencies to project the annual work needs and establish monthly and yearly goals. By using standard operating procedures or activity guidelines and vital projection scheduling tools, a supervisor or manager can make sure that the department has the available trained staff and proper equipment to accomplish the work that has been scheduled.

## Summary

Organizing is a crucial component for implementing a work plan. The establishment of a complete reporting structure will include identification of resources that are not only required, but available, accessible, and capable to complete the work. Once this is confirmed, work can then be scheduled. The next article in this series will discuss the function of *scheduling* and how the organized plan can be scheduled and resources assigned.

*Kurt B. Lind can be reached at (949) 207-5408 (tel:9492075408) or [kurtl@mesawater.org](mailto:kurtl@mesawater.org) (<mailto:kurtl@mesawater.org>); Harry Lorick can be reached at [Hlorick@laconsulting.com](mailto:Hlorick@laconsulting.com) (<mailto:Hlorick@laconsulting.com>).*

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May 2022 » Columns » Scheduling: The art of getting work done

# Scheduling: The art of getting work done

Jeffrey A. Kramer, P.E., PWLF, Founder and CEO, Ascension Leadership Group, LLC, Queen Creek, Arizona; member, APWA Leadership & Management Committee



Peter Drucker, considered by many to be the father of modern management, once said, “Leadership is doing the right things, management is doing things right.” One of those things we need to learn to do right if we want to get work done is the ability to schedule effectively. This is a critical management skill to master, for as Drucker also said, “Until we manage time, we can manage nothing else.”

Of course, scheduling isn’t just about managing time, and this article isn’t a time management exploration, but one of the basic tenets of managing time in the completion of work is the ability to schedule effectively. In this article we’ll cover a variety of scheduling aspects related to project-type work, including the basics of scheduling, how to develop and manage schedules, and various resources to help with doing that. So, let’s get into the art of getting work done, or scheduling 101.

## Scheduling Basics



What exactly is a schedule? In its simplest form, a schedule is really just a plan to get certain tasks done at a given time. In our industry, though, we recognize that few of the things we need to accomplish on a regular basis are really that simple.

On a deeper level, a schedule is a set of interconnected tasks or activities controlled in such a way that the beginning and ending dates of each are planned to ensure that the resources needed to complete each activity are made available when and for as long as needed in order to complete the overall work required.

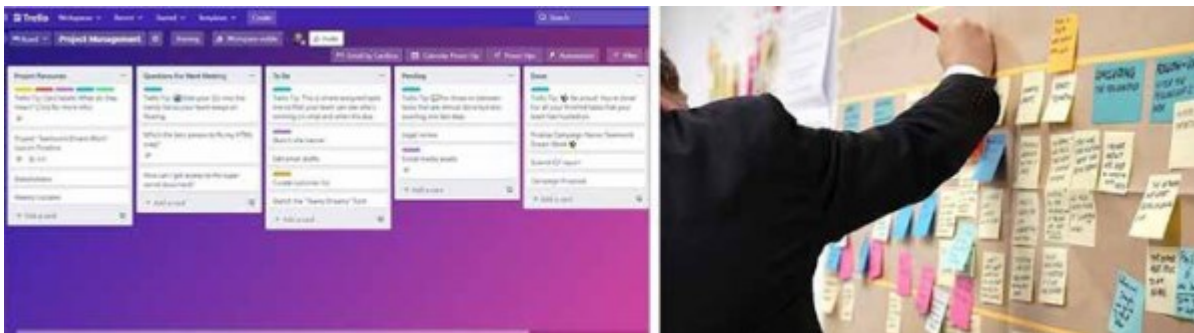
Whew—that's a mouthful! And, to be an effective manager, a necessity to understand. But just how do you go about figuring out everything you need to include in order to create, manage, and execute an effective schedule? For that, let's go back to the simple start— you have to know what you are trying to accomplish, and when you need it started and completed. Then we go from there to choose the type of schedule, develop and manage it.

## Types of Schedules

There are a multitude of ways that you can represent a schedule, ranging from the very simple to the very detailed. Which type you use really depends on what you are scheduling, and your purpose for having the schedule to begin with. In typical small maintenance operations, like replacing a curb ramp for instance, a schedule might be as simple as a weekly assignment board and your work order system. But for a major capital construction project, like building a new fire station for your community, you may need a more detailed schedule in order to monitor the architect's and contractor's progress and compliance with contract terms. In some cases, you may even go as far as defining standard activity names and numbers so that you can provide multi-project or program-wide reporting on similar activities, for example in the delivery of a full capital improvement program.

Here are a few commonly used options for schedule types:

**Your Calendar and To-Do List:** A schedule can be as simple as placing entries on your calendar or to-do list with reminders and task specifics about what will be needed, when to start, and due dates entered. This approach might apply to simple assignments like a one- or two-day task, or routine, repetitive activities.



Examples of Kanban scheduling approach

**Kanban Board:** More popular in the manufacturing and tech space than in public works, a Kanban Board is simply a visual process for moving tasks from planning or to-do through in-progress and done by using boards and cards. In my experience this approach works great for tasks that are not schedule critical, and where the progression of tasks in relation to each other is not as rigid. While there are software programs to do this, such as Trello or Asana, it can be as simple to accomplish as sticky notes on the wall being moved from one area of progress to the next as tasks progress. I've come to love my Trello boards and use them extensively for personal projects and individual team member or client collaborations.

**Schedule Logic:** Once you have listed out all the items for your WBS, the next step is to organize them into the order in which they need to be performed. Just like your WBS, your logic can be as simple or as complex as you want to make it. The relationship between the different tasks is where things like predecessor/successor ties, meaning what needs to be finished before another item can start, and lags or time delays between activities come into play. When you consider our simple curb ramp replacement assignment you might have only a handful of tasks that occur one after the other. Construction of our new fire station, though, might have hundreds of tasks in both sequential and overlapping order,

some of which affect each other, and others that don't. In Kanban this is where your boards (columns) come in, as they represent the progression from start to end, whereas in CPM the logic ties and lags are required elements for a valid schedule. The key to your logic is this—have one start and one finish, and in between every item should flow logically from the start to the finish.

