



# CITY COUNCIL WORKSHOP - ORGANIZATIONAL ASSESSMENT PRESENTATION

**Tuesday, January 16, 2024 at 5:00 PM**

City Hall 8319 Co. Rd. 11 Breezy Point, MN 56472

(218) 562-4441 | Office Hours 8:00 a.m. - 4:00 p.m. | [cityadmin@cityofbreezypointmn.us](mailto:cityadmin@cityofbreezypointmn.us)

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## AGENDA

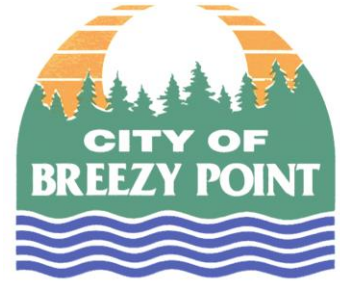
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### 1. ORGANIZATIONAL ASSESSMENT FINAL REPORT

[A.](#) Organizational Assessment Presentation

TO: Mayor and City Council  
FROM: David Chanski, City Administrator/Clerk  
RE: Organizational Assessment Final Report  
DATE: January 16, 2024

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In August 2023, the City Council called for an organizational assessment to be conducted on the City. A Request for Proposals (RFP) was issued shortly thereafter for an independent, 3rd-party consultant to conduct the assessment. The City received 7 responses to the RFP, and the City Council selected the proposal from Resource Management Associates (RMA) on October 2nd.

The objectives of the organizational assessment were:

- Analysis of current staffing levels
- Analysis of current service provisions
- Analysis of future projects' impact on staffing levels and service provisions
- Recommendations for immediate and future staffing needs
- Recommendations for reorganization
- Recommendations for service delivery improvements

During the week of October 16, 2023, Mr. Sheldon Cohen with RMA spent over 40 hours on-site, touring facilities and interviewing every member of the City Staff, the City Council, and various consultants and community partners. Additionally, Mr. Cohen's review included the City Code, various City policies, staff job descriptions, wages, and benefits, professional service contracts, current and previous budgets and financial reports, and demographic information.

On December 13, 2023, Mr. Cohen issued his Final Report to the City and will present the findings of his assessment in-person during the City Council workshop on Tuesday, January 16, 2024, at 5:00pm. This presentation will be recorded, and the public is invited to attend.

City of Breezy Point,  
Minnesota

# Organizational Assessment



**Resource  
Management  
Associates**

**\*\*\* FINAL PRESENTATION \*\*\***

January 16, 2024

**Sheldon Cohen, Project Manager and Principal Consultant**

# Today's Agenda

Section 1, ItemA.

- Project Goal
- Approach and Workplan
- Key Findings & Recommendations
- Next Steps
- Q&A and Discussion



# 1: Project Goal

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# Project Goal Per the Request For Proposals (RFP)

**“...to conduct an assessment on the organization to identify the City’s immediate and future human capital needs. Such an assessment should include but not be limited to:**

- Analysis of current staffing levels**
- Analysis of current service provisions**
- Analysis of future projects’ impact on staffing levels and service provisions**
- Recommendations for immediate and future staffing needs**
- Recommendations for reorganization**
- Recommendations for service delivery improvements”**

**➔ Stay focused on the project’s goal.**

# 2: Approach and Workplan

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# Project Approach

- **Project Organization Conference: October 5, 2023**
- **Organization of Review Panel**
- **Review of Background Information: City, State and Other Sources**
- **Industry Standards & Best Practice**
- **29 Interviews and Contacts: All City Council, All Staff, Vendors: Oct. 16-20, 2023**
- **Observe Operations**
- **Population Growth, Geography, Topography, Demography.**
- **Data Analysis: Financials, Police, Public Works**
- **Facilities: City Hall, Police, Public Works**
- **Staffing/Human Resources (“HR”)**
- **Information Technology (“IT”)**
- **Interlocal Partnerships**
- **Project Status Conference: November 15, 2023**
- **Draft Organizational Assessment**
- **Staff Review Panel’s Draft Review: November 29, 2023**
- **Review and Revise Draft Organizational Assessment**
- **Finalize & Ship Organizational Assessment: Dec. 13, 2023**
- **Present Organizational Assessment: Jan. 16, 2024**





# Independence and Objectivity

Section 1, Item A.

## Organizational Assessment Is Driven By:

- Detail
  - Thoroughness
- Input of City Council, Staff and Contractors
  - Data
    - Facts and Information
  - State and National Standards
  - Knowledge and Experience

# Building the Organizational Assessment

Section 1, Item A.

Policy/Budget=====→

Services=====→

Staffing=====→

Organization.

# Key Concepts: Assessment

Assessment involves the words efficiency and effectiveness.

- Efficiency is defined as the City's application of resources--human, financial, physical or informational--to achieve a specified goal or objective.
- Effectiveness refers to the quality of Breezy Point's delivery of services.

# Key Concepts: Priority

Priority considers the words risk and impact.

Risk addresses possible adverse consequences to the City from a current or foreseeable situation, or the City's not taking a given action.

Impact looks at the breadth or depth of the consequences of an action on Breezy Point's residents, visitors, businesses, City government, or other parties. This has been stated over the years as the Utilitarian Principle, i.e., the greatest good to the greatest number of people.

# 3: Key Findings and Recommendations

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# Section Three: The Context of the Organizational Assessment

## Key Characteristics of Breezy Point:

1. Small, rural city of 2,813 with population density of 240 persons per square mile.
2. Relatively high rate of population growth: 3%/year.
3. Vacation/destination city: 3X Summer population.
4. No distinctive natural or human-made features or risks.
5. Full-service municipality.
6. Intergovernmental relationships.
7. Option B statutory council-manager city.

# Section Four: Policy and Administration

Section 1, ItemA.

1. Staff provides solid support to the City Council.
2. Should hold staff meetings every Tuesday morning before and after each Council meeting.
3. City Administrator retain all direct reports.
4. More meat in City Council minutes.
5. City Web site provides lots of information and transparency, e.g., 100-200 page Council packets.
6. Roles of City Administrator, Assistant City Administrator and Deputy Clerk/Office Manager will be evolving with new Planning & Zoning Administrator and ERP system.
7. City Administrator: more engagement with business community.
8. City-wide annual report: now just Police.
9. Continue to use resources of LMC, etc.

# Section Five: Financial Management

Section 1, ItemA.

1. **Urgent need to procure and implement a new ERP system: major productivity gains.**
2. **Build secure, decentralized access for end-users to new ERP processes, e.g., financials, payroll/ HR → departmental productivity gains.**
3. **Revise chart of accounts: work with auditor.**
4. **Implement purchase-order-based encumbrance accounting.**
5. **Develop comprehensive, City-wide Capital Improvement Program (“CIP”).**
6. **Address filing and organization of financial records.**



# Section Six: Public Works

1. Changes in the work of Public Works are mainly growth-driven.
2. The staff in Public Works operates at a very high level of efficiency and effectiveness.
3. A new Public Works garage is needed urgently.
4. The City Council needs to establish a policy for funding of road work at a specified % of the General Fund budget.
5. A fourth Public Works Worker may very well be needed in the next 5 years.
6. The Public Works Supervisor should recapture significant productive time from the implementation of the new ERP and other recommendations made here about IT.
7. Public Works should be open to considering specialized software for functions like route optimization for snow plowing or pavement management.
8. Public Works' cost of overtime is very low.

# Section Seven: Police

1. Addressing the need for additional non-sworn or sworn personnel in the face of the tripling of Breezy Point's population in Summer is the most urgent and significant task in front of the City and the Police Department.
2. A secure outside entry for persons fleeing violence or the threat of violence should be constructed.
3. The Police building otherwise should serve the Department for approximately 10 more years.
4. Breezy Point should anticipate the need for an additional Police Officer as the City continues to grow.
5. The City has done an outstanding job of providing the Department with appropriate law-enforcement technologies, supporting the Officers' safety and performance.
6. The Police Department's cost of overtime is very low.

# Section Eight: Fire Service

1. The organization of the Pequot Lakes Fire District in 2022 has led to enhanced fire service for Breezy Point mainly through (1) the City's role in governance and (2) the adoption of a sound Capital Improvement Program ("CIP").
2. The Fire District should undertake a full evaluation of the remaining useful lifetime of Engine 1, the 2003 Peterbilt, stationed in Breezy Point.
3. The Fire District should be recruiting call firefighters actively, especially where it now has filled only 23 of 30 budgeted positions.
4. The addition of the new ladder truck should enhance the Fire District's capabilities and its responsiveness to Breezy Point significantly.
5. The Fire Chief should have secure, decentralized access to the City's new ERP system.
6. The Fire District should monitor the demands on the Fire Chief's time as these may change over time.

# Section Nine: Planning & Zoning

1. **Planning & Zoning is in a major transition, with the first appointee to the position of Planning & Zoning Administrator just having begun work with the new fiscal year starting January 1, 2024.**
2. **The nature of work related to Planning & Zoning which other City offices do may likely change as the Planning & Zoning Administrator's position gets established and evolves.**
3. **The Planning & Zoning Administrator should provide a monthly, written report of their activity for the first year/2024.**
4. **The Planning & Zoning Administrator and Assistant City Administrator should work as a team in exploring property-related information which the State or County may have available.**
5. **Breezy Point should explore how computer-based systems may be able to support the work of Planning & Zoning.**

# Section Ten: Human Resources

Section 1, ItemA.

1. Breezy Point has acted positively and proactively in the last two years in addressing compensation of City employees.
2. Implementing weekly staff meetings, tied to meetings of the City Council, should aid significantly in building teamwork and motivation among the City's staff.
3. The planned revision of Breezy Point's Personnel Policy in 2024 should bring this important element of City government current with best practice and legal requirements.
4. Breezy Point should be funding the participation of the City's staff in Minnesota State-level, regional and national professional associations.

# Section Eleven: IT and Systems

1. The main recommendation related to IT which this Organizational Assessment makes is that the City replace the current application-software system from Banyon Data Systems which the City first licensed in 2006.
2. Breezy Point should undertake a careful process to carry out this effort, beginning with establishing a user-committee and carrying out a detailed needs assessment, and concluding with the execution of a performance-based contract with the successful vendor and structured implementation. This also includes engaging the services of an independent consultant with significant experience in the procurement and implementation of municipal ERP systems to assist in this major decision.
3. The Assistant City Administrator should serve as Breezy Point's lead on issues related to IT.
4. The Review Panel organized as part of this project should continue to act as the City's IT user-group.

# Section Twelve: Summary of Staffing

1. Solving the need for additional staffing in the Police Department in Summer must be Breezy Point's top priority for staffing.
2. While the addition of full-time personnel, such as another Police Officer or Public Works Worker, may be justified as a result of population growth, development or other factors in the next few years, Breezy Point should evaluate each of these individually as facts may recommend.
3. Adding part-time employees may be appropriate in certain cases.
4. Contracting should be reviewed as an appropriate strategy in specific cases.
5. Interlocal cooperation may be an option worth considering for staffing and delivery of specific services. Having a common civic culture is the threshold issue here.

# Section Thirteen: Summary of Services

Section 1, ItemA.

1. The nature of future growth in Breezy Point's population and development surrounds discussion of the City's services.
2. Breezy Point overall delivers a high quality of services.
3. The main area where the quality of service has not met this high standard is in responsiveness to contacts involving Planning & Zoning. This situation should be remedied with the new Planning & Zoning Administrator's having begun work on January 1, 2024.
4. The new CRM application system which this Organizational Assessment recommends for review should help to provide better information to the City about the quality of its services.



# Section Fourteen: Summary of Organization

Section 1, Item A.

1. This Organizational Assessment sees no need for any reorganization of Breezy Point's City government.
2. Breezy Point may wish to review its organization in approximately five years when the nature and impact of the next period of growth is more clear.

# Section Fifteen: Summary of Facilities

Section 1, ItemA.

1. The Breezy Point City Hall is disorganized and dysfunctional, adversely affecting the functioning of City government, the delivery of municipal services, and the efficiency and effectiveness of the work of the staff.
2. The Public Works garage is now beyond its functional limit and should be replaced as a Phase I priority.
3. The Police Department's building is meeting its needs and the Chief of Police expects that it has another 10 years of useful lifetime.
4. While the sewer plant is not expected to require major expansion or replacement for approximately 10 years, other improvements in the sewer system may need to be made.
5. The pace and nature of growth in Breezy Point will likely affect the nature of facilities which the City may need and at what point in time.

# Section Sixteen: Financial Considerations

Section 1, ItemA.

1. This Organizational Assessment recommends two, major investments to enhance Breezy Point's services and staffing: (1) procurement and implementation of a new ERP system; and (2) replacement of the Public Works garage.
2. Responsible cost estimates for each of these two, major investments cannot be made at this time since the specific scope of each of these projects cannot be known.
3. Several smaller investments are recommended, from additional Summer staffing and the entry shelter for the Police Department to small equipment for Public Works.
4. The City Administrator should be responsible for integrating the one-time and annual-operating costs of these investments into the City's CIP and operating and capital budgets in order to assure that they are fiscally prudent and sustainable.
5. City Council should adopt a %-based policy for annual funding of road work.

# 4. Next Steps

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# Section Seventeen: Implementation

1. This Organizational Assessment offers 36 Priority I recommendations--19 cost and 17 non-cost.
2. City Council needs to proceed very deliberately in evaluating the recommendations, looking to the input of the staff.
3. The City Administrator acts as project manager.
4. Staff members as leads for specific recommendations.
5. Fit the recommendations within the City's operating and capital budgets and fiscal strategy, considering statutory or other fiscal constraints.
6. Identify "low hanging fruit."
7. City Administrator provides monthly report on implementation to City Council.
8. Capacity is a key issue: (1) large number of recommendations; (2) small size of the City's staff.

# Top Priorities: Driven by Risk and Impact

1. **Resolve City Hall decision.**
2. **Procure and implement new ERP.=→**
3. **Revise chart of accounts.=→**
4. **Implement purchase-order-based encumbrance accounting.**
5. **Police Summer staffing.**
6. **New Public Works garage.**
7. **Police station safe entryway.**
8. **% \$ commitment for roadway funding.**
9. **Implement Capital Improvement Program (“CIP”).**
10. **Revise Personnel Policy.**
11. **Robust City Council minutes.**

# 5: Q&A and Discussion

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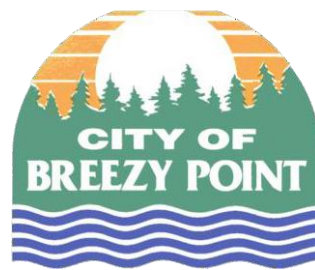
# Thank You!

**R**esource  
**M**anagement  
**A**ssociates





# City of Breezy Point, Minnesota



## Organizational Assessment

December 31, 2023





December 31, 2023

David Chanski  
City Administrator/Clerk  
City of Breezy Point  
8319 County Road 11  
Breezy Point, MN 56472

Dear Mr. Chanski:

Resource Management Associates (“RMA”) is pleased to present this *Organizational Assessment* to the City of Breezy Point (the “City”).

We wish to thank the City Council, the many employees of the City and others who have contributed significantly to developing the *Organizational Assessment*. The diligent effort of all of these parties has enriched this work product.

Thank you for the opportunity to have been of service to the City of Breezy Point.

Sincerely,

*Charles D. Hale*  
Charles D. Hale  
President



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## Executive Summary

The Breezy Point City Council decided to discuss the idea of conducting a staffing and services study, subsequently described as the *Organizational Assessment*, at its workshop meeting on August 15, 2023, as a corollary to its discussion of the new position of Planning & Zoning Administrator.

The City Council’s interest in the *Organizational Assessment* was a response in large part to the extraordinary growth in development and population which had begun in the decade between 2000 and 2010. Data from the U.S. Bureau of the Census showed growth in the decade from 2000 to 2010 of 139.6 per cent, and from 2010 to 2020 of 9.7% percent as Table 1 presents.

**Table 1**  
**Change in Population**

Year	Population	% Change
1990	432	----
2000	979	126.6%
2010	2,346	139.6%
2020	2,574	9.7%
2023 <sup>1</sup>	2,813	9.29%

<sup>1</sup><https://worldpopulationreview.com/us-cities/breezy-point-mn-population>

As the last two rows in Table 1 show, this relatively high rate of growth continues to the present day. Just in the last three years from 2020 to 2023, Breezy Point has seen growth in population of 9.29 percent, almost equaling the total growth for the preceding decade of 9.7 per cent. To put this in perspective, many municipalities of various complexions across the United States see growth of approximately 10 per cent in a decade, not just three years. One can only speculate about the growth in Breezy Point’s population which may continue through the current decade to 2030. Extrapolating the growth in population of 9.29 per cent over three years or an average of 3.10 per year to the full decade to 2030 produces an estimated growth of 31.0 per cent or a 2030 population of 3,372, an increase of 798.

The suggestion has also been made that a relatively significant number of residents of Breezy Point are not legally domiciled here, instead holding legal residence in Florida or other places. This, then, would result in an undercount of Breezy Point’s population. Moreover, as a vacation and resort community, Breezy Point estimates that its total population including non-permanent residents peaks around 10,000 on weekends in Summer and 14,000 on the Fourth of July weekend, also increasing demand for the City’s services.

The City Council and City Administrator recognized that Breezy Point needed to be thinking about the impact of this growth on the City, especially as this might affect decisions about services, staffing and the City’s organization. Indeed, this concern had led the City Council in the last two years to add a seventh police officer, an Assistant City Administrator, and Planning & Zoning Administrator.

The City Council looked at these facts and decided to undertake this *Organizational Assessment* in order to have an independent, fully objective, comprehensive view of these issues. As Breezy Point stated at Page 3 of its Request for Proposals for Organizational Assessment (the “RFP”), issued August 26, 2023, the purpose of the *Organizational Assessment* was:

...to conduct an assessment on the organization to identify the City’s immediate and future human capital needs. Such an assessment should include but not be limited to:

- Analysis of current staffing levels
- Analysis of current service provisions
- Analysis of future projects’ impact on staffing levels and service provisions
- Recommendations for immediate and future staffing needs
- Recommendations for reorganization
- Recommendations for service delivery improvements

Breezy Point received five proposals for the *Organizational Assessment* by the due date of September 15, 2023 and the City Council voted at its monthly meeting on October 2, 2023 to follow the staff’s recommendation and award this contract to Resource Management Associates, Inc. of Tinley Park, Illinois (“RMA”). RMA was selected as a result of an open, competitive national procurement.

While staffing, delivery of services and reorganization were the core issues of the *Organizational Assessment* as the RFP had stated, other aspects of the City were addressed to the extent that they had a direct impact on the core issues. This was limited to a small number of elements:

- Human resources (“HR”), managed by the City.
- Information technology (“IT”) in its many forms, focusing primarily on the various systems, applications and vendors serving Breezy Point.
- Funding, including operating and capital budgets.
- Facilities, addressing the working environment of the staff at City Hall and other work sites.
- Geographic characteristics of the City.
- The nature of physical development in the City.
- Demographic characteristics of the City.

It is important to make certain observations about the organization and scope of this *Organizational Assessment*.

- It understands the fundamental importance of *scale* as the driving factor in addressing the issues in the *Organizational Assessment*. Breezy Point is not just a small city: it is a very small city with a population of less than 3,000 in 11.72 square miles with total authorized staffing of 18 full-time and two part-time personnel.
- It recognizes the City as part of an intergovernmental system, for example sharing fire services with Pequot Lake and being affected today or potentially by decisions of Crow Wing County, the State of Minnesota or the U.S. Government.

- It recognizes the City as providing a wide range of services from law enforcement and the fire service to public information, financial management, growth and human resources.
- It appreciates the professionalism of the City’s staff and the dedication of its elected and appointed leaders and volunteers.
- It knows that the current configuration of services at the City impacts fundamentally how this *Organizational Assessment* addresses its charge from the City Council.
- It applies wherever possible the widely recognized principle of *best practice*. This looks at how various aspects of the City, from selection of its personnel and implementation of standard operating procedures to its deployment of information technology, compares with national standards and the state of the art among comparable municipalities in the United States. This insight draws on the consultant’s decades of experience in hundreds of engagements with local governments in the Midwest and across the United States.
- It applies the concept of *strategic positioning*. This means that the City, through the City Council, should be taking actions now which establish the foundation for efficiency and effectiveness in staffing and the delivery of services which is needed for the City to function both in the short and longer terms as a high-performance organization. Strategic positioning for the City also considers changes which may occur in its environment such as the impact of growth in Breezy Point and its environs, changes in technology, or other statutory, regulatory or judicial factors. Strategic positioning is often characterized as “buying smart, not cheap.”

This *Organizational Assessment* followed a careful, systematic approach in addressing the full scope of work of this engagement. Key tasks here included:

- Conducting a Project Organizational Conference on Thursday, October 5, 2023, with the City Administrator and Assistant City Administrator. This meeting lasted about one hour and a half and was held to establish a common understanding of the specifics of the project plan and assure that all parties had clear agreement on the conduct of the project.
- Reviewing various documents. The *external resources* here included among others: (1) the Minnesota City and Town Accounting and Financial Reporting Standards issued by the State of Minnesota Office of the State Auditor; and (2) Chapter 3, The Statutory City, from the League of Minnesota Cities’ Handbook for Minnesota Cities. *Internal resources* ranged from: (1) the last several years of budgets, audits and management letters; (2) materials prepared by and for City departments such as the Police Department’s 2022 Annual Report and Public Works’ Road Rating Report from 2020; (3) agendas, packets and minutes of the City Council; (4) position descriptions for all titles in the City; and (5) contracts and annual-support agreements with vendors of IT and communications systems.

- Interviewing a total of 29 individuals on a confidential basis. This included the Mayor and all members of the City Council, every full-time employee of the City, and several contractors. These interviews were critical to providing the particular perspective of these individuals and formed a significant part of the informational foundation for this **Organizational Assessment**. Many subsequent communications took place to address various aspects of this **Organizational Assessment** in greater detail.
- Observing the City’s operations, mainly in connection with interviews of staff. This was important in providing a view of what actually transpires in the work the City performs in its delivery of services, including the quality of the staff’s work, the level of teamwork and issues in related areas such as information systems and communications.
- Addressing best practice. This looked to national standards and how leading, comparable municipalities address issues related to the scope of the **Organizational Assessment**.
- Conducting a midpoint update with the City’s staff on November 15, 2023 to provide a view of how the **Organizational Assessment** was evolving. The consultant presented a preliminary view of major findings and recommendations, and solicited feedback from the staff.
- Having the City’s review panel review the draft of the **Organizational Assessment**, focusing on the findings and recommendations and soliciting the staff’s input and comment for incorporation into the final product by December 1, 2023. The draft of the **Organizational Assessment** had been provided 11 days earlier on November 20, 2023 in order to give the staff ample time to review the draft.
- Revising the **Organizational Assessment** as a result of the staff’s review and preparing it in final form.

This process resulted in full and frank discussion. All aspects of this **Organizational Assessment** have been reviewed and discussed thoroughly with the participants. As well, each of these tasks contributed significantly to the development of the **Organizational Assessment**.

Most important, all of the participants in the **Organizational Assessment** have shown exceptional interest in this effort. Their seriousness and dedication will be as critical as any other factors in having the City be as successful as possible in making decisions about the scope of the **Organizational Assessment**.

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## KEY FINDINGS AND RECOMMENDATIONS OF THE ORGANIZATIONAL ASSESSMENT.

The paragraphs which follow in this Executive Summary present key findings and recommendations of this *Organizational Assessment*.

1. Breezy Point’s relatively high rate of growth envelops the consideration of almost every aspect of this *Organizational Assessment*.
2. Breezy Point delivers almost all of its services at a high level of quality. The only exception to this has been customer service related to Planning & Zoning, mainly because of the part-time staffing of this function. The advent of the new, full-time Planning and Zoning Administrator as of January 1, 2024 should cure this situation.
3. This *Organizational Assessment* recommends no new full-time positions.
4. The only change in staffing which this *Organizational Assessment* recommends is the urgent need, prior to Summer of 2024, to provide more appropriate Police presence during weekends in Summer when Breezy Point’s population balloons, more than tripling from less than 3,000 to approximately 10,000 on weekends and a peak of roughly 14,000 over the Fourth of July weekend.
5. This *Organizational Assessment* recommends no change in the organization of Breezy Point’s City government.
6. All members of the City Council express substantial satisfaction with the quality of support received from the City’s staff.
7. The City Council needs to resolve the future of the City Hall.
8. Breezy Point needs urgently to procure and implement a new Enterprise Resource Planning (“ERP”) computer system, addressing the City’s core financial and other functional requirements. The new ERP should have major benefit to departments throughout the City.
9. The City should revise its chart of accounts and implement purchase-order-based encumbrance accounting as part of the implementation of the new ERP system.
10. The Public Works garage has reached its operational limit and needs to be replaced as a Priority I project.
11. The City will need to develop a fiscal strategy in connection with the implementation of this *Organizational Assessment*’s recommendations, taking into consideration (1) the City’s budgetary calendar and (2) Minnesota state law.
12. The City Council should adopt a policy to fund annual road work as a percentage of the General Fund’s operating budget.



13. The City Administrator should proceed with the development of a comprehensive, City-wide Capital Improvement Program (“CIP”) during 2024.
14. Breezy Point should construct a safe entryway at the Police Department for persons fleeing violence or the threat of violence. This recognizes that there is no staff in the reception area 15 hours a day from 4:30 P.M. to 7:30 A.M.
15. The City Council should keep more robust minutes of its meetings, including for example discussion involving different points of view or split votes.
16. Breezy Point ought to be holding staff meetings (1) every Tuesday morning before Council meetings in order to have the agenda and packet ready for distribution on Wednesday and (2) immediately after each Council meeting in order to manage follow-up to each meeting.
17. The City Administrator should report on the status of implementation of the recommendations of this *Organizational Assessment* monthly to the City Council.
18. The Planning and Zoning Administrator should report on their activities to the City Council monthly for the first year of their tenure.
19. The City should revise its Personnel Policy.
20. The City Administrator should retain all direct reports.
21. The Pequot Lakes Fire District ought to review the useful lifetime of the 2003 Peterbilt fire engine which is stationed in Breezy Point. This critical apparatus is presenting ongoing issues of maintenance, taking it out of service for approximately two weeks at a time and, thus, impeding fire service in Breezy Point.
22. The Fire District is currently short 7 of 30 firefighter positions and should enhance its recruiting efforts.
23. Breezy Point should fund the membership of the staff in professional associations. This is an important way for the City to improve its operations and save money.
24. The Assistant City Administrator should lead the City’s efforts related to information technology (“IT”).
25. The staff-based Review Panel organized for this *Organizational Assessment* should continue to function as Breezy Point’s user-group for IT.
26. The City should continue to use the services of On Systems for technical support in IT.
27. Breezy Point should develop a strategy for procuring and implementing a software application for Customer Relationship Management (“CRM”). This product can help significantly in (1) enhancing communication between residents and the City and (2) providing information regarding the City’s delivery of services and residents’ satisfaction.

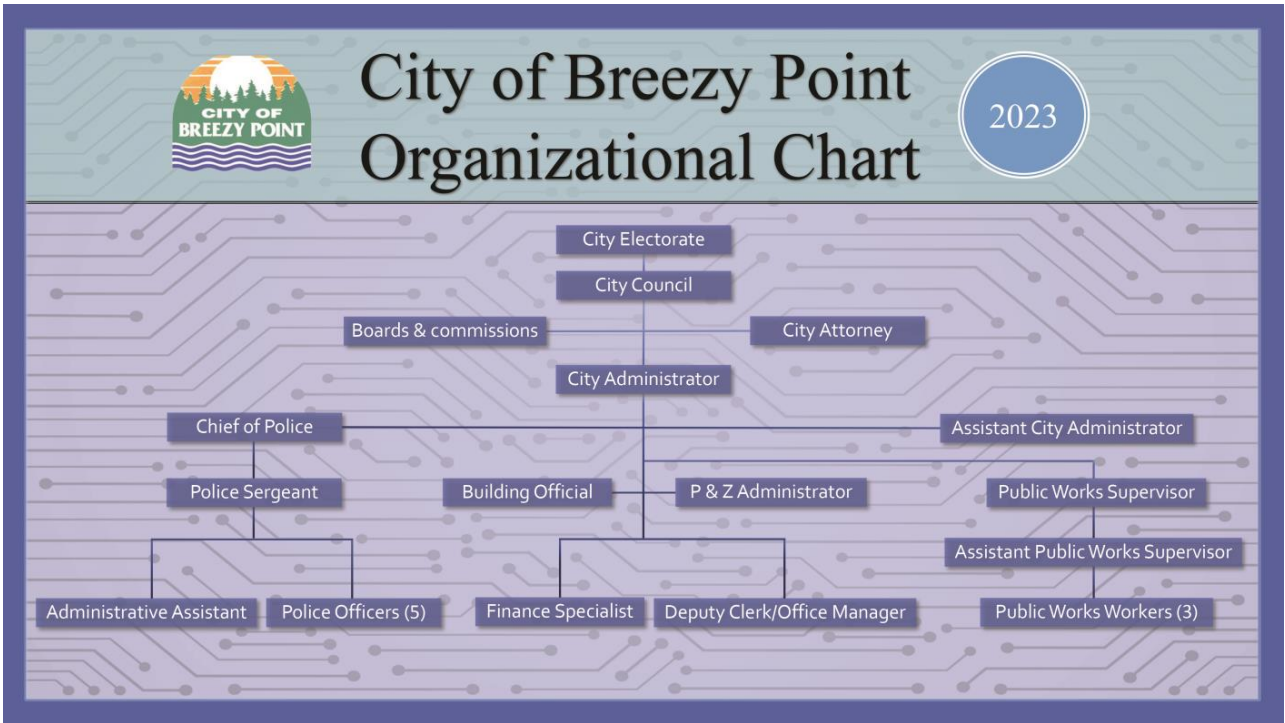
28. The City, mainly through the Review Panel, should identify “low hanging fruit”--those items among the *Organizational Assessment*’s recommendations which can be implemented relatively quickly and inexpensively.

Table 8, Summary of Recommendations by Priority, appears on the next two pages. The City of Breezy Point Organizational Chart then follows.

**Table 8**  
**Summary of Recommendations by Priority**

Line	Section	Recommendation	Cost
1		<b>*** PRIORITY I ***</b>	
2	15.B.1	Resolve City Hall decision.	X
3	11.B.1	Procure and implement new ERP.	X
4	5.B.2	Revise chart of accounts.	X
5	5.B.3	Implement purchase-order-based encumbrance accounting.	
6	7.B.2	Police Summer staffing.	X
7	6.B.3	New Public Works garage.	X
8	7.B.3	Police station safe entryway.	X
9	6.B.4	% \$ commitment for roadway funding.	X
10	5.B.5	Implement Capital Improvement Program (“CIP”).	
11	10.B.3	Revise Personnel Policy.	
12	4.B.10	Robust City Council minutes.	
13	4.B.3	Implement weekly staff meetings around Council meetings.	
14	4.B.6	City Administrator retain all direct reports.	
15	4.B.7	Continue use of League of Minnesota Cities (“LMC”) resources.	
16	4.B.8	City Administrator reach out to business community.	
17	5.B.6	Raise \$\$\$ limits: Council approval of budgeted purchases.	
18	6.B.8	Public Works small equipment.	X
19	7.B.8	Police two monitors.	X
20	8.B.2	Evaluate useful lifetime of 2003 Peterbilt fire engine.	X
21	8.B.3	Active recruitment of additional call firefighters.	X
22	8.B.5	Fire Chief office equipment.	X
23	9.B.5	Planning & Zoning Administrator monthly report to Council.	
24	10.B.4	Staff participation in professional associations.	X
25	11.B.2	Consultant for ERP procurement and implementation.	X
26	11.B.3	Assistant City Administrator as IT lead.	