**Resource Loading:** For a simple assignment the resource loading step can be pretty easily overlooked, but the more complex the work is, the more important this step becomes. In recent times the process of actually resource loading a schedule has become less frequent, but tying resources to schedule activities remains an important function. These resources include People, Equipment, and Materials & Supplies. Maybe you've heard of "just-in-time" delivery, which is more common in the manufacturing world than in public works, but it's essentially the same thing we're talking about here—the process of making sure that everything you need to complete the work is available when you need it and for as long as you need it. You are making sure that the motor grade or backhoe will be available, or that the concrete is delivered from the batch plant, and that the crew members who do the type of work you need done are there on the right days, all so the work isn't delayed beyond an acceptable time.

### **Managing Your Schedule**

Once your schedule is developed and the work begins, it's time to manage the schedule, which means you need to track each activity on your schedule to show its progress. For calendar and to-do list entries that's as simple as marking things complete, while for Kanban-style schedules it means moving the cards from one board to the next as the activities' status changes from not started to underway to done (or whatever board definition you decide to define). CPM schedules tend to be more demanding, as each lineitem task needs to be updated when it starts and ends, and for longer tasks you might need to provide intermediate updates in the form of estimated completion percentages.

Mastering this critical management skill will pay huge dividends.

The real value in actively managing your schedules comes when a project falls behind. A well-developed and managed schedule allows you to create recovery scenarios to get back on track, to report accurate information about expected dates when work will occur or finish to your management and elected officials, and in the case of contracts, to hold your vendors accountable and enforce bonuses or penalties when your contracts include such provisions.

### **Conclusion**

As you can see, scheduling is a pretty comprehensive topic, covering everything from employee workdays and times to meetings to project work. Mastering this critical management skill will pay huge dividends, though, as it is an integral part of our work. We only scratched the surface in this article. For more information, CPM scheduling courses can be found on Udemy, Coursera, Class Central, or LinkedIn Learning. The Asana Academy has lots of free Kanban training, and both Trello and Asana offer free accounts. Let's get scheduling!

*Jeffrey A. Kramer taught the CPM scheduling module for the CMAA Professional Construction Manager course for several years. He can be reached at (602) 796-7846 (tel:6027967846) or [jeff@ascensionlg.com](mailto:jeff@ascensionlg.com) (<mailto:jeff@ascensionlg.com>).*



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June 2022 » Columns » To Delegate or Not to Delegate

# To Delegate or Not to Delegate

Bill Stogsdill, CPM, CPWP-M, PWLF, Director of Public Works, City of Fairway, Kansas; member, APWA Leadership and Management Committee; Kansas City Metro Chapter Delegate



As part of the Leadership and Management Committee’s “Mastering Management” series for 2022, we will be focusing on all aspects of management.

Scheduling is a critical aspect of management, and this article will focus on one of the biggest and most difficult aspects of scheduling—delegating.

The Merriam-Webster dictionary defines delegate as this:

## **delegate (verb)**

delegated; delegating

### ***transitive verb***

- to entrust to another
- *delegate* authority
- *delegated* the task to her assistant
- to appoint as one’s representative

### ***intransitive verb***

- to assign responsibility or authority
- a good manager knows how to *delegate*

Leadership author John Maxwell once stated, “If you want to do a few small things right, do them yourself. If you want to do great things and make a big impact, learn to delegate.”

Delegation can be very difficult, especially for new managers. Eli Broad, American businessman and entrepreneur said, “The inability to delegate is one of the biggest problems I see with managers at all levels.”

In doing my research for this article, I came across this very helpful list that was published in the *Harvard Business School Online* in an article written by staff writer Lauren Landy in January 2020. She identified these nine ways that you can start delegating more effectively:

1. Know What to Delegate
2. Play to Your Employees' Strengths and Goals
3. Define the Desired Outcome
4. Provide the Right Resources and Level of Authority
5. Establish a Clear Communication Channel
6. Allow for Failure
7. Be Patient
8. Deliver (and Ask For) Feedback
9. Give Credit Where It's Due

### **Know What to Delegate**

Not all tasks can be or should be delegated. This will take some trial and error to hone in on what works for you and your staff. A few examples of tasks that should/could be delegated are:

- Routine, repetitive, or reoccurring-type tasks
- Tasks that would build a skill set in staff
- Tasks that your staff are more skilled in
- Tasks that staff might find fun or interesting

### **Play to Your Employees' Strengths and Goals**

Every employee has strengths and weaknesses; your job is to know them. As tasks come up you will get a feel for which tasks should go to which employees based on their skill set. Don't set employees up to fail by assigning a task to an employee without the proper training or knowledge to complete the task.

Goals are another good way to delegate tasks to the proper employee. Perhaps you have an employee who has a goal this year of improving their writing skills, so you assign them to write an article for the company newsletter.

### **Define the Desired Outcome**

You need to clearly define what the final product/outcome is and what the timeline is. Give clear direction, and then ask for confirmation that the direction was understood as intended. This is NOT micromanaging. Defining every step of the path is micromanaging; providing the destination and letting the employee map the path is not.

### **Provide the Right Resources and Level of Authority**

Giving employees tasks that they do not have the tools or authority to complete is setting them (and by extension you) up for failure. This will frustrate you and the employee who you have given the task to. Making sure that staff are equipped resource wise and training wise, and have the authority to complete the assignments that they are given, will go a long way to assure team success.

### **Establish a Clear Communication Channel**

Questions or changes will always happen mid-task; it is the nature of public works. We adapt and improvise to work through it. Establishing a clear communications channel will give the employee a level of comfort knowing whom they need to go to for answers to questions that may arise.

### **Allow for Failure**

This is difficult, but people learn from their mistakes. As long as it not critically detrimental to the task, employee or organization, a degree of failure will help employees grow and learn. Failures are also great teaching moments for your organization. Catastrophic failures are teaching moments for all organizations—avoid these.

One of my favorite quotes about failure belongs to Thomas Edison. There are seemingly endless versions of it, but it goes something like, “I didn’t fail 2,000 times; I found 2,000 ways how not to make a light bulb.”

### **Be Patient**

The first time an employee takes on a new task it will take them a little longer to complete. This is normal. Employees will need to find their own way to complete the task as efficiently as possible. As a manager you need to let them, but you should still be accessible if they have any questions.

### **Deliver (and Ask For) Feedback**

Feedback should be a two-way street. If a task was not completed as assigned, you should offer up some constructive criticism on what could’ve been done to bring in the task to the pre-set parameters. If a task was done well, positive feedback is earned and should be provided.

Conversely, you should ask for feedback from the employee on what they thought of the process and what you could’ve done differently to make the task go smoother. Be prepared to hear constructive criticism, but it’s okay, it will help your team grow.