Line	Section	Recommendation	Cost
27	11.B.4	Review Panel continues as IT user-group.	
28	11.B.5	Continue services of On Systems.	X
29	11.B.7	Evaluate Microsoft 365 Government.	X
30	11.B.9	Provide third-party software to employees and agencies.	X
31	11.B.10	Determine strategy for Citizen Relationship Management (“CRM”).	X
32	11.B.11	All forms on City’s web site in fillable pdf.	
33	11.B.12	Color laser printers for City Administrator and Asst. City Admin.	X
34	14.B.1	No need for any reorganization.	
35	14.B.2	Review organization in 5 years.	X
36	17.B.3	City Council evaluate recommendations with staff.	
37	17.B.4, 8	City Administrator as project manager: monthly report to Council.	
38	17.B.5	Fiscal strategy for implementation: State law, budget calendar.	
39	17.B.6	Identify low hanging fruit.	X
40	17.B.7	Staff members to lead individual implementations.	
41	<b>*** PRIORITY II ***</b>		
42	4.B.9	Publish City annual report.	X
43	5.B.4	Improve filing and organization of financial records.	X
44	6.B.6	Public Works specialized software.	X
45	6.B.10	Sewer system interim improvements.	X
46	9.B.3	Review State and County property information.	X
47	9.B.4	Review IT for Planning & Zoning.	X
48	11.B.6	Evaluate third-party software products.	X
49	11.B.8	Evaluate end-user skills with Microsoft 365.	X
50	12.B.2	Evaluate need for additional Police or Public Works staff.	X
51	12.B.3	Consider adding part-time employees.	X
52	12.B.4	Consider contracting.	X
53	12.B.5	Consider interlocal cooperation.	X



## Section One Project Background

The Breezy Point City Council decided to discuss the idea of conducting a staffing and services study, subsequently described as the *Organizational Assessment*, at its workshop meeting on August 15, 2023, as a corollary to its discussion of the new position of Planning & Zoning Administrator.

The City Council’s interest in the *Organizational Assessment* was a response in large part to the extraordinary growth in development and population which had begun in the decade between 2000 and 2010. Data from the U.S. Bureau of the Census showed growth in the decade from 2000 to 2010 of 139.6 per cent, and from 2010 to 2020 of 9.7% percent as Table 1 presents.

**Table 1  
Change in Population**

Year	Population	% Change
1990	432	----
2000	979	126.6%
2010	2,346	139.6%
2020	2,574	9.7%
2023 <sup>1</sup>	2,813	9.29%

<sup>1</sup><https://worldpopulationreview.com/us-cities/breezy-point-mn-population>

As the last two rows in Table 1 show, this relatively high rate of growth continues to the present day. Just in the last three years from 2020 to 2023, Breezy Point has seen growth in population of 9.29 percent, almost equaling the total growth for the preceding decade of 9.7 per cent. To put this in perspective, many municipalities of various complexions across the United States see growth of approximately 10 per cent in a decade, not just three years. One can only speculate about the growth in Breezy Point’s population which may continue through the current decade to 2030. Extrapolating the growth in population of 9.29 per cent over three years or an average of 3.10 per year to the full decade to 2030 produces an estimated growth of 31.0 per cent or a 2030 population of 3,372, an increase of 798.

The suggestion has also been made that a relatively significant number of residents of Breezy Point are not legally domiciled here, instead holding legal residence in Florida or other places. This, then, would result in an undercount of Breezy Point’s population. Moreover, as a vacation and resort community, Breezy Point estimates that its total population including non-permanent residents peaks around 10,000 on weekends in Summer and 14,000 on the Fourth of July weekend, also increasing demand for the City’s services.

The City Council and City Administrator recognized that Breezy Point needed to be thinking about the impact of this growth on the City, especially as this might affect decisions about services, staffing and the City’s organization. Indeed, this concern had led the City Council in the last two years to add a seventh police officer, an Assistant City Administrator, and Planning & Zoning Administrator.

The City Council looked at these facts and decided to undertake this *Organizational Assessment* in order to have an independent, fully objective, comprehensive view of these issues. As Breezy Point stated at Page 3 of its Request for Proposals for Organizational Assessment (the “RFP”), issued August 26, 2023, the purpose of the *Organizational Assessment* was:

...to conduct an assessment on the organization to identify the City’s immediate and future human capital needs. Such an assessment should include but not be limited to:

- Analysis of current staffing levels
- Analysis of current service provisions
- Analysis of future projects’ impact on staffing levels and service provisions
- Recommendations for immediate and future staffing needs
- Recommendations for reorganization
- Recommendations for service delivery improvements

Breezy Point received five proposals for the *Organizational Assessment* by the due date of September 15, 2023 and the City Council voted at its monthly meeting on October 2, 2023 to follow the staff’s recommendation and award this contract to Resource Management Associates, Inc. of Tinley Park, Illinois (“RMA”). RMA was selected as a result of an open and competitive national procurement.

While staffing, delivery of services and reorganization were the core issues of the *Organizational Assessment* as the RFP had stated, other aspects of the City were addressed to the extent that they had a direct impact on the core issues. This was limited to a small number of elements:

- Human resources (“HR”), managed by the City.
- Information technology (“IT”) in its many forms, focusing primarily on the various systems, applications and vendors serving Breezy Point.
- Funding, including operating and capital budgets.
- Facilities, addressing the working environment of the staff at City Hall and other work sites.
- Geographic characteristics of the City.
- The nature of physical development in the City.
- Demographic characteristics of the City.

It is important to make certain observations about the organization and scope of this *Organizational Assessment*.

- It understands the fundamental importance of *scale* as the driving factor in addressing the issues in the *Organizational Assessment*. Breezy Point is not just a small city: it is a very small city with a population of less than 3,000 in 11.72 square miles with total authorized staffing of 18 full-time and two part-time personnel.
- It recognizes the City as part of an intergovernmental system, for example sharing fire services with Pequot Lake and being affected today or potentially by decisions of Crow Wing County, the State of Minnesota or the U.S. Government.

- It recognizes the City as providing a wide range of services from law enforcement and the fire service to public information, financial management, growth and human resources.
- It appreciates the professionalism of the City’s staff and the dedication of its elected and appointed leaders and volunteers.
- It knows that the current configuration of services at the City impacts fundamentally how this *Organizational Assessment* addresses its charge from the City Council.
- It applies wherever possible the widely recognized principle of *best practice*. This looks at how various aspects of the City, from selection of its personnel and implementation of standard operating procedures to its deployment of information technology, compares with national standards and the state of the art among comparable municipalities in the United States. This insight draws on the consultant’s decades of experience in hundreds of engagements with local governments in the Midwest and across the United States.
- It applies the concept of *strategic positioning*. This means that the City, through the City Council, should be taking actions now which establish the foundation for efficiency and effectiveness in staffing and the delivery of services which is needed for the City to function both in the short and longer terms as a high-performance organization. Strategic positioning for the City also considers changes which may occur in its environment such as the impact of growth in Breezy Point and its environs, changes in technology, or other statutory, regulatory or judicial factors. Strategic positioning is often characterized as “buying smart, not cheap.”

This *Organizational Assessment* followed a careful, systematic approach in addressing the full scope of work of this engagement. Key tasks here included:

- Conducting a Project Organizational Conference on Thursday, October 5, 2023, with the City Administrator and Assistant City Administrator. This meeting lasted about one hour and a half and was held to establish a common understanding of the specifics of the project plan and assure that all parties had clear agreement on the conduct of the project.
- Reviewing various documents. The *external resources* here included among others: (1) the Minnesota City and Town Accounting and Financial Reporting Standards issued by the State of Minnesota Office of the State Auditor; and (2) Chapter 3, The Statutory City, from the League of Minnesota Cities’ Handbook for Minnesota Cities. *Internal resources* ranged from: (1) the last several years of budgets, audits and management letters; (2) materials prepared by and for City departments such as the Police Department’s 2022 Annual Report and Public Works’ Road Rating Report from 2020; (3) agendas, packets and minutes of the City Council; (4) position descriptions for all titles in the City; and (5) contracts and annual-support agreements with vendors of IT and communications systems.
- Interviewing a total of 29 individuals on a confidential basis. This included the Mayor and all members of the City Council, every full-time employee of the City, and several contractors. These interviews were critical to providing the particular perspective of these individuals and formed a significant part of the informational foundation for this *Organizational*



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**Assessment.** Many subsequent communications took place to address various aspects of this *Organizational Assessment* in greater detail.

- Observing the City’s operations, mainly in connection with interviews of staff. This was important in providing a view of what actually transpires in the work the City performs in its delivery of services, including the quality of the staff’s work, the level of teamwork and issues in related areas such as information systems and communications.
- Addressing best practice. This looked to national standards and how leading, comparable municipalities address issues related to the scope of the *Organizational Assessment*.
- Conducting a midpoint update with the City’s staff on November 15, 2023 to provide a view of how the *Organizational Assessment* was evolving. The consultant presented a preliminary view of major findings and recommendations, and solicited feedback from the staff.
- Having the City’s review panel review the draft of the *Organizational Assessment*, focusing on the findings and recommendations and soliciting the staff’s input and comment for incorporation into the final product by December 1, 2023. The draft of the *Organizational Assessment* had been provided 11 days earlier on November 20, 2023 in order to give the staff ample time to review the draft.
- Revising the *Organizational Assessment* as a result of the staff’s review and preparing it in final form.

This process resulted in full and frank discussion. All aspects of this *Organizational Assessment* have been reviewed and discussed thoroughly with the participants. As well, each of these tasks contributed significantly to the development of the *Organizational Assessment*.

Most important, all of the participants in the *Organizational Assessment* have shown exceptional interest in this effort. Their seriousness and dedication will be as critical as any other factors in having the City be as successful as possible in making decisions about the scope of the *Organizational Assessment*.

Two concepts and related sets of words are fundamental to this *Organizational Assessment*:

*Assessment* involves the words *efficiency* and *effectiveness*.

- *Efficiency* is defined as the City’s application of resources--human, financial, physical or informational--to achieve a specified goal or objective.
- *Effectiveness* refers to the quality of Breezy Point’s delivery of services.

*Priority* considers the words *risk* and *impact*.

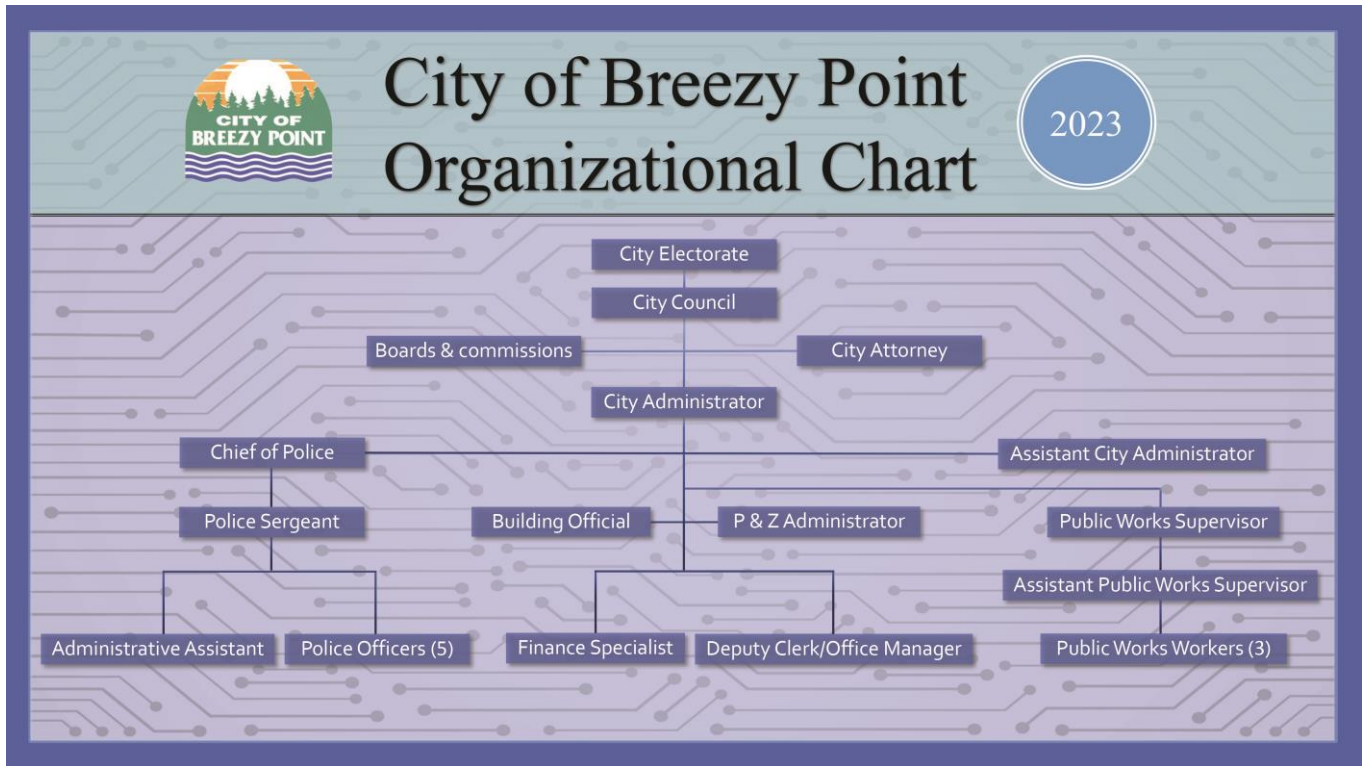
- *Risk* addresses possible adverse consequences to the City from a current or foreseeable situation, or the City’s not taking a given action.

- **Impact** looks at the breadth or depth of the consequences of an action on Breezy Point's residents, visitors, businesses or other parties. This has been stated over the years as the Utilitarian Principle, i.e., the greatest good to the greatest number of people.

This **Organizational Assessment** uses many other acronyms and short names for purposes of easy reference. These include in alphabetical order:

- BPPD – Breezy Point Police Department.
- CAD - Computer-aided Dispatch.
- CIP – Capital Improvement Program.
- CJIS – FBI's Criminal Justice Information Services.
- CRM – Customer Relationship Management.
- CSO – Community Service Officer.
- DRE - Drug Recognition Expert.
- EMT – Emergency Medical Technician.
- ERP – Enterprise Resource Planning System.
- FBI – Federal Bureau of Investigation.
- FTE - Full-Time-Equivalent Personnel.
- FY - Fiscal Year.
- GASB – Governmental Accounting Standards Board.
- GUI – Graphical User Interface.
- HR – Human Resources.
- ISO – Insurance Services Office.
- IT - Information Technology.
- JPA – Joint Powers Agreement.
- LELS \_ Law Enforcement Labor Services.
- LMC – League of Minnesota Cities.
- MCS – Mobile Computing System.
- MSP – Managed Service Provider.
- POSDCORB – Planning, Organizing, Staffing, Directing, Co-ordinating, Reporting, Budgeting.
- POST – Minnesota Board of Peace Officer Standards and Training.
- RFP - Request for Proposals.
- RMA – Resource Management Associates.
- RMS - Record Management Systems.
- UTV – Utility Terrain Vehicle.

The next page presents Breezy Point's Organizational Chart.



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## Section Two Methodology

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This *Organizational Assessment* followed a careful, systematic approach in addressing the full scope of work of this engagement.

### A. PROJECT ORGANIZATIONAL CONFERENCE.

RMA met virtually with the City Administrator and Assistant City Administrator on the afternoon of Thursday, October 5, 2023, to conduct the Project Organizational Conference. This meeting was organized around a five-page agenda which the consultant had prepared, and was held to establish a common understanding of the specifics of the project plan and assure that all parties had clear agreement on the conduct of the project, i.e., the project’s schedule, who would participate in different project tasks and activities, what background information would be needed in the course of the project and what the respective responsibilities of the parties would be.

### B. REVIEW OF BACKGROUND INFORMATION.

In order to understand the background to this effort, RMA reviewed the following types of documents, among others:

- *External documents* included such things as: (1) the Minnesota City and Town Accounting and Financial Reporting Standards issued by the State of Minnesota Office of the State Auditor; and (2) Chapter 3, The Statutory City, from the League of Minnesota Cities’ Handbook for Minnesota Cities.
- *Internal documents* covered several kinds of items including among other things: (1) the last several years of budgets, audits and management letters; (2) materials prepared by and for City departments such as the Police Department’s 2022 Annual Report and Public Works’ Road Rating Report from 2020; (3) agendas, packets and minutes of the City Council; (4) position descriptions for all titles in the City; and (5) contracts and annual-support agreements with vendors of IT systems.