### **Give Credit Where it is Due**

When the task or project is complete, and it was successful, recognize those who worked on the task/project publicly. Personally call out those team members in front of their peers and especially in front of higher-ups and elected officials. Public recognition is an easy way to build confidence in the team.

### **Conclusion**

This checklist is a great example of things you could go over mentally before delegating any tasks. This is another tool to add to your toolbox, but with all tools, it needs to be adapted and right-sized for your duties and organization. I will leave you with a couple of quotes:

David Ogilvy, hailed as the Father of Advertising, once said, “Hire people who are better than you are, then leave them to get on with it...Look for people who will aim for the remarkable, who will not settle for the routine.”

General George S. Patton stated, “Don’t tell people how to do things, tell them what to do and let them surprise you with their results.”

*Bill Stogsdill can be reached at (913) 722-2822 (tel:9137222822) or [bstogsdill@fairwaykansas.org](mailto:bstogsdill@fairwaykansas.org) (mailto:bstogsdill@fairwaykansas.org).*



July 2022 » Columns » Making better decisions

# Making better decisions

Anthony Smith, Interim Water Resources Division Manager, City of Livermore, California



Your impact as a public works manager is directly related to the quality of your decisions. You make decisions every day by answering tough questions.

But no matter how many decisions you make, you can always improve your ability to make decisions. There is no one right way to make decisions, but there are many thoughtful ways to improve your process.

## **Reframe your view of decision making**

We have been wrongly taught to see desired outcomes as good decisions. But decision making should be viewed as a process, not just an outcome. Making a good decision means following a thoughtful process in which you weigh the positives and negatives, ask tough questions of yourself and your team, and consider different perspectives. The speaker and author Seth Godin has said, “Outcomes and decisions are unrelated. Odds are good decisions lead to good outcomes. But if you have a great outcome, that doesn’t mean it was a good decision.” Following a robust process will result in good decisions, even if the outcome is not ideal.

## **Reflect on how you make decisions**



To become a better decision maker, it is important to understand how YOU make decisions. Self-reflection is a powerful tool for growth when applied with an open mind. Thinking critically about how you made a decision and why you did it that way can be very eye opening. And, just like my threeyear-old daughter, try asking “Why?” a few times in a row. It’s amazing how quickly you can cut through the fluff and get right down to the heart of the matter.



Pause here for a moment. Think of a recent decision you made. What was your process? Why did you do it that way? How did you take in outside information and perspectives? How do you now feel about the process?

### **State your biases**

Decision making is usually achieved through a combination of intuition and critical thinking. And since you will use your intuition, it’s important to interrogate your own biases. A good friend of mine almost always starts discussions of contentious issues by stating his biases. At first, I thought it was odd. But, as with most wisdom, eventually I came to see the value of it. By acknowledging your biases, it can free you to look deeper into an issue and be more open to rethinking.

### **Rethink your opinions**

The organizational psychologist Adam Grant wrote a fantastic book titled *Think Again: The Power of Knowing What You Don’t Know*. In it, he encourages us to think like a scientist instead of a preacher (no proof required), prosecutor (tons of training required) or politician (no training required). The scientist is open to being wrong (even excited by it), seeking new knowledge, and rethinking their own beliefs. “We’re swift to recognize when other people need to think again. We question the judgment of experts whenever we seek a second opinion on a medical diagnosis. Unfortunately, when it comes to our own knowledge and opinions, we often favor *feeling right over being right*... We need to develop the habit of forming our own second opinions.” (Grant 18) The ability to rethink opinions can help us all see more clearly.

### **Seek out feedback**

Another useful tool is asking for feedback on your decision-making process. I like to state what my thought process is, out loud, to a colleague and ask for feedback.

Am I missing something? Is my conclusion reasonable? Do you see it differently? Feedback can be difficult to ask for, and sometimes difficult to receive. Showing vulnerability can be scary but you will never grow without getting feedback from others.

### **Study the process**

Another method to improve is to study the decision-making process of others. There is a myriad of useful books, YouTube videos, magazine articles, and more to help you collect different ways of looking at decisions. Look for resources from people like Simon Sinek, Brené Brown, Seth Godin, and Adam Grant. There are people near you who are probably pretty good at making decisions. Seek them out. Ask them questions.

### **Involve your team**

As the hosts of Marketplace's Make Me Smart podcast say, "None of us is as smart as all of us." As managers, we will never have anywhere near the sum of the experience, lessons learned, failures, successes, and perspectives that our teams have. So use it. Ask your team for their perspectives. Ask them if you are missing something. Help guide the team through the process rather than just "making the decision."

Every one of our organizations has a mission statement (if you don't, it's time to get one). Your mission statement can help you and your team make better decisions by reminding you of what is most important to the organization. Discuss the mission statement with your employees and coworkers. Ask them what it means to them and how you can all apply it to your work.

Encourage your teammates to talk through decisions with others or with you. Give them guidance, but don't try to jump to an answer. Try channeling Socrates by asking probing questions. Set the stage by making sure they understand that there is no single right answer, and nothing is off the table during the discussion. The goal here is to get people to think about how they make decisions.

Provide feedback to your employees by telling them that they've made a good decision when the process was thoughtful. Ask them to revisit and rethink decisions that didn't turn out the way they hoped. Ask them to critique the process and inputs.

### **Conclusion**

Decision making has an incredible impact on your organization, the people in it, and the community you serve. Focusing on the process instead of the outcome can help build a healthy decision-making culture. Reflecting on how you make decisions can help you find better ways. And rethinking your opinions and involving your team can help you grow. Good luck on the journey ahead!

*If you would like to discuss this article, Anthony Smith can be reached at [awsmith@livermoreca.gov](mailto:awsmith@livermoreca.gov) (<mailto:awsmith@livermoreca.gov>) or (925) 960-8100 (tel:9259608100).*

### **Citations**

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August 2022 » Columns » Yes, it takes work to control and improve

# Yes, it takes work to control and improve

Roger Cox, P.E., Senior Professional Engineer, Hillsborough County Public Works Department, Tampa, Florida, and member of APWA Florida Chapter's West Coast Branch; Harry Lorick, P.E., PTOE, PWLF, Principal, LA Consulting, Inc., Manhattan Beach, California, member of APWA's Leadership and Management Committee, and APWA SoCal Chapter President



Hillsborough County mower that is monitored and accounted for productivity and time

Continuing with the 2022 series on Mastering Management, this article is on the fourth management function: controlling/improving. The previous month's article describes decisions through a thoughtful process that transitions from scheduling and assigning to performing work. First, a little background is provided on this function. Next, this article addresses the concept and outlines how a manager can take primary planning, organizing, and scheduling functions and make them work. It should be noted that these first three management functions are crucial and critical to program success.

The final step in the work process is called "controlling." This step involves monitoring and reporting what work is accomplished; the tools used to monitor and report covered in this article. It follows that a critical question must occur after the work is done. That question is: Are the quality, schedule, and productivity goals being completed, and what

can be done along the way to ensure that targets are met?

## **Controlling**

Controlling is a function that focuses on monitoring the work effort through reporting accomplishments and recording the resources used. The accomplishment or work units completed (i.e., acres mowed, signs installed, permits issued, etc.) are compared and contrasted against the expected goals as well as the resources assigned and planned to produce that outcome. This way, management can create a transparent work plan that outlines what is to be accomplished and provide aid and guidance as the work progresses to help the organization reach the planned goals. The ambition of controlling is not for management to create a stick or trap that celebrates failure, but to embrace the risk associated with all work and help the organization attain a planned and agreed-upon goal through an open dialogue of honest and meaningful continuous feedback. This includes pioneering innovative ways of aligning all available resources using analytics to make decisions that yield the best service to the public and elected leaders.

When it comes to controlling, the tools are the reports, dashboards, or analytics that an organization uses to track and report progress.

Successful managing requires processes and tools to ensure that the plan is implemented and works. When it comes to controlling, the tools are the reports, dashboards, or analytics that an organization uses to track and report progress. Each organization implements the processes, but they will revolve around communication. The communication link between management and production staff is vital. This fluid link must be established and supported by upper management to succeed. The explicit linkage and understanding of the plan and the associated goals thread from the front-line staff (who deliver the work), their immediate supervisors, lower management, upper management, and director levels. This openness allows for complete transparency with no misunderstanding of the objectives. For example, the *controlling* element can be administered by almost any level of supervision. Still, in most cases, it should be applied at the level closest to the work while upper management tiers see an overview or roll-up of the information. Directors or senior managers need to understand the process. Still, they are often far removed from the work details to provide communication feedback for implementation adjustments. Yet, they must be familiar with the generated analytics to provide leadership guidance.

## ***How Controlling Works in Practice***

The best way to see controlling in action is to utilize a relatable example. So, let's use a typical public works example, roadside mowing. In addition, this concept could be applied to almost any activity, such as traffic signal maintenance, permit issuance, plan reviews, or sewer line cleaning.

We utilize the process, tools, and steps needed to achieve the desired results.

For this mowing example, an agency knows how much roadside turf it maintains. The plan is to mow the grass six times a year, with the mowing season being from April to November. The agency has an established goal of five acres per day to accomplish the planned six cycles per year in the growing season. The planning, organization, and scheduling functions have previously established the mowing crew size, their positions, salaries, available hours, expected work standard, and equipment needed.

How do we ensure that the goals and plans are met? First, we utilize the process, tools, and steps needed to achieve the desired results.

The steps of this process include:

1. Record the production and costs – the agency must account for what is done and track the work, resources used, and productivity achieved. Thus, they must account for the employee's time expended, hours of all equipment used, the area covered, the location, and the number of acres mowed.
2. Summarize the data – the data must then be summarized and compiled to understand the analytics.

Actual – One Month Production

Labor – 20 Days, crew of four

Production – 94 acres

Cost – \$9,400 (material, labor, and equipment)

Calculated Daily Production – 4.7 acres (90 acres/20 days)

Estimated Units Cost (includes material, labor, and equipment) – \$100/ acre (\$9,400/94 acres)

3. Compare plan vs. actual for the activity – Once the production data is known, it can be compared to the identified goals.

Planned – One Month Production

Labor – 20 Days, crew of four

Planned Production – 100 acres

Cost – \$8,000

Calculated Daily Production – 5.0 acres (90 acres/20 days)

Calculated Units Cost (includes material, labor, and equipment) – \$80/acre

4. Identify variance – variations are compared to the plan and identified with attention on the difference in time, productivity, and unit cost.

5. Check for changes from the planning efforts – specific locations (actual), crews, and times of the variation should be identified and compared against what has established the primary functions of planning and organization. This way, the actual production measured is verified as an “apples to apples” comparison. Let’s look at our example:

The mowing production reported indicates the acres serviced; it does not suggest that the acres mowed were at the same locations as identified in the original plan. In addition, the mowing crew’s route may have changed, resulting in a disruption in the work.

6. Determine factors for variance – results are reviewed and examined to understand and explain the reason for the variance (good or bad). Let’s look at our example:

The crew mowed 94 acres in a month and *did not* meet the 100 acres per month goal. As a result, their daily production was down on average for the month by approximately 0.3 acres per day, and the unit cost of mowing exceeded what was expected.

An explanation for the production loss could be that the mowing work was done after heavy rain making it harder to achieve the desired productivity, or there was excessive trash that had to be picked up before mowing by the crew.

But what about the cost? It is possible that the makeup of the crew was altered, or the crew used different equipment that was not as fast at mowing (slowed production) although cheaper to operate (tractor vs. zero turn). But, again, the reporting tools only provide data that raises questions for examination and explanation.

Management’s responsibility is to investigate and determine the reason for the variance and be ready to discuss that variance intelligently at the Plan vs. Actual communication in a production meeting.

7. Review results – these results are reviewed with the manager and those performing the work. A report or presentation of these values would be outlined in a group discussion of critical parties.

8. Determine action plan – actions are then prepared to align the work to the goals. This may require resource enhancement training and/or better crew management. In our example, rescheduling mowing to the area more easily mowed in a dryer environment to meet compliance and then returning to mowing the other wetter places later or dispatching a litter crew to address the trash issue. Of course, this action of more resources increases the size of the crew, which affects cost. But the increase in production may offset that cost. In any case, exploring and discussing means to re-align production to the plan is the goal.

9. Benchmark – data compares industry benchmarks and staff experience with other agencies. This requires looking at neighboring agencies, DOT data, and industry benchmarks of mowing. These are more for long-term planning and use in the projection of resources. Benchmarking is a valuable tool to gain comfort with production numbers. Care must be used to develop benchmark data relative to a specific case. In our example, if we were mowing in Florida, it might not be appropriate to benchmark data from the Alaska Department of Transportation or even an agency's parks department. It is essential to attempt to benchmark “apples to apples.”