These documents provided background which was important throughout this engagement.

### C. REQUESTS FOR INFORMATION.

RMA requested information from several parties involved in areas related to the scope of the *Organizational Assessment*. These contacts were of two kinds:

- **Governmental interaction**, most significantly including frequent communication with staff of the City. Breezy Point’s personnel were always generous and cooperative in providing critical information on subjects ranging from human resources and financial management to information technology (“IT”) and public works.
- **Vendor-related interaction**, involving various communications with current vendors whose goods and services might have a direct bearing on the **Organizational Assessment**. Most especially this included Widseth as the City’s architect for the new City Hall, vendors of IT and communications systems like Banyon and On Systems, and CliftonLarsonAllen LLP as the City’s independent auditor.

Both of these kinds of contacts provided important information throughout the course of developing this **Organizational Assessment**.

#### D. INTERVIEWS.

RMA interviewed a total of 29 individuals on an individual, confidential basis mainly during the week of October 16-20, 2023 when the consultant was on site in Breezy Point, and also in subsequent telephone calls. This included the Mayor and all members of the City Council, every full-time employee of the City, and contractors. These interviews were critical to providing the particular perspective of these individuals and formed a significant part of the informational foundation for this **Organizational Assessment**. Many subsequent communications took place to address various aspects of this **Organizational Assessment** in greater detail.

#### E. REVIEW PANEL.

RMA’s proposal to Breezy Point at Section 2. B., Project Management, suggested the organization of a review panel as follows:

The City may also wish to establish a review panel. This would be comprised of approximately five of Breezy Point’s key appointed and elected officials. The review panel helps to assure that there is appropriate input into the **Organizational Assessment** from Breezy Point’s key stakeholders. As well, the review panel should continue to be active in the implementation of whatever recommendations may come from the **Organizational Assessment**.

Breezy Point organized the review panel at the beginning of this engagement. RMA held its first interview on site in Breezy Point on Monday morning, October 16, 2023, with this group in order to provide them with an overview of the process of developing this **Organizational Assessment**. The review panel included the City Administrator, Assistant City Administrator, Deputy Clerk/Office Manager, Finance Specialist, Police Sergeant and Assistant Public Works Supervisor.

RMA provided a mid-term update to the review panel on November 15, 2023.

The review panel's key involvement after the mid-term update was to review the draft of the *Organizational Assessment* and provide comment and corrections in advance of RMA's finalizing the *Organizational Assessment* for presentation to the City Council.

#### F. OBSERVATION OF THE CITY'S OPERATIONS.

The observation of the City's operations was important in providing the *Organizational Assessment* with a view of what actually happens in the work the City performs in its delivery of services, including the quality of the staff's work, the level of teamwork, and issues in related areas such as IT.

These observations occurred mainly in connection with the interviews of Breezy Point's staff and at other times when RMA was on site in Breezy Point. They were important in elucidating several aspects of the City's operations and services including but not limited to:

- The level of skill of the staff.
- The effectiveness of supervisors.
- The actual volume of work.
- The level of teamwork among the staff.
- The on-the-job morale of the staff.
- The level of stress.
- The effectiveness of deployment of information technology.
- The areas of frustration which staff experienced or articulated.

#### G. BEST PRACTICE.

Best practice references both (1) documented national standards promulgated by leading professional organizations and (2) what leading local governments do with respect to the issues which the *Organizational Assessment* presents.

Best practice as this affected services, staffing and organization in the City was addressed in two ways.

- RMA referenced the various internal and external documents identified in the previous subsection on Background Information.
- RMA applied its knowledge and experience from involvement in hundreds of local governments around the United States over the last several decades.

#### H. MIDPOINT UPDATE.

RMA conducted a midpoint update with the City's staff on November 15, 2023 to provide a view of how the *Organizational Assessment* was evolving. The consultant presented a preliminary view of major findings and recommendations, and solicited feedback from the staff.

#### I. REVIEW OF THE DRAFT ORGANIZATIONAL ASSESSMENT.

Upon completion of the draft of the *Organizational Assessment*, RMA sent the draft to Breezy Point's review panel on November 20, 2023. This gave the City's staff 11 days to examine the draft in detail in preparation for submission of final review and comment by December 1, 2023.

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**J. PRESENTATION OF FINAL *ORGANIZATIONAL ASSESSMENT*.**

After the staff’s review of the draft and the incorporation of comments and input from the City, the final presentation of the *Organizational Assessment* to the City Council was scheduled for the workshop meeting on January 16, 2024. RMA also provided the City with seven printed copies as well as one copy in pdf format.

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Altogether, the methodology presented in this Section Two of the *Organizational Assessment* had two, important elements:

- It provided substantial, varied input regarding the issues involved in the scope of the *Organizational Assessment*.
- It resulted in full and frank discussion. All aspects of this *Organizational Assessment* have been reviewed and discussed thoroughly with the City, contributing significantly to its development.

Most important, all of the participants in the *Organizational Assessment* have shown exceptional interest in this effort. Their seriousness and dedication will be as critical as any other factors in having Breezy Point be as successful as possible in making decisions about the scope of the *Organizational Assessment*.

## Section Three

### The Context of the Organizational Assessment

Section Three: The Context of the Organizational Assessment Summary of Key Findings and Recommendations
1. The context of the <i>Organizational Assessment</i> has several, key elements which, individually and collectively, fundamentally affect its development as well as the deliberations to follow regarding its findings and recommendations. These elements include among others:
a. Breezy Point’s geographic, topographical and demographic characteristics, especially its rural nature, relatively flat topography, presence of bodies of water, and seasonal population.
b. The City’s continuing, relatively high rate of population growth.
c. Breezy Point’s functioning as a full-service municipality, providing a wide range of services from law enforcement and public works to planning, financial management and human resources.
d. The City’s institutional place as part of an intergovernmental system, for example sharing fire services with Pequot Lake and being affected by decisions of Crow Wing County, the State of Minnesota or U.S. Government.
e. The scale of Breezy Point’s operations, most specifically the volume of services it delivers as a function of its population and land area.
f. The nature of its organization as a Plan A Standard Plan city under Minnesota law.
g. Its serving as a vacation and recreational area, more than tripling its population in Summer.

#### A. OVERVIEW.

This *Organizational Assessment* is affected fundamentally by several factors.

This Section Three, The Context of the *Organizational Assessment*, addresses these factors, discussing specifically how each relates to the core issues of this *Organizational Assessment*--Breezy Point’s services, staffing and organization. This discussion, then, contributes to establishing the foundation for the findings and recommendations which follow in the balance of this *Organizational Assessment*.

#### B. GEOGRAPHIC, TOPOGRAPHICAL AND DEMOGRAPHIC CHARACTERISTICS OF BREEZY POINT.

1. *Breezy Point’s geography, topography and demography affect the essential nature of the City’s staffing and services.*

a. **Geography.**

Breezy Point covers a total area of 12.85 square miles, of which 11.72 square miles or 91 per cent is land and 1.13 square miles or 9 per cent water.



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Two geographic characteristics of Breezy Point are very important for the purposes of this *Organizational Assessment*:

- The City is located in a very rural area. Breezy Point itself has a population density of 200 persons per square mile and Crow Wing County 57, basing both on the 2020 U.S. Census. By contrast, a typical, American suburban community has a population density of approximately 1,000 to 2,000 persons per square mile.
- The City has significant waterfront along Pequot Lake and also contains other, much smaller bodies of water such as Ossawinnamakee, Shaffer and Lynch Lakes. This relatively extensive waterfront and the presence of these bodies of water adds significantly to Breezy Point’s attraction as both a year-round place of residence and location for vacation and leisure. About 95 per cent of this waterfront is privately owned and the City has no role here except for responding to calls for service for Police or the Fire District.

**b. Topography.**

Breezy Point sits at an elevation of approximately 1,230 feet above sea level and has no remarkable characteristics in its topography such as hills or valleys which would affect either development of property or delivery of services, especially in such areas as public safety or public works.

The presence of bodies of water in and adjacent to Breezy Point is its most noteworthy topographic feature.

As well, most roads in Breezy Point are local: the City is traversed by only two State highways, Routes 11 and 39. This kind of road network is typical of similar, small cities in rural areas.

**c. Demography.**

As one saw at the beginning of Section One, Breezy Point’s relatively rapid growth in population has been perhaps the most striking feature affecting this *Organizational Assessment*.

Table 1 is repeated here in order to have this important information incorporated in this part of the *Organizational Assessment*.

**Table 1  
Change in Population**

Year	Population	% Change
1990	432	----
2000	979	126.6%
2010	2,346	139.6%
2020	2,574	9.7%
2023 <sup>1</sup>	2,813	9.29%

<sup>1</sup><https://worldpopulationreview.com/us-cities/breezy-point-mn-population>

The relatively high rate of growth in population over the last few decades which Table 1 shows and appears to be continuing is fundamental to the issues of services, staffing and organization which are the focus of this *Organizational Assessment*:

**C. BREEZY POINT’S FUNCTIONING  
AS A FULL-SERVICE MUNICIPALITY.**

- 1. The fact that Breezy Point provides a wide range of services is fundamental to this Organizational Assessment.*

Municipalities like Breezy Point which share this characteristic are known as full-service.

These services in Breezy Point range from law enforcement and public works to planning, financial management and human resources.

This, then, affects the staffing and funding required to deliver these services as well as the shape of the City’s organization.

**D. BREEZY POINT’S PLACE  
IN ITS INTERGOVERNMENTAL SYSTEM.**

- 1. Breezy Point is part of a complex, intergovernmental system.*

As a municipality, Breezy Point has a wide-ranging set of relationships with other municipalities, special districts, Crow Wing County, the State of Minnesota and the U.S. Government.

These intergovernmental relationships affect the *Organizational Assessment* in important ways.

- Municipalities and special districts. The most significant of these relationships for Breezy Point is its membership in the Pequot Lakes Fire District with the City of Pequot Lakes.

- Crow Wing County. The County Sheriff, among other things, dispatches Breezy Point’s (1) fire services through the Pequot Lakes Fire District and (2) Police Department directly. The County also does all septic and building permitting.
- State of Minnesota. Institutionally, Breezy Point as a municipality is a creature of the State of Minnesota, which has the authority through legislative, judicial and administrative procedures to specify what Breezy Point can do, how it can or must do it, and when it must do it. This affects everything from public works to land use and financial management.
- U.S. Government. Breezy Point is affected in many ways by policies and actions of the U.S. Government in broad terms. These may range from the environment and health policy to funding and energy.

These relationships do not always function in the fashion of a “layer cake.” Rather, what these levels of government do individually and collectively may be viewed more like “marble cake” in their interconnectedness.

However it may occur, the intergovernmental system provides both opportunities and mandates which affect Breezy Point.

### **E. THE SCALE OF BREEZY POINT’S OPERATIONS.**

#### ***1. Scale is a fundamental element in the development of the Organizational Assessment.***

For Breezy Point, scale is related mainly to its small, growing population as of 2023 of an estimated 2,813 permanent residents, more than tripling to roughly 10,000 on weekends in Summer and reaching a maximum of approximately 14,000 on the Fourth of July weekend. This occurs in Breezy Point’s sparsely populated land area of 11.72 square miles.

Scale, then, affects the core elements of this **Organizational Assessment**--what kinds of services the City provides, how many and what kind of staff are needed to deliver these services, and how the City government should be organized to meet the demand for its services.

### **F. THE NATURE OF THE CITY’S ORGANIZATION.**

#### ***1. Breezy Point’s organization as a Plan A Standard Plan city under Minnesota law is fundamental to this Organizational Assessment.***

The City’s RFP for the **Organizational Assessment** asked at page 3 for “Recommendations for reorganization.”

Breezy Point’s City Council, with the advice of the City Administrator, is responsible for deciding, within the limits of State law, the organization of city government.

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**G. BREEZY POINT AS A VACATION AND RECREATION AREA.**

1. *The Organizational Assessment needs to recognize the importance of Breezy Point's being a desirable vacation and recreational area.*

This characteristic of Breezy Point brings more than a tripling of its population in Summer. This influx can affect a range of the City's services from public works to public safety.

The corollary to this increase in population and development is how it affects Breezy Point's services, staffing and organization. This is a common challenge for destination-municipalities like Breezy Point across the United States. Later, this *Organizational Assessment* will, for example, focus on the need for additional policing resources in Summer.

## Section Four

### Policy and Administration

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Section Four: Policy and Administration Summary of Key Findings and Recommendations	
1.	All members of the City Council express substantial satisfaction with the quality of support received from the City’s staff.
2.	The City’s web site provides substantial information and transparency regarding Breezy Point’s policy-making and administration.
3.	The City’s staff works well as a team but its performance would be enhanced by holding regularly scheduled staff meetings around the Council’s regular and workshop meetings.
4.	The City Administrator’s and Assistant City Administrator’s working relationship has continued to evolve in a positive direction. This includes among other things establishing a productive, complementary division of labor.
5.	The important role of the Deputy Clerk/Office Manager may be expected to evolve over the next several years.
6.	The City Administrator should continue to maintain all department and division heads as direct reports to him.
7.	Breezy Point should continue to make active use of the resources of the League of Minnesota Cities (“LMC”).
8.	The City Administrator should be reaching out more proactively to the business community.
9.	Breezy Point should consider publishing an annual report which would collect in one place pertinent information about the activity and accomplishments of all City agencies.
10.	The minutes of meetings of the City Council should contain a much more substantive record of the Council’s deliberations.

#### A. OVERVIEW.

This Section Four, Policy and Administration, focuses on the City Council and City Administrator/Clerk (“City Administrator”) since the City Council and City Administrator work closely as a team in addressing their responsibilities under State law as a Plan A Standard Plan city.

Most fundamentally, the City Administrator serves as the policy advisor to the Council and is then charged with carrying out whatever policies or other decisions the Council may make.

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## B. FINDINGS AND RECOMMENDATIONS.

1. *All members of the City Council express substantial satisfaction with the quality of support received from the City's staff.*

When asked directly in individual interviews, each of the Council members had only positive things to say about the work the staff was doing in support of the Council's meeting their responsibilities.

2. *The City's web site provides substantial information and transparency regarding Breezy Point's policy-making and administration.*

This is important since Breezy Point's web site is the main vehicle by which citizens can access information regarding the full range of the City's services.

Perhaps the most significant information on the web site is the full packet of information regarding each topic on the agenda for each Council meeting. To put this in perspective, the full Council packet sometimes runs in the range of approximately 100 to 250 pages, including all of the detailed memoranda and background information regarding items on the Council's agenda for that meeting.

Where the full packet is posted on the Council's web page by end of the day Wednesday preceding the Council meeting the following Monday evening, both the Council and the public have more than four days to review in detail whatever information may be of interest to them.

This *Organizational Assessment* addresses this information on the City's web site because the information in the Council agenda and packet is critical to the decisions the Council will be making on issues of service, staffing and organization--the core elements of the *Organizational Assessment*.

3. *The City's staff works well as a team but its performance would be enhanced by holding regularly scheduled staff meetings around the Council's regular and workshop meetings.*

To this time, Breezy Point has not had regularly scheduled staff meetings.

Best practice in cities of all sizes is to hold staff meetings both before and after each council meeting, whether a business meeting or workshop. This helps to assure that both preparation for and follow-up to City Council meetings are full and timely.

Given the Breezy Point City Council's schedule of meeting Monday evenings with packets in preparation distributed Wednesday, staff meetings on Tuesday would (1) give time for remaining preparation prior to the distribution of the Council's packets on Wednesday and (b) assure that follow-ups are addressed the day after the Council meets.

Importantly, staff meetings also help to assure that there is full and open communication among the staff, enhancing their sense of teamwork and commitment.

**4. *The City Administrator’s and Assistant City Administrator’s working relationship has continued to evolve in a positive direction. This includes among other things establishing a productive, complementary division of labor.***

The offices of the City Administrator and Assistant City Administrator are located across the hall from each other, facilitating ready communication.

Both of these personnel are new to Breezy Point: the City Administrator began serving in April, 2022 and the Assistant City Administrator came in September, 2022.

The City Administrator and Assistant City Administrator have complementary responsibilities, knowledge and skills which work well together. Table 2 summarizes the annualized percentage of time which each reports that they spend on their respective duties, and a total full-time-equivalent (“FTE”) for each duty.