10. Adjust the plan – plans can be adjusted as necessary to reflect the historical results. However, the initial plan (usually done annually) should NOT be changed during the year. Altering an annual plan during the year will nullify the purpose of setting goals and proper planning. In our example, if the yearly plan is adjusted so that the production number is simply decreased to match the actual production, the investigative efforts to discover variances would become unnecessary. The crews would no longer have a meaningful target for work effort, and the ability of management to challenge the workers with higher goal setting would be lost. Remember, the plan is just a plan.

This ten-step process should be done systematically throughout the year, involving the managers and line staff.

If, after a year's efforts, it is found that the latest goal was a bit lofty and unlikely even with enhancements to be achieved, then next year's plan should reflect the lesson learned. But without investigating the variance step, adjusting the following year's plan to hone in on the production number is not doable. Using the work history over a year, change the metrics for good practices to update next year's plan. This would allow an annually adjusted program based on desires using actual data. This is a continuous improvement cycle that provides for good practices with analytics.

This ten-step process should be done systematically throughout the year, involving the managers and line staff. To assist in this process, a structured and systematic meeting is suggested to review the results.

### ***Plan/Actual Meeting***

This meeting is intended to clarify work progress and address production problems at an early stage so that the overall goals of the programs do not fall behind. This meeting should be held at regular intervals. Monthly seems to be optimal for work plans and annual programs. Reviewing the periodic accomplishments of the work production teams is essential and understanding that communication is the lifeblood of the controlling function is vital.

This meeting should be structured, always start on time, and have ground rules for communication. Cross talk and sidebar conversations can be very disruptive. This structure will help alleviate meeting anxiety some people experience when speaking to peers or management. The meeting attendees should be all of the representatives who oversee the work that is accounted for in the reporting tools.

The information should focus on improvement and guidance of progress. The process is not a hammer or Big Brother watching but a tool to help staff continuously improve. Of course, those who do not meet desired goals may require some direction, training, and or guidance.

### ***Continuous Improvement***

This final step in the controlling process is an improvement function with a feedback loop to the initial planning function for future periods. It performs, tracks, and monitors the effort to determine if it complies with programs, policies, guidelines, and goals and identifies what actions need to be taken to get on track. Next, how an action is performed is examined and compared for improvement on an ongoing basis. This involves reviewing completed work versus desired

results and adjusting the work effort by reallocating resources, training, or restructuring. This can be enhanced by using internal and external benchmarks to identify how the agency compares with peers and use that assessment for ideas on how the agency can improve.

A transparent process must be in place to adjust to changing environment.

Annual adjustments to plans can only be accomplished by first trying to attain the desired production numbers and then adjusting. The reason for modifying production numbers up or down will vary. In our example, imagine that we discovered that throughout the year, the 0.3-acre daily deficit was consistent. This was discussed with the crews to look for a solution. The mowing crew having to deal with much litter on the rights-of-way before mowing impacted the goal attainment. Toward the end of the year, the agency created a litter pickup contract to assist the crew, and production rates now exceeded the current plan. Therefore, next year's plan will use an even higher production rate, which will result in seven mowing cycles instead of six, but the contractor's cost must be added. This was discussed with upper management, who allocated the funds for the contract, which is expected to produce a higher level of service for roadside mowing in the coming year.

### **Support from Senior Management is Essential**

A commitment by senior management that this process is what they want to occur is paramount for success. A practice that requires this accountability can create staff conflict. It also will start staff focusing on being productive and proactive which can be an issue for leaders who want a more responsebased operation with a "laissez-faire" approach to improvement and accountability. Second, staff need to understand the use of the method and rationale. For a strategy to work, you need "buy-in" and commitment to the procedure by the working supervisor and line staff. Third, an automated system with analysis tools is required to compile information and provide analytics. This system should be accessible and understandable so that the team, from senior management to front-line supervision, appreciates and understands the analytics without needing a data scientist to interpret information.

### **Conclusion**

This step is the last one in the management process. It is hard to do and takes diligence, commitment, and grit. So many functions are essential, yet one must check to see what they all need to occur, if not, why, and what should be done. A transparent process must be in place to adjust to changing environment. The process must be documented and supported by front-line workers as well as senior management. Finally, the results should be provided to the elected leaders and available to interested citizens. This process can migrate an organization from 80% response and 20% planning to 20% response and 80% planning. This results in an agency that efficiently and effectively responds to customer needs while at the same time optimizing life cycle asset costs. The next article in the series discusses how we staff these functions with capable and motivated people to make all of these processes work.

*Roger Cox can be reached at [CoxW@HillsboroughCounty.org](mailto:CoxW@HillsboroughCounty.org) (<mailto:CoxW@HillsboroughCounty.org>); Harry Lorick can be reached at [Hlorick@laconsulting.com](mailto:Hlorick@laconsulting.com) (<mailto:Hlorick@laconsulting.com>).*



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September 2022 » Columns » Reviewing your employees

# Reviewing your employees

Elia Twigg, PE, Principal Engineer, Lantic Solutions LLC, Satellite Beach, Florida; Chair, APWA Leadership and Management Committee



Picture this, you are sitting at your desk checking emails and then...there it is...that dreadful email from your Human Resources Department: It is time for Performance Reviews...[sigh]. If that is how you feel, you are not alone. Performance reviews take a lot of time and energy to do, especially when it has been a year and you have nothing documented over the last year to help you out. But to be fair to your employees, many people want the feedback. And maybe the review means a potential raise for the employee.

So how do you get around it? Well, you probably can't, but you can make the performance review less painful with a better process. My recommendation? Use the 5 FOCUSED Conversations. Employees should always know where they stand, a performance review should simply be a documented recap of their year with no surprises, and these 5 FOCUSED Conversations will most definitely get you on the right track.

During my time as a Public Works Director, Ignite Global hosted the Mind Reading for Managers course for the Public Works managers and supervisors. The concept of the 5 FOCUSED Conversations came from that training, and it is valuable for all teams, big or small. The topics of the 5 FOCUSED Conversations include Feedback, Objectives, Career Development, Underlying Motivators, and Strengths.

Providing feedback and discussing objectives should happen regularly, as in no less than monthly. Discussing career development, underlying motivators and strengths can happen quarterly since interests for these topics don't really change monthly. In fact, you can pick one each month in addition to providing feedback and discussing objectives and you now have your schedule.

These conversations can help provide the content for your employees' performance reviews, so all you would need to do is summarize a few things from your conversations and voilà, performance review DONE! In order for this to be successful, your 5 FOCUSed Conversations need to be documented.

The 5 FOCUSed Conversations are described below:

**Feedback:** This conversation allows the manager/supervisor to give feedback to the individual by telling them how they are doing and to praise them. But the important part of this conversation is to give them a voice as well. Creating this two-way conversation will go a long way and will give your staff member an opportunity to open up, and perhaps share what is working and what is not. This is also an opportunity to share news or updates on things going on in your organization.

As a manager/supervisor, it is necessary to provide feedback to your employees. How can anyone improve or make changes if they didn't know it was an issue? This happened to me. My supervisor was frustrated about something that happened, and during that conversation, many other things came up that were becoming a problem for her. They were a lot of little things that were easy fixes, but I had absolutely no idea until we discussed it. I made a conscious effort to make the changes needed and made sure to ask for feedback at our monthly meetings to avoid that built-up frustration from happening again.

**Objectives:** This conversation allows the manager/supervisor to review goals, objectives, and accomplishments, as well as to help define expectations, and hold the staff member (yourself included) accountable. Common excuses you may hear or actions you will see if they are not holding themselves accountable include saying "it's not my job," ignoring or denying the issue, pointing fingers or blaming others, waiting to see what happens, or confusion/tell me what to do. Correct that behavior immediately.

If employees are not performing well, it is the manager's responsibility to sit down with the employee to talk about what is going on, and perhaps develop a performance improvement plan to get the employee back on track. Don't be afraid to ask why they are not meeting their objectives, or ask if there is anything you can do to help them. Maybe they are overwhelmed and have too much on their plate, or maybe there are some personal issues affecting their work. If the employee continues to not meet their objectives, then it may be best to give them an opportunity to be successful somewhere else.

**Career Development:** This conversation is often overlooked, but is very important. Either the manager/supervisor feels they know what is best for the employee, or they may be afraid of what they will hear. For example, the person may desire to be a teacher, yet they are working as the operations manager in your organization. The bottom line is the more the manager/ supervisor can help the individual achieve their goals, the happier and more productive the employee will be.

Get the conversation started by asking two simple questions: "Where do you see yourself in three to five years?" and "What can we do to help you reach that goal?" By having this conversation, you can plan special training or workload based on what they say, which will in turn, create a trusting relationship with your staff member. They will feel like you care about them and their future. Maybe the person that wants to be a teacher can be fulfilled by giving trainings in your organization— a win-win! But you would never know unless you asked.

I used to have this conversation quarterly, and this proved to be such a success! My operations manager told me that she desired to be the engineering manager one day if that position became vacant. Well, a few months later, the engineering manager left and I felt stuck, but then I remembered the conversation I had with my operations manager! This switch happened and it was one of the best decisions in our organization.

**Underlying Motivators:** Knowing what motivates your team, or individuals on your team, can help your team generate more innovative and creative ideas, and may result in higher-level performers. Give your team autonomy, tell them what the end result is and allow them to self-direct and make independent decisions to get to that end result. Allow them to

master their skills by giving them training or support to make them better. Give them a sense of purpose; if their job allows them to feel like they are contributing to the organization, then they will continue to perform.

Strengths: Knowing what tasks makes your team members excited is crucial to the success of your organization. When an individual works on something where they feel confident, or where they know they will excel, then that may lead to getting more done successfully.

I hired a manager from the police department to fill a vacant manager position in my public works department. His strengths were definitely with emergency management with all his training, and he loved it. That responsibility fell under our assistant director's role; however, she was not as strong in emergency management. Budgeting fell under his responsibility, but that was not his strength. So, what did we do? We switched the responsibilities—he started doing emergency management and she started doing budgeting. We catered to their strengths by making that switch, and the employees felt empowered and they both excelled tremendously in those roles.

### **Putting it all together**

Performance reviews don't have to be a painful process. By having these 5 FOCUSed Conversations, you will be more in touch with your team, and they will know that you care about them and their futures. Managing people is a skill, and skills can be learned. If you struggle in this area, reach out to me. I have some tools that can help you be successful. Good luck and start your conversations!

*Elia Twigg can be reached at (321) 413-0046 (tel:3214130046) or [eliatwigg@lanticsolutions.com](mailto:eliatwigg@lanticsolutions.com) (<mailto:eliatwigg@lanticsolutions.com>).*



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October 2022 » Columns » Staffing

# Staffing

Chris Anderson, ASCT, CPWP-M, Public Works Manager, City of West Kelowna, British Columbia; 2021-22 President, British Columbia Chapter; member, APWA Leadership and Management Committee



As part of the Leadership and Management Committee's ongoing "Mastering Management" series for 2022, this staffing article is further to the September article that focused on performance reviews written by fellow LMC member Elia Twigg. In particular, I have chosen to focus on the following two key elements from the staffing section of the APWA's Mastering Management poster created in consultation with the LMC:

- Managing the workplace
- Hiring, onboarding, and retaining

Side note: For context with this article, it should be noted that my entire career (18 years in public works) has been with local government in a unionized environment for the City of West Kelowna, British Columbia.

## **Staffing – Managing the Workplace**

As directors, managers, and supervisors in the world of public works, we all recognize that our jobs can often be unscripted and reactionary. But this section of the article isn't going to focus on the "emergency management-type" components of our roles; rather, it is going to take a quick look at some of the basic tools that we, as public works leaders, use and implement as we manage our workplace on a day-to-day basis. In many, if not all cases, I am sure that I'm not the only public works professional who is very thankful for the help, support, and guidance that is received

from our Human Resources Departments. They are a critical component to managing the workplace effectively, and if you are not already fostering this relationship, I'd suggest that you work towards getting to know your HR professionals now as they will be a key stakeholder in the management of your workplace.

Source: <https://bit.ly/3Kd0NJM>

Here's a snapshot of three tools that will help you manage your unionized workplace:

**1. Collective Agreement/Contract Administration:** The collective agreement is typically the backbone of a unionized environment.

It sets out a full range of instructions or "rules of the game," so to speak. A collective agreement can speak to items such as management rights and discrimination, strike and labor relations, bargaining, personnel files, grievances, filling vacancies, seniority, breaks, hours of work, overtime and premiums, vacations and absences, pension, severance, safety, wages, etc. This list can be much longer depending on the organization, and collective agreements aren't always perfect, but a collective agreement is one of your basic management tools. Get to know the collective agreement well as you will likely use it and reference it regularly. Knowing your agreement well will help you be as consistent as possible when it comes to the contract administration of your team. Whether it be for an easy or tricky situation, the collective agreement is probably your starting point for every union-related situation that you might have to deal with. The language within this document should hopefully help guide you through the ups and downs of managing your workplace in a consistent and fair manner.