**Table 2  
 Duties of City Administrator and Assistant City Administrator**

Line	Description of Duties	City Admin %	Asst. City Admin %	Total FTE
1	City Council Support	30%	15%	0.45
2	City Staff Supervision	10%	0%	0.10
3	Finance and Budget	15%	10%	0.25
4	Project Management	30%	25%	0.55
5	Planning	10%	0%	0.10
6	Customer Service	5%	0%	0.05
7	Communications	0%	25%	0.25
8	Technology Support	0%	10%	0.10
9	City Admin. Support	0%	15%	0.15
10	<b>TOTALS:</b>	<b>100%</b>	<b>100%</b>	<b>2.00</b>

It is perfectly natural to expect that these duties and this relationship will continue to evolve, especially given the expected, continued growth of the City’s population and the various recommendations which this *Organizational Assessment* makes.

**5. *The important role of the Deputy Clerk/Office Manager may be expected to evolve over the next several years.***

The Deputy Clerk/Office Manager functions as the “utility infielder” in Breezy Point’s government, working on a wide range of tasks from minutes of the City Council to work orders for Public Works.

The role of the Deputy Clerk/Office Manager is likely to be affected by other changes which this *Organizational Assessment* discusses. Most significantly, these include (1) the establishment of the position of Planning & Zoning Administrator and (2) the procurement and implementation of the City’s new Enterprise Resource Planning (“ERP”) computer system.

The City Administrator should include the Deputy Clerk/Office Manager on different teams and work with her as these changes in her work and the City’s processes take place.

**6. *The City Administrator should continue to maintain all department and division heads as direct reports to him.***

This direct reporting is a critical element of Breezy Point’s efficiency and effectiveness as a municipality.

Given the small size of the City’s staff and the relatively large number of projects and activities taking place in Breezy Point today and into the foreseeable future, the City Administrator needs to maintain this central position.

This also gives the City Administrator a very reasonable span of control and helps to maximize the sharing of information among all of the City’s staff.

**7. *Breezy Point should continue to make active use of the resources of the League of Minnesota Cities (“LMC”).***

The LMC offers a variety of resources which may be helpful to Breezy Point in a wide range of areas from human resources and finance to zoning and policing. These resources can save the staff in City Administration and other areas an enormous amount of time, and support the identification and implementation of best practice across the City government.

**8. *The City Administrator should be reaching out more proactively to the business community.***

This issue was raised by several interviewees.

While Breezy Point has a small commercial sector, it is appropriate for the City Administrator to be proactive in his outreach.

This outreach should also follow whatever policy direction the City Council may set from time to time.



9. *Breezy Point should consider publishing an annual report which would collect in one place pertinent information about the activity and accomplishments of all City agencies.*

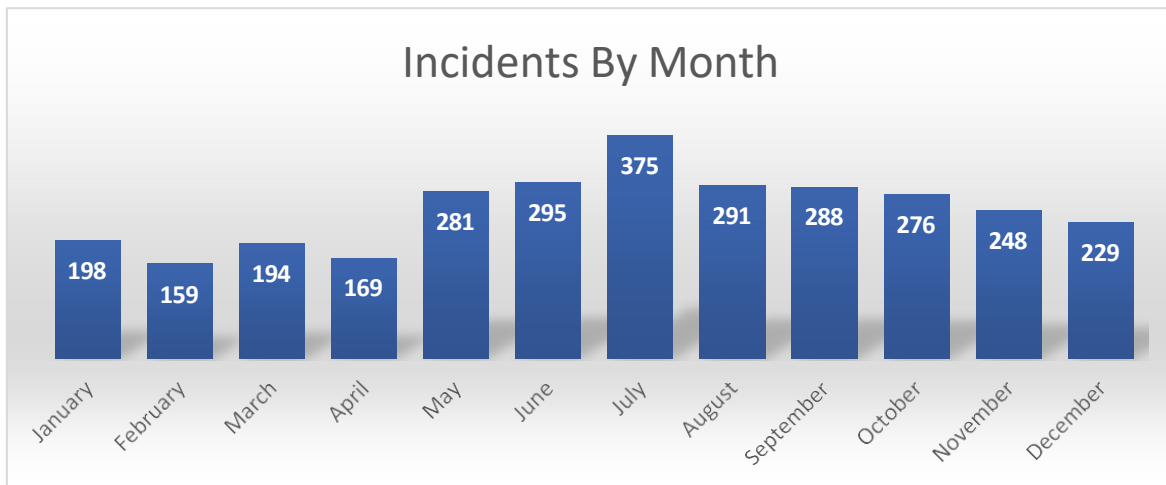
Only the Police Department now publishes an annual report.

An annual report creates an important, comprehensive record for the City. In addition, it provides a significant opportunity for each City agency to review and evaluate what it has accomplished in the last year.

Examples of annual reports are readily available on the internet from small municipalities in other states where this practice is either mandated (as in Massachusetts) or voluntary.

Graph 1 is taken from the Police Department’s 2022 Annual Report.

**Graph 1**  
**Police Department Annual Report**



10. *The minutes of meetings of the City Council should contain a much more substantive record of the Council’s deliberations.*

The City Council’s minutes today are only about two pages in length and have only a very brief, one-, two- or three-sentence summary of what occurred with each item on the agenda. This is the case even where the related Council packets were substantial. For example, the packet for July 5, 2023 was 115 pages, and the packet for August 7, 2023 was 106 pages.

Minutes should provide a sense of what was presented and the discussion which took place. This is especially important where there may have been different points of view expressed or split votes.

The Council’s minutes are a legal and historical record; they should be more robust. This *Organizational Assessment* understands that this will take some additional time for the City Administrator and Deputy Clerk/Office Manager. However, this is time well spent on very important work.

## Section Five Financial Management

Section Five: Financial Management Summary of Key Findings and Recommendations	
1.	Financial management for municipalities in Minnesota is mainly the province of the Office of the State Auditor.
2.	While this <i>Organizational Assessment</i> recommends certain actions to enhance Breezy Point’s financial management as this relates to the scope of the <i>Organizational Assessment</i> , it is not a financial-management study and makes no judgment about the City’s financial management or financial position.
3.	The most significant action which Breezy Point can take to improve the efficiency and effectiveness of its financial management as this relates to the scope of this <i>Organizational Assessment</i> is to replace its current computer system from Banyon Data Systems.
4.	Breezy Point should undertake a full review of its chart of accounts in connection with the replacement of the computer system in order to provide new capabilities such as identifying revenues and expenditures by project and location.
5.	The City should implement purchase-order-based encumbrance accounting as standard operating procedure.
6.	Breezy Point should undertake a focused effort to improve the filing and organization of its financial records.
7.	The City Administrator should proceed with his plan to develop a comprehensive, City-wide Capital Improvement Program (“CIP”) in 2024.
8.	Breezy Point should consider raising the limits in the City’s Finance Policy regarding spending authorized for the City Administrator and department heads for budgeted expenditures without prior approval by the City Council.

### A. OVERVIEW.

Breezy Point’s financial management is ultimately the purview of the City Council but relies day-to-day mainly on the leadership of the City Administrator and the execution of the Finance Specialist working under the supervision of the City Administrator.

With the City’s small size, the Finance Specialist is the only person regularly involved in executing finance-related transactions including such things as accounting, payroll and sewer.

The City Administrator’s main roles week-to-week are in the development and oversight of the City’s budget, and the presentation of claims for the Council’s approval. He also serves as both Treasurer and Investment Officer.

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As a creature of the State of Minnesota, Breezy Point’s financial management is subject to State law and overseen most directly by the Office of the State Auditor.

Significantly, Breezy Point is no longer a small city under Minnesota law, having passed the upper limit of 2,500 in population. This means, for example, that the City now has freedom in structuring its own chart of accounts rather than having to conform with the State-mandated chart of accounts for small cities under 2,500.

This *Organizational Assessment* is not a study of Breezy Point’s financial management; it raises these issues only to the extent that they relate to the specific scope of the *Organizational Assessment*.

### **B. FINDINGS AND RECOMMENDATIONS.**

1. *The most significant action which Breezy Point can take to improve the efficiency and effectiveness of its financial management, services and staffing is to replace its current computer system from Banyon Data Systems.*

This *Organizational Assessment* will discuss the replacement of the Banyon system in greater detail later in Section Eleven, Information Technology and Systems.

Suffice it to say for now that there are two, main reasons compelling this recommendation. First, the Banyon system is functionally obsolete, having the look, feel and functionality of a character-based system from the 1980’s. Second, Banyon has done nothing proactively to address Breezy Point’s needs. It has left the character-based system in place while never even mentioning the availability of its graphical-user-interface (“GUI”)-based systems which are presented on Banyon’s web site. Also, it has never initiated even the suggestion of business-process improvements for Breezy Point.

2. *Breezy Point should undertake a full review of its chart of accounts in connection with the replacement of the computer system in order to provide new capabilities such as identifying revenues and expenditures by project and location.*

The review and possible revision of Breezy Point’s chart of accounts fits within the scope of this *Organizational Assessment* by making the work of both the Finance Specialist and various departments faster, easier and better informed.

Since it is no longer a small city of less than 2,500 population as defined by Minnesota law, Breezy Point is free to construct its own chart of accounts.

While the Office of the State Auditor has a recommended chart of accounts, this is not mandatory. See <https://www.osa.state.mn.us/media/hgepff52/uniformcoa.pdf>.

The development of Breezy Point’s new chart of accounts should be done from the outset in full consultation with the City’s independent auditor.

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As well, the vendor of the City's new computer system should have experience from which to draw and good suggestions to make regarding the chart of accounts. It is important to note here that different vendors have different approaches to the structuring of a chart of accounts; this should be an area of specific inquiry for Breezy Point in its evaluation of vendors.

**3. *The City should implement purchase-order-based encumbrance accounting as standard operating procedure.***

This has been viewed as best practice in municipal government for more than 100 years.

The policy issue which this presents for Breezy Point is what the minimum amount of a purchase for which a purchase order is required ought to be. The basic notion here is that purchases subject to later approval for larger amounts ought to have prior authorization.

For a small city like Breezy Point, an amount of approximately \$500 might make sense; this would establish appropriate fiscal controls without becoming burdensome for the City's departments.

One notes here that the City of Breezy Point Finance Policy, under the section headed Department Head Authority, states that "Department Heads are given authority to spend up to \$1000 for any purchase deemed necessary." And later: "In most instances 2 quotes are needed for purchase of items whose costs exceed \$1000."

The City should confer with its independent auditor to see what might make sense in this region and under State law.

Also, in the secure, decentralized financial environment which the new ERP system enables, entering a purchase requisition is no extra work for the user-department since they would have to input this same information into the Accounts Payable system in any event. Note that City offices now handwrite almost all of this same information; thus, there's no additional time or effort required on the part of the user-departments.

**4. *Breezy Point should undertake focused effort to improve the filing and organization of its financial records.***

This was one of the top concerns of the Finance Specialist.

The problem here is that this is something the Finance Specialist needs to do herself which cannot be delegated. Between the extra time which it now takes to maintain the Banyon system and the hours she will need to be involved as a central participant in the procurement and implementation of the new ERP, it's hard to see when or how she may find time for this undertaking.

Also, this project cannot be undertaken on a full basis until there is more room to reorganize these records.

5. *The City Administrator should proceed with his plan to develop a comprehensive, City-wide Capital Improvement Program (“CIP”) in 2024.*

The Capital Improvement Program (“CIP”) which the City Administrator is planning to undertake in 2024 will be a major opportunity for Breezy Point to guide its growth; it will also have a significant impact on the City’s services and staffing.

A comprehensive CIP, which looks ahead at least five years and covers the full scope of municipal needs, is a fundamental element of prudent city government.

The CIP is essential to the *Organizational Assessment* since it specifies (1) what the City intends to do, (2) when and how it intends to do it, and (3) what impact this may have on services, staffing and organization.

Breezy Point today does not have a CIP. The only document of this kind which is in place currently is Public Works’ Capital Improvement Plan, which is built around the inventory of its equipment.

To put a CIP in Breezy Point in perspective, the replacement value of equipment in Public Works alone is \$2,220,750. As well, the replacement value of the City’s facilities is millions of dollars.

The first issue for Breezy Point is to define what constitutes a capital item.

The current definition of a capital asset in the City of Breezy Point Capital Assets and Surplus Property Policy reads as follows: “A capital asset is any item or property that has a value of \$5,000 or more per asset and a life expectancy of greater than one year.”

This policy does not meet what has been standard practice in local government for many years. A capital asset, for example, is usually defined as having a life expectancy of at least five years.

The City should look to its independent auditor to help here. This may include reference to standards of organizations like the Governmental Accounting Standards Board (“GASB”), the national organization which, among other things, promulgates definitions of this kind.

Breezy Point does not need to “reinvent the wheel” in developing its CIP. Samples of CIP’s from similar local governments are readily available on the internet.

Importantly, this needs to be a team-driven process from the very beginning, involving Breezy Point’s major departments with capital needs. This should include but not limited to Police and Public Works, among others. It should also take cognizance of the capital plans of the Pequot Lakes Fire District.

6. *Breezy Point should consider raising the limits in the City's Finance Policy regarding spending authorized for the City Administrator and department heads for budgeted expenditures without prior approval by the City Council.*

The City's Finance Policy, under the section headed Department Head Authority on page 1, currently sets limits for purchases not requiring specific approval by the City Council at \$5,000 for the City Administrator and \$1,000 for department heads.

The fact of the matter is that the City already reviewed and approved these purchases when the City Council voted to adopt the annual budget. Thus, this second vote is simply not necessary since it adds nothing to the process.

Breezy Point should consult with its independent auditor and other knowledgeable parties to see what more appropriate limits might be.

## Section Six Public Works

Section Six: Public Works Summary of Key Findings and Recommendations	
1.	The services provided by Public Works and the related need for staffing are affected as much as any function in Breezy Point by (1) the City's growth in population and (2) the decisions which the City may make regarding physical growth and development.
2.	The staff of Public Works operates at a very high level of efficiency and effectiveness.
3.	A top priority for Public Works is the construction of a new garage. The current facility is at capacity and its limitations are adversely affecting the workers' productivity.
4.	Breezy Point should establish a policy which provides a specified level of funding for road maintenance as part of the City's annual budget.
5.	A fourth Public Works Worker may very well be needed in the next five years.
6.	Public Works should be open to procuring and implementing specialized software for such purposes as route optimization and pavement management.
7.	The Public Works Supervisor should recapture significant, productive time from the implementation of (1) the new ERP and (2) other recommendations which this <i>Organizational Assessment</i> makes regarding IT.
8.	Breezy Point should address Public Works' need for various small equipment.
9.	The Public Works Supervisor estimates that the sewer plant should have about 10 more years of useful life before needing a significant upgrade or replacement.
10.	Breezy Point should make appropriate interim improvements to the sewer system.
11.	Public Works' cost of overtime is very low.

### A. OVERVIEW.

The Public Works Division has several, important responsibilities in Breezy Point related to the City's infrastructure over its land area of 11.72 square miles including mainly:

- Maintenance of the City's approximately 60 miles of accepted roads and 14 miles of minimum-maintenance roads.
- Snow plowing of these roads.
- Maintenance of the City's sewer system with 850 accounts, serving about 30 per cent of the City's population.
- Maintenance of the City's wastewater treatment plant, commonly known as the sewer plant.
- Maintenance of City-owned facilities including buildings and parks.
- Routine maintenance of the City's rolling stock.
- Maintenance of cemeteries.
- Construction of roads to approximately 800 feet.

The nature of this work changes relatively significantly from season to season, especially with the significant influx of population in Summer.

The City's Deputy Clerk/Office Manager has an important role in receiving and processing work orders for Public Works.

Public Works operates with a staff of five including one Public Works Supervisor, one Assistant Public Works Supervisor and three Public Works Workers. There is also one seasonal worker who is on board from approximately April to October.

Contractors are being used for specific projects such as seal coating of roads and construction or reconstruction of roads over approximately 800 feet.

The Public Works garage is located next to the City Hall parking lot. Public Works also has a small shed behind the City Hall where it stores equipment in the off-season.

## **B. FINDINGS AND RECOMMENDATIONS.**

- 1. The services provided by Public Works and the related need for staffing are affected as much as any function in Breezy Point by (1) the City's growth in population and (2) decisions which the City may make regarding physical growth and development.*

Breezy Point needs to recognize the fundamental impact on services and staffing in Public Works which growth in population and development have.

The City Council, City Administrator and land-use related agencies should be aware of this situation to the extent that the law allows.

- 2. The staff of Public Works operates at a very high level of efficiency and effectiveness.*

It is quite remarkable that a staff of fewer than five working personnel is able to carry out the range of responsibilities which Public Works has at the level of efficiency and effectiveness it does.

As one example, snow plowing for a four-inch snowfall is reported to be completed in about eight to 10 hours with three plows, one grader and one pickup, and with no help from contractors. Quality is demonstrated by the reported small number of calls and complaints with snow plowing which the City receives.

The new ERP system and the new CRM application which this *Organizational Assessment* recommends will give the City a better way to track and evaluate (1) the work of the staff in Public Works and (2) the quality of service provided by Public Works as measured in part by the number and nature of interactions with the CRM.



- 3. A top priority for Public Works is the construction of a new garage. The current facility is at capacity and its limitations are adversely affecting the workers' productivity.***

This ***Organizational Assessment*** recommends the replacement of the Public Works garage as a top-tier Priority I project.

The current structure lacks the ability to handle its current equipment efficiently, no less any new equipment. Put another way, Public Works should not have to “shoe horn” its equipment, which has a replacement value of \$2,220,750. The effort which the staff must now expend in moving equipment around the garage was described by one Public Works employee as “a waste of time.” Two examples illustrate the issue here.

First, Public Works will be taking delivery of a new large plow truck very shortly. The staff of Public Works has stated that it will need to move five pieces of equipment in order to make space for the new plow truck. This is terribly inefficient and also raises the probability of equipment being damaged in the process of being moved.

Second, when the consultant was inside the garage with the Assistant Public Works Supervisor, the Assistant Supervisor pointed out that he could not access equipment he needed for work that day. This happened since the garage had only one door on the other side of the garage, and another piece of equipment which was in the way of the door could not be moved since it had a dead battery. A public works garage should have doors on all sides, facilitating the use of equipment as needed.

Further, it is reasonable to expect that the City may need to add equipment for Public Works as Breezy Point and the scale of Public Works' responsibilities grow.

It is not within the scope of this ***Organizational Assessment*** to evaluate sites. This will be a major project which should involve the services of an architect with specific experience in municipal public-works facilities.

- 4. Breezy Point should establish a policy which provides a specified level of funding for road maintenance as part of the City's annual budget.***

Where road maintenance is an annual, ongoing part of the City's core services, the commitment to a specified level of funding for this function is appropriate. Moreover, the deferral of maintenance on roads is by its nature fiscally imprudent.

As an example, this policy could be based on a certain percentage of the City's overall General Fund budget. Under this approach, Breezy Point's spending a hypothetical five per cent of the adopted FY2023 budget of \$3,250,115 would have produced \$162,505.75.

The City Administrator and Public Works Supervisor should begin discussing this issue in advance of development of the FY2025 budget, bringing a recommended policy to the City Council at the appropriate time.

5. *A fourth Public Works Worker may very well be needed in the next five years.*

The three Public Works Workers are well occupied year-round: they are functioning at their maximum and have no slack capacity as a group. Any substantial, new workload likely would involve the addition of a fourth Public Works Worker.

The need for a fourth Public Works Worker will be affected mainly, as just mentioned in subparagraph B.1., by growth in population and the scale and nature of development which may occur.

Alternatively, the City may wish to consider hiring a second part-time worker either year-round or for Summer.

The Public Works Supervisor and City Administrator should begin to have discussions about the advantages or disadvantages associated with each strategy.

The Public Works Supervisor should monitor this situation and keep the City Administrator up-to-date as the demand for services may increase and affect staffing. The new ERP and CRM should also provide better information about Public Works' services and staffing.

6. *Public Works should be open to procuring and implementing specialized software for such purposes as route optimization and pavement management*

Section Eleven on Information Technology and Systems also discusses this topic.

This *Organizational Assessment* addresses route optimization and pavement management as two classes of software which have been used widely in the public-works profession for several decades. The notion here is that, as good a job as Public Works in Breezy Point now does as an example in snow plowing, there is always room for improvement.

Software for route optimization was originally developed several decades ago to optimize the routing of school buses and has since been adapted for snow plowing.

Pavement management provides a systematic way for a municipality like Breezy Point to (1) evaluate the current condition of its roads and (2) set priorities for actions related to the condition of its roads. It also supports the work which the Public Works Supervisor does in planning for work on roads and which the City Administrator will be leading in the development of the CIP.

The Assistant City Administrator and Assistant Public Works Supervisor should work as a team in exploring packages for route optimization and pavement management which are both functionally appropriate and fiscally prudent.

**7. *The Public Works Supervisor should recapture significant, productive time from the implementation of (1) the new ERP and (2) other recommendations which this Organizational Assessment makes regarding IT.***

The Public Works Supervisor stated in his interview that he spends about 85 per cent of his time on “inside” work in the office and 15 per cent outside. The 85 per cent of his inside time is divided roughly into thirds among (1) budgeting and financial transactions, (2) customer interaction with residents and staff, and (3) projects and planning including such things as expansion of the sewer plant.

It is important to note here that the Public Works Supervisor as no support staff and does all of his own paperwork and processing, including financial transactions, by himself.

Thus, the advent of the ERP should be of especially great benefit to him individually. Among other things, the ERP’s new chart of accounts should enable budgeting and accounting by project and location which can be particularly important in Public Works.

As this *Organizational Assessment* discusses later in Section Eleven on Information Technology and Systems, Breezy Point ought to identify a strategy for addressing its City-wide need for an application for handling requests, inquiries or complaints from citizens, known generally as “CRM” for Customer Relationship Management. While the City’s current web site has a very basic contact system through the “How Do I...” tab on the home page, this has no specificity regarding the kind of request for service which the citizen may wish to make, and does not automatically feed the citizen’s information to the appropriate department for action.

Other aspects of this *Organizational Assessment*’s recommendations regarding IT which should benefit the Public Works Supervisor include applications like pavement management and route optimization as well as more training the toolset in Microsoft 365.

**8. *Breezy Point should address Public Works’ need for various small equipment.***

Small equipment mentioned by the staff in Public Works included (1) a second Utility Terrain Vehicle (“UTV”), (2) a new chipper, and (3) an additional mower.

**9. *The Public Works Supervisor estimates that the sewer plant should have about 10 more years of useful life before needing a significant upgrade or replacement.***

This estimate obviously depends on the pace and type of growth which may occur in Breezy Point in the next several years.

**10. *Breezy Point should make appropriate interim improvements to the sewer system.***

At the same time as the preceding subparagraph estimated 10 years until something significant may need to be done with the sewer plant itself, the City should be anticipating various interim improvements to the sewer system.

Again the nature and cost of these interim improvements will depend on the pace and type of growth which may occur in the City.

***11. Public Works' cost of overtime is very low.***

Breezy Point's budget for overtime in Public Works in FY2024 is \$2,500 or 1.3 per cent of the budgeted total of \$190,884 for Compensation (wages). This is a very low percentage for a municipal public-works agency.

Employees in Public Works also may take compensatory time off instead of pay for overtime.

As well, overtime may vary fairly significantly with the occurrence of major, weather-related events or natural disasters.

## Section Seven Police

Section Seven: Police Summary of Key Findings and Recommendations	
1.	The Breezy Point Police Department is generally recognized as providing a high level of service to the City.
2.	The Police Department’s most immediate need is providing additional sworn or non-sworn personnel to assist with the tripling of the City’s population from less than 3,000 year-round to approximately 10,000 on summer weekends and 14,000 on the Fourth of July.
3.	The Police Department’s building should meet this agency’s requirements for approximately 10 more years. The one, immediate improvement which Breezy Point may wish to consider is a secure entryway to protect parties fleeing violence or the threat of violence.
4.	Breezy Point should anticipate the need for an additional Police Officer as the City continues to grow.
5.	The Police Department’s cost for overtime is well within the limits of sound practice.
6.	The Police Department’s work has been supported in important ways by the City’s providing various technologies.
7.	Resolving the issue of policing of the Breezy Point Disc Golf Course is beyond the scope of this <i>Organizational Assessment</i> .
8.	Having two monitors with each workstation at Police headquarters would enable Police personnel to access and view different, related information simultaneously.

### A. OVERVIEW.

The Breezy Point Police Department (“BPPD” or the “Police Department”) is staffed with seven full-time sworn personnel. These include one Chief of Police, one Police Sergeant and five Police Officers. In addition, the Police Department has one part-time Police Officer who works about 20 hours per week and one full-time Police Administrative Assistant. In 2022, the Police Department responded to 3,003 calls for service. (As a rough rule of thumb, calls for service in a municipality of Breezy Point’s character tend to run about one to one with population.) As the Police Department’s Annual Report for 2022 stated, “This number [3,003] is up 21% from 2021 and 55% from 2020.” The Police Department is dispatched by the Crow Wing County Sheriff’s Dispatch Division. The Police Department has about five walk-ins (persons who appear unexpectedly at the reception desk) per day during the hours of 7:30 A.M. to 4:30 P.M. when the reception desk is staffed.

The Police Sergeant and Police Officers work 11- or 12-hour shifts, providing 1.5 to 2 sworn personnel on patrol duty most of the time. Table 3 on the next page shows these hours and how they are structured on weekdays and weekends (weekends include Friday, Saturday and Sunday).

**Table 3**  
**Police Department Shift Hours**

Police Unit	Weekday Hours	Weekend Hours
Day Car	6:00 A.M.- 5:00 P.M.	6:00 A.M.- 6:00 P.M.
Mid Car	12:00 Noon-11:00 P.M.	12:00 Noon-12:00 Midnight
Overnight Car	7:00 P.M.-6:00 A.M.	7:00 P.M.-7:00 A.M.

The Police Sergeant staffs the day car including working alternate weekends, and the Police Chief works 7:00 A.M. to 5:00 P.M. Monday through Thursday. The Police Chief is a working Chief and responds promptly to incidents when called. The Police Department also has three certified drug recognition experts (“DRE’s”) and shares a drone with Crow Wing County. Bidding for shifts is done by seniority.

Peak activity for the Police Department occurs in the month of July with the influx of seasonal residents and visitors. Daily activity peaks year-round, as one usually sees in similar municipalities, (1) from approximately 12:00 noon to 12:00 midnight, and (2) on Friday and Saturday. Indeed, data from 2022 show 71 per cent of the Police Department’s activity occurring between noon and midnight, and only 29 per cent between midnight and noon. Police Officers report that they spend about 80 per cent of their time on the road in patrol duties and 20 per cent in the office doing incident reports and other paperwork.

An unusual aspect of the Police Department’s organization is its serving as first responders for medical calls, which it has been doing since 2006. While this is not common for police agencies even in relatively rural areas like Breezy Point, it has proven very effective and in 2015 was awarded special recognition by the Humphrey School of Public Affairs at the University of Minnesota. In order to help meet this responsibility, two of the sworn Police personnel are trained paramedics and one is an Emergency Medical Technician (“EMT”). Each of the three personnel who are medically qualified handles about four or five medical calls a week, with peak activity occurring with peak population in Summer. Having these local medical resources is also important where Breezy Point is reported to have a relatively significant percentage of elderly persons among its population.

Breezy Point also provides 20 hours per week of Police services to Pelican Township at a cost to the Township of \$54,500 in 2023.

The Police Department shares a building with Station II of the Breezy Point Fire District at 8361 County Road 11, about 150 yards from City Hall.

Mutual aid is established with the Crow Wing County Sheriff and several municipalities. While mutual aid has been organized well, the effectiveness of its response is limited by the small size (except for the Sheriff’s Office) and distance among the participating agencies.

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## B. FINDINGS AND RECOMMENDATIONS.

**1. *The Breezy Point Police Department is generally recognized as providing a high level of service to the City.***

All interviewees who were asked responded very positively when questioned about the quality of service provided by the Police Department.

This positive view was reinforced by data collected as part of this *Organizational Assessment* regarding clearance rates and criminal investigations, as presented in Table 4 on the next page. In brief, these data showed outstanding clearance rates for almost all types of crimes. This is a tribute to the Police Department’s personnel and Breezy Point’s public.

**2. *The Police Department’s most immediate need is providing additional sworn or non-sworn personnel on Summer weekends to assist with the tripling of the City’s population from less than 3,000 to approximately 10,000 on weekends and 14,000 over the Fourth of July.***

This is an urgent situation--a top priority City-wide--which needs to be solved before Summer, 2024. The uncomfortable fact for Breezy Point is that having only two patrol units on duty when the City’s population on Summer weekends swells to roughly 10,000--and a reported 14,000 over the Fourth of July--presents extraordinary risk to the City.

Solutions to this need are affected by the nature of Breezy Point and its environment. Any consideration of the feasibility of one or more of these possible solutions should be discussed with the City Attorney at the very beginning before the staff spends significant time evaluating them. Some possible approaches to this issue follow with discussion of each.

- **Community Service Officers (“CSO’s”).** CSO’s are non-sworn individuals who undertake certain duties, aimed at maximizing the time which sworn officers have to pursue work which only sworn officers can do. CSO’s complement, but do not replace, sworn officers by providing additional Police presence and additional “eyes and ears” for the Police Department.

The City Administrator should meet with the Chief of Police at the beginning of these discussions and identify the Chief’s thoughts regarding CSO’s including, for example, how many CSO’s might be needed for the high season in Breezy Point.

The Chief of Police has expressed his concern with having limited backup for CSO’s who are non-sworn and unarmed since Breezy Point typically has only two patrol units on the road covering the 36 square miles of Breezy Point and Pelican Township. However, having limited backup is inherent in having only two patrol units on duty.

CSO’s need to be given training appropriate to their role, responsibility and authority. They are also typically provided with a unique uniform which identifies them as associated with the local police agency, and associated equipment such as radios for communication.

**Table 4**  
**Police Department Criminal Investigations: Clearance Rates**  
**Calendar Year 2022**

Crime	# of Cases Opened	# of Cases Cleared	% of Cases Cleared
Murder and nonnegligent homicide	0	0	N/A
Aggravated assault	1	1	100%
Violent crime (simple assault, stalking, harassment)	9	9	100%
Rape	1	1	100%
Arson	1	1	100%
Robbery	0	0	N/A
Burglary	2	2	100%
Larceny-theft	23	6	26%
Property crime	13	8	62%
Motor vehicle theft	5	3	60%
Child Maltreatment	3	3	100%
Fraud/Identity Theft	15	7	47%
Firearms Violation	1	1	100%
Drug Investigations (Felony)	4	4	100%
Equivocal Death Investigations	5	5	100%
Vulnerable Adult	4	4	100%
Pre-Employment Background Inv	4	4	100%
Liquor License Background Inv	4	4	100%
Gun Permit Background	32	32	100%
Forensic Device Extraction (Assist Other Agency)	3	3	100%
<b>TOTALS</b>	<b>130</b>	<b>98</b>	<b>N/A</b>



Other cities in Minnesota, including but not limited to Maplewood and Coon Rapids, currently use CSO's for a variety of purposes such as delivery or pickup of evidence, taking non-criminal reports, parking enforcement, assisting with animal complaints, vehicle lockouts, and traffic control which does not require a sworn officer:

CSO's should be 21 years of age or older and have educational attainment appropriate to this position. As one example, the City of Virginia Beach, Virginia, with its expansive beach and high volume of visitors, formerly hired first-year law students as CSO's.

Breezy Point should also confer with its employment attorney in order to be sure that no issues related to collective bargaining may be involved.

Similarly, the City should review (1) requirements of the Minnesota Board of Peace Officer Standards and Training ("POST") and (2) statutes which may affect CSO's.

Financial considerations with CSO's include (1) setting a competitive rate of pay in order to attract well qualified individuals and (2) assuring that affordable housing is available during the high season.

- **Overtime for incumbent Police Officers.** While overtime may be feasible for some police departments, two factors make this solution questionable for Breezy Point.