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**2. Job Descriptions:** Another key tool that is used in a unionized environment are the job descriptions. If you are a public works leader, you'll want to pay particular attention to these important documents. A well-thought-out and written set of job descriptions will serve you, your team, and your organization well. Job descriptions can be prepared and adopted (in consultation with your union) for each unionized role in your organization. Job descriptions will set out the skills, abilities, tasks, requirements and level of pay for the various roles on your team.

Source: <https://bit.ly/3cinkrZ>

Clear job descriptions should hopefully provide you with the clarity you'll need to help manage your workplace.

**3. Safety Policies/Procedures:** All employees of your organization have the right to a safe workplace.

Like something that we've all heard before, "communication is key," "safety is key" for us as public works professionals. As stated in APWA's *Blue Book – Public Works Administration* (2008 version), "*Safety is a basic human need, second only to the basic human need for the food, water and air that is needed to live. It should be the primary focus of any public works organization.*" As we all know, there are hundreds if not thousands of potential hazards that our teams can face on a day-to-day basis while serving our communities. To manage your workplace safely be sure to create, implement, use, and update your safety policies and procedures.

These written tools will help set the expected and accepted standard for safety in an organization.

In my local government experience, a safety policy is adopted by the Employer (in consultation with the Union) while the procedure is often developed by the unionized team members (in consultation with the Employer) that are doing the work as they are the experts in their field that know of the hazards and how to mitigate them. Having a strong set of safety-related policies and procedures is another great tool in managing your workplace and doing so safely.

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You'll want to hire the right person, then onboard them to your organization's expected work philosophies and goals, and then retain them so that they remain on your team for years to come.

## **Staffing – Hiring, Onboarding, and Retaining**

When hiring new team members, I often remember the words I heard from a now-retired HR Director where she often liked to say that “we are looking for the right fit, at the right time, for the right position.” She also used to say that openings with our organization are “like little golden nuggets, we need to be very careful with whom we give them away to.” These two statements have stuck with me through the years as small reminders of the importance of staffing the critical openings and roles on our teams. First, you'll want to hire the right person, then onboard them to your organization's expected work philosophies and goals, and then retain them so that they remain on your team for years to come. Here's some more suggested tools for your consideration:

**1. Hiring:** If you have the time, please head to the APWA's website and refer back to my June 2020 *Reporter* article “Recruiting for Culture” that was prepared for the LMC's “People, The Engine of Public Works” series. In this past article I wrote about the importance of the recruitment/hiring phase and provided a few tips and suggestions as to how to handle this critically important aspect of staffing your team. You have such a small window of time during the hiring process to really figure out if this person in front of you is the right fit for your organization. Yes, they may meet all of the technical abilities of the vacancy, but are they the right person for your team? Should you choose the greener applicant who has an amazing attitude but comes with less experience than what you had hoped? When it comes to staffing, really do your best to try to ensure that you are hiring the right person to begin with.

**2. Onboarding:** When the hiring is done, you then move on to the onboarding part of staffing your team. First, please keep in mind that your new hires will have lots of great energy and ideas when they are getting started with your organization. This energy is awesome and can be contagious, so be careful not to stifle that enthusiasm as the new hire will likely contribute positively to your team. But that said, the onboarding phase of staffing your team is important and there will be a number of items that your new team member will need to learn and understand about your organization. Important items such as understanding safety policies and procedures, learning operational procedures, and team building exercises are just a few quick examples of what might happen during your onboarding phase of staffing.

This is the time to mold your new employee into part of your existing team, while being open to the fresh ideas that the new hire might bring to the team. If you've done your hiring correctly, onboarding should flow smoothly, and you will be well on your way to a successful relationship. If you have not hired well (and we know this happens), and when you are in that unionized environment, do not let the probationary period pass you by. Also, if you feel like the probationary period should be extended, it's probably never going to work out with this hire, and it is likely time to part ways.

Sometimes, retaining your team can be the easiest parts of staffing, or one of the most difficult.

**3. Retaining:** Sometimes, retaining your team can be the easiest parts of staffing, or one of the most difficult. Whether it be a good or bad situation at work or at home, finances, life change, you name it, you just never know what someone might be going through. All of these factors and more will play into the retaining phase of your staffing. If you've got a great work culture, a highly productive and engaged team, odds are that retaining that team should be relatively easy. People want to be a part of something like this. It is likely that in this type of scenario, you allow for and support empowerment.

Empowerment is such an amazing tool that leads to trust and personal growth. Do not be shy to empower your people. Another great tool for retaining your team is to recognize their hard work and success, provide incentives such as personal growth and development opportunities, consider total compensation options, offer a good work/life balance, and don't forget about food—you can never go wrong with food! Just be aware, your retention efforts could all be for naught pending the individual or the next jurisdiction over; sometimes change is inevitable.

Good luck with staffing your team! It's a challenging but rewarding process that is ongoing.



November 2022 » Columns » Bringing management skills together to create a Ready & Resilient organization

# Bringing management skills together to create a Ready & Resilient organization

Nancy Cole, RA, Director of the Capital Program Office, Pima County, Arizona; President-Elect, APWA Arizona Chapter; APWA Leadership & Management Committee Knowledge Team Member





Arizona APWA members attending PWX 2022 in Charlotte

This year's PWX 2022 theme "Ready & Resilient" showcased the superheroes that lie within each and every public works professional, always READY to serve their communities, and RESILIENT as ever in their abilities to pick themselves up off the ground after encountering challenges. This article ties together the Leadership and Management Committee's series on Mastering Management by adopting five management functions to ensure successful work: Planning, Organizing, Scheduling/ Delegating, Controlling/Improving and Staffing. Managers are heroes in our public works organizations. Managers are running the essential business functions necessary to meet our leadership's goals and objectives. These everyday tasks, when in place and operating smoothly, are almost invisible but are the underlying foundation that results in a ready and resilient workforce.