First, where Breezy Point's sworn officers are already working 11- and 12-hour shifts, extending their work times beyond these hours may increase risk to their safety and performance. One oceanfront agency contacted in the course of this *Organizational Assessment* stated that they routinely had sworn officers plan on working four hours of overtime in high season. However, that agency's personnel only worked eight-hour shifts, giving them much more ability to meet this kind of seasonal demand: their working an additional four hours of overtime would only bring their Police Officers to a total of 12 hours worked in a row, which is what a regular tour by itself now constitutes for Breezy Point's Police Officers.

Second, where Breezy Point's Police Department is very small, there are likely very few sworn personnel who would be available for or interested in this Summer duty on a regular basis.

- **Reserve officer.** Police agencies in Minnesota often use reserve officers year-round, not just in Summer. Thus, when trained and supervised properly, reserve officers can provide an important complement to a police department's sworn personnel. Minnesota Statutes define reserve officer at Section 626.84, Subdivision 1 as follows:

(e) "Reserve officer" means an individual whose services are utilized by a law enforcement agency to provide supplementary assistance at special events, traffic or crowd control, and administrative or clerical assistance, and shall include reserve deputies, special deputies, mounted or unmounted patrols, and all other employees or volunteers performing reserve officer functions. A

**reserve officer's duties do not include enforcement of the general criminal laws of the state, and the officer does not have full powers of arrest or authorization to carry a firearm on duty [emphasis added].**

- **Part-time officer.** Like reserve officers, part-time officers can work up to an average of 20 hours per week year-round. Unlike reserve officers, they have "...full powers of arrest or authorization to carry a firearm while on active duty." Minnesota Statutes Section 626.84, Subdivision 1.
- **Mutual aid.** Mutual aid refers to having sworn personnel from one or more law-enforcement agencies respond in special circumstances to incidents in another, nearby agency.

The issue for Breezy Point is that mutual aid, especially in Summer, asks one very small agency which likely itself has only 1, 2 or 3 sworn officers on duty, to respond to Breezy Point as the requesting agency. Obviously, this would then leave the potentially responding agency itself short-handed and at risk.

Were Breezy Point in a more populous area with larger police departments, mutual aid might make sense in meeting the City's seasonal needs here. However, this does not appear to be a good solution for Breezy Point.

This *Organizational Assessment* has offered here some options for Summer coverage for the Police Department. The City and Police Department should keep an open mind about solutions which might make sense.

3. *The Police Department's building should meet this agency's requirements for approximately 10 more years. The one, immediate improvement which Breezy Point may wish to consider is a secure entryway to protect parties fleeing violence or the threat of violence.*

The Police Department has organized its space well. Its implementation of security in the building has been certified by the Federal Bureau of Investigation ("FBI") Criminal Justice Information Services Division ("CJIS"). Moreover, important technologies have been incorporated in the building.

The Chief of Police was asked directly about his expectation of the current building's useful lifetime. He estimated that the building should support the Police Department well for approximately 10 more years to roughly 2033. This, of course, depends on the rate and nature of growth in Breezy Point and the ways in which this may affect the demand for services and related staffing from the Police Department.

The outstanding issue which the building presents, not uncommon among small departments without 7x24x365 staffing of the reception area, is that a party fleeing violence or the threat of violence has nowhere to go and be protected when they come to the Police station when the front desk is not staffed from 4:30 P.M. to 7:30 A.M. Agencies in this kind of situation have built secure entries, locked from the inside, with a direct line to Sheriff's Dispatch, and cameras providing real-time viewing from Dispatch of both the outside and inside.

**4. *Breezy Point should anticipate the need for an additional Police Officer as the City continues to grow.***

Breezy Point's current complement of Police personnel is well occupied and productive, with a seventh sworn Police Officer's position having been added as part of the FY2023 budget.

At some point in the next several years, it may make sense fiscally and operationally for the Police Department to add an additional Police Officer. This will depend on the nature of the City's growth as well as the type and volume of Police activity.

This *Organizational Assessment* identifies this additional Police Officer as Priority II, given the uncertainty regarding exactly when this position may be justified. Adding this Police Officer will also entail ancillary costs such as a Police vehicle and its maintenance as well as duty equipment such as radios, uniforms, weapons, cameras and IT.

**5. *The Police Department's cost for overtime is well within the limits of sound practice.***

Breezy Point's budget for overtime for sworn personnel in Public Safety (the Police Department) in FY2024 is \$35,000 out of a total of \$661,429, or 5.29 per cent. This is well within the reasonable limit of 10 per cent for expenditures on overtime for police agencies and does not indicate any abuse of overtime.

**6. *The Police Department's work has been supported in important ways by the City's providing various technologies.***

The City Council and City Administrator have budgeted funds for technologies which respond to the needs of the Police Department. Perhaps the most obvious of these have been body worn cameras, implemented in 2022, and in-car cameras.

Where Breezy Point's Police Officers are often on patrol by themselves in a rural area with only one other working Police unit, these technologies have significant benefit for the Police Officer's safety as well as their operational performance.

**7. *Resolving the issue of policing of the Breezy Point Disc Golf Course is beyond the scope of this Organizational Assessment.***

This *Organizational Assessment* is well aware of the continuing controversy regarding the policing of the Breezy Point Disc Golf Course.

The fact of the matter is that this situation is far beyond the scope and intent of this *Organizational Assessment* and requires a special study all by itself.

8. *Having two monitors with each workstation at Police headquarters would enable Police personnel to access and view different, related information simultaneously.*

In the normal course of their work, Breezy Point's Police Officers need to access information from multiple sources.

Having two monitors connected with each workstation would enhance the efficiency and effectiveness of the Police Officers' work at relatively small cost.

## Section Eight Fire Service

Section Eight: Fire Service Summary of Key Findings and Recommendations	
1.	The organization of the Pequot Lakes Fire District (the “Fire District”), effective May 9, 2022, has enhanced fire services for Breezy Point, largely as a result of (1) the structure of the Fire District’s governance between Breezy Point and Pequot Lakes and (2) the Fire District’s adoption of its Capital Improvement Program.
2.	The Fire District should undertake a full evaluation of the remaining useful lifetime of Engine 1, the 2003 Peterbilt, stationed in Breezy Point.
3.	The Fire District should be recruiting call firefighters actively. As of this date, it has filled only 23 of 30 budgeted positions.
4.	The Fire District should be monitoring the demands on the Fire Chief’s time as these may evolve, making changes as appropriate.
5.	The Fire Chief should be provided with a desk, chair and networked computer at Station 2 in Breezy Point.
6.	The Fire Chief should have full, secure, decentralized access to Breezy Point’s new ERP system.
7.	The addition of the new ladder truck should enhance the Fire District’s capabilities and its responsiveness to Breezy Point significantly.

### A. OVERVIEW.

Fire service for Breezy Point is provided by the Pequot Lakes Fire District (the “Fire District”), a special-purpose district which was formed by means of a Joint Powers Agreement (“JPA”) between the Cities of Breezy Point and Pequot Lakes, effective May 9, 2022. The Fire District also serves Jenkins City, Jenkins Township, Loon Lake Township, Pelican Township and Poplar Township, who collectively pay 25 per cent of the annual cost of the Fire District.

Before the organization of the Fire District, Breezy Point contracted with the City of Pequot Lakes as the prime contractor for delivery of fire services.

The Fire District has a part-time Fire Chief who works on the Fire District’s business about five hours a week and is paid \$5,000 per year. Also, there are two Assistant Chiefs who are each paid \$2,500 per year, a Captain and 19 call firefighters. About 12 or approximately 50 per cent of the Fire District’s personnel are residents of Breezy Point. Mandatory training occurs two times a month.

The Fire District has two stations. Station 2 at 8361 County Road 11 in Breezy Point, about 150 yards from the City Hall, is in the same building with the Breezy Point Police Department and houses four apparatus:

- Engine 1 - 2003 Peterbilt - 1,250 GPM Pump, 1,000-gallon Tank, Class A Rating
- Tanker 2 - 2022 Freightliner - 3,000-gallon Tank, 1,000 GPM Pump
- Utility 2 - 2019 Ford F350 Wildland Truck
- 2022 Inmar Rescue Boat

Station 1 is located at 4638 Main Street in Pequot Lakes and houses 7 apparatus:

- Engine 3 - 2014 Freightliner – 1,250 GPM Pump, 1,000 Gallon Water Tank, Class A Rating
- Utility 1 - 2004 F550 Wildland/Rescue
- Rescue 2 - 1999 Ford Ambulance - SCBA and equipment, RIT vehicle
- Tanker 1 - 2000 GMC - 2,000-gallon water tank with pump
- Tanker 3 - 2007 Freightliner 3,700-gallon Water Tank
- Engine 2 - 1995 Ford, 1,250 GPM, 1,000-gallon Water Tank
- 2018 Kubota - Wildland/Rescue UTV

Station 1 and Station 2 are 4.9 miles from each other with a travel time of approximately 8 minutes.

The Fire District holds a rating of 4 from the Insurance Services Office (“ISO”), the national, private firm which has a complex system for rating the effectiveness of agencies in the fire service. The top rating is a 1. As a call department, the Fire District’s rating of 4 is very respectable. It should also be noted that this rating’s components for the Fire District have improved significantly over the last 13 years from a total score of 38.21 to 61.89 out of a maximum available of 105.5. The ISO’s main subtraction of points came in the area of water supply where the score was 16.67 out of a maximum available of 30. This reflects not having a municipal water system in place and having to rely mainly on tankers for water supply to fight fires.

The main impact of an ISO rating is on the cost of insurance to property owners.

The Fire District generally responds with a crew of three firefighters. Table 5 shows the approximate distribution of incidents to which the Fire District responds in a year.

**Table 5**  
**Percentage Distribution of Fire Calls by Type**

Call Type	%
Wildland	30%
Highway	30%
Structural	20%
Equipment Malfunction	10%
False Alarm	10%
<b>TOTAL</b>	<b>100%</b>

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## B. FINDINGS AND RECOMMENDATIONS.

- 1. The organization of the Pequot Lakes Fire District (the “Fire District”), effective May 9, 2022, has enhanced fire services for Breezy Point, largely as a result of (1) the fire district’s structure of its governance between Breezy Point and Pequot Lakes and (2) the Fire District’s adoption of its Capital Improvement Program.***

The Joint Powers Agreement to Provide Fire Protection and Rescue Services (the “JPA”) provides in Article VI, Organization and Governance, for joint governance between the Cities of Breezy Point and Pequot Lakes. Each City is represented on the Fire District’s Board by its Mayor, an appointee of the Mayor and an appointee of the City Council.

Significantly, five affirmative votes from the six-member Board are required for any order of the Board to pass, thus assuring a high degree of consensus between Breezy Point and Pequot Lakes on any given item.

Since its organization about 18 months ago, the Fire District and its Board have functioned well. This is reflected positively in the Board’s voting to (1) adopt its new CIP and (2) make major improvements in its fire equipment, most notably the purchase of the new ladder truck, expected to be delivered around January, 2024.

- 2. The Fire District should undertake a full evaluation of the remaining useful lifetime of Engine 1, the 2003 Peterbilt, stationed in Breezy Point.***

An apparatus like this generally has an expected lifetime of roughly 20 to 25 years.

Engine 1 is now 20 years old and is characterized by the Fire Chief, with respect to the financial and operational burden of its ongoing maintenance, as his “problem child.”

Of fundamental concern is the fact, as reported by the Fire Chief, that Engine 1 is out of service at the repair shop for approximately two weeks every time it requires maintenance. This is reported to occur more than once a year. Its absence from the front line of the District’s apparatus stationed in Breezy Point is that the City is then without this apparatus for a relatively significant period of time, adversely affecting the Fire District’s responsiveness to calls for service in Breezy Point. It should be noted that this is the only fire engine regularly housed in Breezy Point.

- 3. The Fire District should be recruiting call firefighters actively. As of this date, it has filled only 23 of 30 budgeted positions.***

While the Fire District’s complement of call firefighters has been relatively stable in the last few years, it remains below its authorized strength.

The fire service nationally is having great difficulty in recruiting and retaining call firefighters. This is a function of social and economic changes in American life which have intensified over the last approximately 20 years.

The Board and Chief should address this issue directly, exploring new or different strategies which may be productive.

- 4. The Fire District should be monitoring the demands on the Fire Chief's time and the evolution of this position, making changes as appropriate.***

The Fire Chief states that he now works an average of five hours per week.

Like other issues in this *Organizational Assessment*, the demands on the Fire Chief may evolve as a function of the type and pace of development in the Fire District.

The Board should be examining this issue as part of its annual budgetary process, making changes in the Fire Chief's work, time and compensation as may be appropriate.

- 5. The Fire Chief should be provided with a desk, chair and networked computer at Station 2 in Breezy Point.***

This should be done forthwith.

- 6. The Fire Chief should have full, secure, decentralized access to Breezy Point's new ERP system.***

Among other things, the Fire Chief is the fiscal manager of the Fire District.

Breezy Point becomes the fiscal agent of the Fire District effective January 1, 2024.

Like any other department head, the Fire Chief should have full, secure, decentralized access to the ERP system. This is especially true where the time he has to spend on non-firefighting duties should be able to be used as efficiently as possible.

- 7. The addition of the new ladder truck should enhance the Fire District's capabilities and its responsiveness to Breezy Point significantly.***

The Fire District does not now have a ladder truck; the new apparatus is expected to be delivered around January, 2024.

While this apparatus will be stationed in Pequot Lakes, it provides a major asset for Breezy Point. With a travel time of approximately eight minutes to the center of Breezy Point and minutes less to Breezy Point's westerly environs, there should be a reasonable response time when the ladder truck is dispatched.



## Section Nine Planning & Zoning

Section Nine: Planning & Zoning Summary of Key Findings and Recommendations
1. Planning & Zoning is in a major transition, with the first full-time appointee to the position of Planning & Zoning Administrator expected to begin work with the new fiscal year starting January 1, 2024.
2. The nature of work which other City offices do will likely change as the Planning & Zoning Administrator's position gets established and evolves.
3. The Planning & Zoning Administrator and Assistant City Administrator should work as a team in exploring property-related information which the State or County may have available.
4. Breezy Point should explore how computer-based systems may be able to support the work of Planning & Zoning.
5. The Planning & Zoning Administrator should report monthly to the City Council on their work.

### A. OVERVIEW.

Planning & Zoning has been a significant function in Breezy Point's government, especially given the relatively high rate of growth which the City has experienced over the last approximately three decades.

Staffing of this function has occurred by contract, with an individual working about two days or 15 to 20 hours per week since 2011.

The City Administrator first presented the idea of establishing the full-time position of Planning & Zoning Administrator to the City Council at a meeting on the FY2024 budget in June, 2023. This was occasioned by the need for the City to address several issues including among others the updating and revision of the City's zoning ordinance from the 1990's, and the review of licensing for short-term rentals. In addition, the Council was concerned with issues related to customer service involving Planning & Zoning, mainly the inability of customers to get issues addressed and resolved readily because of the short hours worked by the contractor.

The Council, upon the City Administrator's recommendation, voted to include the Planning & Zoning Administrator's position in the Minnesota Preliminary Budget and Levy for September 30, 2023, effective with Fiscal Year 2024, beginning January 1, 2024.

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## B. FINDINGS AND RECOMMENDATIONS.

***1. Planning & Zoning is in a major transition, with the first full-time appointee to the position of Planning & Zoning Administrator expected to begin work with the new fiscal year starting January 1, 2024.***

This *Organizational Assessment* is in an odd position, charged with addressing an organization which has not yet become operational with its new staffing.

A few aspects of the launching of this new position and organization are especially important.

- Assuring that the new appointee has both the professional and interpersonal skills to address the full range of the job.
- Emphasizing customer service as a top priority.
- Establishing strong working relationships with City Council, City Administrator and the City's staff, and boards and committees.
- Having the Planning & Zoning Administrator provide a detailed, monthly report of their activities, quantified as well as reasonably possible, to the City Administrator and City Council.
- Having the City Administrator and City Council be open to feedback from the Planning & Zoning Administrator and new ideas which this person may bring with them or suggest from time to time.
- Having the City Council and City Administrator work with the Planning & Zoning Administrator to establish clear priorities for this person.
- Keeping track of the time the Planning & Zoning Administrator spends on each of their several tasks. This should be helped greatly by the new ERP and chart of accounts.
- Having the Planning & Zoning Administrator keep the City Administrator informed almost daily.