Leadership and Management are often used interchangeably but they are distinctly different. Leaders provide the vision, motivation and inspiration within an organization. Managers focus on bringing order from chaos, creating predictable and repeatable results in order to keep an organization working efficiently (Kotter, 1990). These are both critical to an organization and they operate best in tandem. Leaders may be easier to spot in an organization, but a great manager is the backbone of a well-run system ensuring everything works together as planned. How can managers master these processes in today's rapidly changing world to oversee that ready and resilient workforce? Consider using those five management functions to create a resiliency plan.





Mastering Management poster detail demonstrating the five management functions

**Planning** – A work plan is a pre-defined set of goals and expectations used to proactively guide the organization's workload by ensuring that appropriate resources are available. This provides the plan and justification for resources so that the people, equipment and funds are ready to do the job and leadership is in agreement with the allocation and application of those resources.



## JR VIEWPOINT

For more information about international public works exchange, check out the APWA Jennings Randolph International Fellowship:  
[www.apwa.net/JRFellowship](http://www.apwa.net/JRFellowship)

For more international ideas and to hear from past fellowship recipients, check out the APWA International Affairs Committee's JR Viewpoint blog!  
<http://www3.apwa.net/jrfellows/blog/Posts>

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Which arenas in public works have been the most challenging in recent years? At PWX 2022 it was clear that dealing with events due to extreme climate change, the continuing impacts of COVID and the need to focus on retention and recruitment of staff at all levels are pervasive. Most agencies have been working to change their perspective in recruitment, realizing we cannot compete with the private sector on salary alone. Creating a resiliency plan could address how to better deal with these unknowns.

**Organizing** – The organizing focus area has several critical functions: creating an organizational structure/chain of command, organizing the resources needed for work (people, equipment, funds, materials, etc.,) and the technology and business processes necessary to complete the work. One major focus area in March discussed the importance of the organizational chart and how diving into this tool has the potential to maximize your team's potential and efficiency.

Several PWX educational sessions discussed how government organizations see the need to reconsider their traditional hierarchical organizational structure, and look for opportunities to take advantage of changing conditions and younger staff who operate differently. In particular, Seth Mattison discussed the Future of Work and Networks vs. Hierarchies. A network consists of connections made across the organization, sharing information and workload differently than in the past. Younger generations are uncomfortable operating within a vertical structure. They access information differently and want to go directly to the sources of information regardless of location.

Are you ready for this change in perspective? How can managers take advantage of staff across departments within an organization to implement these networks? This type of cross connection may become more critical in the future as we face more unknowns. Look at your organization. Who takes over if management is out one hour, or one day, or one week, or forever? Can you identify, train and find someone in your organization who will step up?

**Scheduling/Delegating** – The May article focused on scheduling as the art of getting work done. Creating a schedule is taking a plan, breaking it down into manageable tasks, and applying a time and resource component. A master manager can use a detailed schedule to plan through necessary tasks and make sure the resources—people, equipment, or funds—are in place at the right time for the right purpose. Delegating is a part of this resource planning. Delegate tasks within the overall plan to responsible staff. They have a work plan, timeline and defined resources, and a great manager allowing staff to own that task and deliver it for the team.

A resiliency plan could benefit from schedule management in several ways. Consider how to arrange staff to meet a 24/7 emergency need, or how to arrange different resources to work together for a specific need. An excellent example of creating multi-discipline operations teams can be seen when instead of sending out separate teams for asphalt management or pipe repairs they used mixed teams where the subject matter expert would lead based on the type of work. This allows the city to better manage work with smaller and more flexible teams. This type of innovative scheduling and delegation of resources can help any manager create teams ready for anything that comes their way.

**Controlling/Improving** – A master manager needs to look at the overall picture, ensure the plan is followed, and determine if key performance indicators are on track. Managers can make adjustments, problem-solve where necessary, and review processes in place to determine if they are relevant and functional. Learning how to make good decisions requires a thoughtful process that weighs all sides of the issue, and involves multiple perspectives. Understanding whether expectations are being met or not provides an opportunity for course correction and/or the ability to improve the outcomes. Clear goal setting and performance measures are important tools within this functional area and must be clearly communicated to be successful.

Several PWX sessions focused on creating diverse teams and demonstrated how these teams could work together to resolve issues in innovative ways. In particular, one lightning round focused on creating a technology implementation plan for a smart cities initiative. The innovative aspect was assigning an urban planner as lead, working with information technology staff and key stakeholders. These different perspectives transform the discussion from how to implement technology to focus more on leveraging technology for better community results. Viewing the information with a more diverse lens and creating goals that measure the impact are critical aspects to understanding if your city is actually “smarter.” The technology is not the problem; it’s how to make smart decisions. A “smart” meter isn’t really smart, it just uses technology to make the process of reading meters smarter. Leveraging a meter network for additional purposes can bring that decision to the next level. How can you incorporate multiple perspectives, data-driven goal management and good decision making to improve your ability to respond to change?

**Staffing** – It doesn’t matter how good a manager you are if your team isn’t ready to do the job. Recruiting, managing and retaining staff are critical elements to building a public works team. This topic was definitely an overwhelming theme at PWX 2022. Every agency has been working to improve their recruitment and retention to build a better team.



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A resiliency plan needs to consider staff management as the most important resource you have available within your organization. The best people go where they are valued, and compensation is important but career development and meaningful work are also critical to retaining staff. To build resiliency into our workforce we need to build a multi-dimensional plan on how to create a workforce culture that demonstrates our commitment to their future. Build

performance plans that include career development plans. Invest in your team and they will return that investment over time. Identify critical areas within your organization and continuously recruit and train to maintain critical positions fully staffed.

Mastering management skills is necessary for a highly functioning public works organization. Great managers are some of the unsung heroes in public works, creating that ready and resilient workforce. Thank you to all of the session speakers for creating such a great opportunity to learn and grow at PWX 2022.

*Nancy Cole can be reached at [nancy.cole@pima.gov](mailto:nancy.cole@pima.gov) (<mailto:nancy.cole@pima.gov>).*

#### References

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Please see more information regarding these topics from PWX 2022 sessions including:

- Seth Mattison: Navigating What's Next: Leadership Insights for the New World of Work
- Lightning Round: Resiliency 101, What is a Smart Community? Harnessing Data and Technology to Build Equitable and Resilient Cities
- What Can We Do Today to Improve Recruitment and Retention in Public Works?
- General Session – An Industry Discussion: Exploring Public Works Workforce Innovations
- Leading Department-Wide Continuous Improvement Initiatives Using a Goal Team Framework
- Creating a Collaborative Space between Public Works Departments
- Mastering Management



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