***2. The nature of work which other City offices do will likely change as the Planning & Zoning Administrator's position gets established and evolves.***

As one example, the Deputy Clerk/Office Administrator handles several tasks in support of Planning & Zoning which the new Planning & Zoning Administrator should now assume. While the time involved here cannot be readily quantified, this is a good, finite example of one way in which some changes will begin to occur.

- 3. The Planning & Zoning Administrator and Assistant City Administrator should work as a team in exploring property-related information which the State or County may have available.***

Breezy Point should take a fresh look at this information about 12 months after the Planning & Zoning Administrator has been working in the City and, thus, has a better idea of what might be helpful to his work.

Teaming with the Assistant City Administrator will provide Breezy Point with two views of what might be beneficial here.

- 4. Breezy Point should explore how computer-based systems may be able to support the work of Planning & Zoning.***

Planning & Zoning today makes no effective use of computer technology. This is not in any way a criticism but simply an observation which reflects the more generally limited deployment of IT in the City.

The new Planning & Zoning Administrator should work with the Assistant City Administrator to see what applications of IT in this area may be useful to Breezy Point.

There is no need to “reinvent the wheel” here. There is a wealth of resources among professional and other organizations which understand the needs and fiscal constraints of smaller cities like Breezy Point.

- 5. The Planning & Zoning Administrator should report monthly to the City Council on their work.***

As a new, high-profile position in Breezy Point, it is important for the City Council to know what the activities of the Planning & Zoning Administrator have been each month for the first year.

The Council also needs to recognize that the first several months of the Planning & Zoning Administrator’s tenure will constitute a learning curve.

The Planning & Zoning Administrator’s monthly reports need to be frank and substantive, quantifying their work where reasonably possible and informative.

## Section Ten Human Resources

Section Ten: Human Resources Summary of Key Findings and Recommendations
1. Human resources (“HR”) policies and practices are as critical as any other factor in the assessment of the City’s services, staffing and organization.
2. Breezy Point has acted positively and proactively in the last two years in addressing compensation of City employees.
3. Implementing weekly staff meetings, tied to meetings of the City Council, should aid significantly in building teamwork and motivation among the City’s staff.
4. The planned revision of Breezy Point’s Personnel Policy in 2024 should bring this important element of City government current with best practice and legal requirements.
5. Breezy Point should be funding the participation of the City’s staff in Minnesota State-level, regional and national professional associations.

### A. OVERVIEW.

Policies and practices regarding human resources (“HR”) constitute the bedrock of the City’s staffing and delivery of services. This is a matter of quality not quantity: even though Breezy Point has just 18 full-time and two part-time employees, it needs to follow best practice appropriate to the size and nature of its organization.

First and foremost, the City’s staffing and delivery of services is a people business. Thus, effective HR policies and practices determine to a very large degree the overall efficiency and effectiveness of the City’s staffing.

Put another way, the City and this *Organizational Assessment* must address HR before a meaningful analysis of staffing can occur.

This discussion of HR also recognizes the City’s responsibilities, notwithstanding its small size, for the full cycle of HR-related activity including:

- Recruitment.
- Selection.
- Orientation.
- Training.
- Professional development.
- Supervision.
- Evaluation.
- Mentoring.
- Counseling.
- Career advancement.

- Physical environment.
- Compensation.
- Retention/Turnover.
- Discipline.

The balance of this Section Ten presents findings and recommendations regarding various aspects of HR as this relates to the charge of the *Organizational Assessment*.

## B. FINDINGS AND RECOMMENDATIONS.

### 1. *Breezy Point has acted positively and proactively in the last year in addressing compensation of City employees.*

The City Council and City Administrator should be commended for having acted on the need to assure that compensation of the City’s employees was competitive. This was accomplished by the City Council’s voting to enact two resolutions. First was Resolution 19-2022, A Resolution Implementing a Salary Plan and Setting Employee Wages, enacted on October 3, 2022 and effective January 1, 2023, for non-union positions. Second was Resolution 12-2023, A Resolution Implementing a Salary Plan, enacted on September 5, 2023, and effective January 1, 2024, for non-union positions. Compensation for certain employees in the Police Department represented by Law Enforcement Labor Services (“LELS”) Local #259 is determined by contractual agreement.

Prior to taking these actions, the City’s compensation did not compare well. As the City Administrator stated in his memorandum to the City Council on August 1, 2023, “Breezy Point positions are an average of 21% lower than those of Brainerd, Baxter, and Little Falls.”

This significant improvement in compensation should benefit the motivation and retention of the City’s employees.

### 2. *Implementing weekly staff meetings, tied to meetings of the City Council, should aid significantly in building teamwork and motivation among the City’s staff.*

This recommendation was addressed previously in Section Four, Policy and Administration, but bears repeating here since it is a central element of effective human-resources practices

### 3. *The planned revision of Breezy Point’s Personnel Policy in 2024 should bring this important element of City government current with best practice and legal requirements.*

The City Administrator plans to launch this undertaking in 2024. This effort should have a few, key components. It should:

- Be staff-based, following the model of the Review Team for this *Organizational Assessment*. This buy-in by the staff from the very beginning is essential to the success of this effort.

- Not “reinvent the wheel,” drawing on resources from the League of Minnesota Cities and other parties involved in local government.
- Maintain agendas for and minutes of its meetings so there is a record of the group’s work and its key decisions.
- Keep the City Council informed of its progress, including presenting a final draft of the revised Personnel Policy for discussion at a workshop meeting of the Council.

**4. *Breezy Point should be funding the participation of the City’s staff in Minnesota State-level, regional and national professional associations.***

This participation has several important benefits to Breezy Point.

- It is a very important way to bring direct, practical knowledge back to Breezy Point where this knowledge otherwise might not be obtained.
- This knowledge can help the City be more cost-effective in its operations and enhance the productivity of the staff.
- Participation at professional meetings can create a network of colleagues with whom Breezy Point’s staff can consult regarding issues of importance to the City.

The support which Breezy Point has been providing for its staff’s participation should be expanded now to other organizations. Table 6 on the next page shows (1) organizations currently funded and (2) organizations recommended for funding.

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**Table 6  
 Professional Associations: Current and Recommended**

City Agency	Current	Recommended
City/City Administrator	League of Minnesota Cities	League of Minnesota Cities
City/City Administrator	MN. City/County Management Association	MN. City/County Management Association
City/City Administrator	International City/County Management Association	International City/County Management Association
Deputy Clerk/ Office Manager	Municipal Clerks and Finance Officers Association	Municipal Clerks and Finance Officers Association
Finance Specialist	-----	Municipal Clerks and Finance Officers Association
Finance Specialist	-----	Minnesota Government Finance Officers Association
Finance Specialist	-----	Government Finance Officers Association
Police	Minnesota Chiefs of Police Association	Minnesota Chiefs of Police Association
Police	-----	International Association of Chiefs of Police
Public Works	-----	American Public Works Association
Public Works	-----	American Public Works Association: Minnesota Chapter
Planning & Zoning	-----	American Planning Association
Planning & Zoning	-----	American Planning Association: Minnesota Chapter

## Section Eleven

### Information Technology and Systems

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Section Eleven: Information Technology and Systems Summary of Key Findings and Recommendations	
1.	This <b>Organizational Assessment</b> is concerned with information technology and systems (“IT”) because of the direct impact which IT has on the efficiency and effectiveness of the City’s services and staffing.
2.	The main recommendation related to IT which this <b>Organizational Assessment</b> makes is that the City replace the current application-software system from Banyon Data Systems which the City first licensed in 2006.
3.	Breezy Point should undertake a careful process to carry out this effort, beginning with establishing a user-committee and carrying out a detailed needs assessment, and concluding with the execution of a performance-based contract with the successful vendor and structured implementation. This also includes engaging the services of an independent consultant with significant experience in the procurement and implementation of municipal ERP systems to assist in this major decision.
4.	The Assistant City Administrator should serve as Breezy Point’s lead on issues related to IT.
5.	The Review Panel organized as part of this <b>Organizational Assessment</b> should continue to act as the City’s ongoing user-group in addressing issues in IT as they may arise from time to time.
6.	Breezy Point should continue to engage the services of On Systems for technical support of the City’s information technology.
7.	The City should be open to evaluating third-party software products which may be helpful in addressing standalone functions of the City government.
8.	Breezy Point should work with On Systems in evaluating the Microsoft 365 Government product.
9.	The City should review the level of skill with Microsoft 365 of individual members of the staff and provide additional, periodic training as may be appropriate.
10.	Breezy Point should be providing work-related, third-party software to employees and agencies who need it.
11.	The City needs to determine its strategy for software to manage citizens’ requests for service, complaints and City-service-related information. This is generally known as a Citizen Relationship Management or “CRM” application.
12.	All forms on the City’s web site should be fillable pdf format.
13.	The City Administrator and Assistant City Administrator should each have their own color laser printer.



## A. OVERVIEW.

This *Organizational Assessment* is concerned with information technology and systems (“IT”) because of the direct impact which IT has on the efficiency and effectiveness of the City’s services and staffing. Systems can either enhance or undercut productivity and performance in municipal government. Put another way, IT sits at the core of staffing and the delivery of services in Breezy Point in the current age of systems and technologies in municipal government.

General-purpose municipal systems are known as enterprise resource planning or “ERP”. ERP systems address a wide range of municipal functions from financial management and payroll/human resources to utility billing and collection as well as permitting.

Breezy Point’s main systems in use today include the following by function:

- ERP: Banyon Data Systems: <https://banyon.com>.
- Office: Microsoft 365.
- Police: Computer-aided Dispatching/Records Management System/Mobile Computing System (“CAD/RMS/MCS”), licensed from CentralSquare by Crow Wing County.
- Web site: CivicPlus: <https://www.civicplus.com>.

Support for Breezy Point’s IT is provided mainly by On Systems. The City also has an annual-maintenance agreement with Banyon Data Systems for its ERP, and contracts with Digital Horizons (<https://digitalhorizonsmn.com>) for support of audio/visual technologies.

## B. FINDINGS AND RECOMMENDATIONS.

### 1. *Breezy Point needs to act urgently to replace the current application-software system from Banyon Data Systems which the City first licensed in 2006.*

Breezy Point’s staff has serious concerns with the current application-systems it uses from Banyon Data Systems of Burnsville, Minnesota. Originally licensed by vote of City Council in September, 2006, these applications include:

- Payroll version 10.57, released 7/5/23.
- Fund Accounting version 13.00, released 8/22/23.
- Utility Billing version 10.932 released 7/14/23 (there is a newer version 10.938 released 9/20/23 which Breezy Point plans to deploy very soon).
- Cemetery version 10.66 released 3/18/22.

This is a relatively small subset of Banyon’s full portfolio of products as presented on the company’s web site.

Two, main reasons compel this recommendation.

- The Banyon system as deployed in Breezy Point is functionally obsolete, having the look, feel and functionality of a character-based system from the 1980’s.

- Banyon has done nothing proactively to address Breezy Point’s needs. It has left the character-based system in place while never even mentioning the availability of its graphical-user-interface (“GUI”)-based systems which are presented on Banyon’s web site. Where GUI-based applications have been in common use in municipal government for more than 20 years, it is not clear why the GUI versions of Banyon’s applications have never been deployed in Breezy Point. Also, Banyon has never initiated even the suggestion of business-process improvements for Breezy Point.

Other, significant limitations exist in these applications as deployed. For example:

- End-user interfaces are awkward to use. This is described as the “look and feel” of an application.
- No secure decentralization of processes has been implemented. This would enable end-users in each City department to do their own input and inquiries on a secure basis, independent of the Finance Specialist and saving her a large amount of time.
- Not all modules are integrated with Banyon’s Fund Accounting product on a transaction-driven basis, causing extra work for the Finance Specialist.

As an example, when the consultant asked the Finance Specialist to provide a report of payments to vendors by fiscal year, she called Banyon who told her that this could not be done by a standard report and would have to involve her exporting this information to Excel and then further editing it. This reporting function should have been a complete non-issue.

Based on her previous experience with a more robust ERP product, the Finance Specialist estimates that she could regain 25 per cent of her productivity with a better system. This would amount to a fully loaded productivity gain to the City of \$29,011.10 per year or \$145,055.50 over five years.

Other departments in Breezy Point likely would see similar but smaller productivity gains, amounting more or less to 5 per cent of the time of the person who does financial, payroll, purchasing and payables transactions for that department. As examples, this would include the Police Sergeant and Public Works Supervisor.

**2. *Breezy Point should undertake a careful, thorough process to carry out the procurement and implementation of the new ERP system.***

The process of procuring and implementing a new, municipal ERP system is fraught with challenges and very time-consuming for the participants.

Breezy Point should take the following steps in working through this process. The City should:

- Establish a broadly representative user-committee on the model of the review panel for this *Organizational Assessment*. The user-committee will have a critical role throughout the process.

- 
- Engage an independent consultant with specific knowledge and experience in the procurement and implementation of municipal ERP systems.
  - Document a project plan with all tasks and subtasks, and the estimated timeline for each task and the project overall.
  - Catalogue specific applications which Breezy Point may wish to include in this procurement.
  - Undertake a rigorously detailed needs assessment. Among other things, this should begin with identifying limitations which Breezy Point has encountered with the current system.
  - Once the applications and needs have been identified, do a wide-ranging market search to identify vendors whose systems may be able to address Breezy Point’s needs well.
  - Draft two performance-based documents: (1) a request for proposals (“RFP”) and (2) a vendor-contract.
  - Distribute the RFP and vendor-contract together to prospective vendors.
  - Execute a detailed, highly structured process of evaluating vendors’ proposals. This process will have been specified in the RFP.
  - Negotiate the performance-based contract with the preferred vendor of the new ERP system, including a detailed plan for implementation and acceptance of each application system.
3. *The Assistant City Administrator should serve as Breezy Point’s lead on issues related to IT.*

Breezy Point needs to have one person who is the single point of contact for all aspects of IT.

In his relatively brief time with the City, the Assistant City Administrator has showed a serious interest in and talent for IT. He has, for example, taken responsibility for the City’s web site using the CivicPlus product, and has established a good working relationship with On Systems, supporting the City’s IT infrastructure.

As a general proposition, it is relatively common in smaller cities like Breezy Point to have the person holding the title of Assistant City Administrator (or similar assistant’s title) be responsible for IT.

4. *The Review Panel organized as part of this Organizational Assessment should continue to act as the City’s ongoing user-group in addressing issues in IT as they may arise from time to time.*

End-user involvement from the outset is essential to the success of any deployment of IT.

The first meeting of this *Organizational Assessment* at 8:00 A.M. on Monday, October 16, 2023, was held with the City’s Review Panel. This group represents all major City departments including City Administration, Finance, Police and Public Works

At that meeting, the consultant emphasized among other things the ongoing role which the Review Panel would have in implementing whatever recommendations might come out of the *Organizational Assessment*.

IT in whatever form, ranging from the ERP to the City’s web site, now calls for the active role of the Review Panel. The group’s work should be coordinated actively by the Assistant City Administrator, engaging other members of the City’s staff as appropriate.

As one example, the Review Panel must play a central role in the recommended future replacement of the ERP.

One key to the ongoing success of the Review Panel is its keeping detailed agendas and minutes of its meetings. This practice has been showed for decades to be critical to success in IT projects.

**5. *Breezy Point should continue to engage the services of On Systems for technical support of the City’s information technology.***

On Systems acts as the City’s contractor for support of various aspects of IT. This kind of firm is known in the IT industry as a managed service provider or “MSP”. Among other things, the services provided by On Systems range from communications networking and office systems using Microsoft 365 to system backups and desktop support.

Outsourcing this work is entirely appropriate, given Breezy Point’s small scale and the critical nature of IT to the functioning of the City as a whole. The cost of this service, which has ranged between approximately \$20,000 and \$35,000 per year over the last three years excluding purchases of equipment, is reasonable.

**6. *The City should be open to evaluating third-party software products which may be helpful in addressing standalone functions of the City government.***

This subject arose in interviews with personnel from Public Works regarding snow plowing.

Specifically, there are two categories of software which may have value to Breezy Point and Public Works in particular.

First, route optimization was originally developed to optimize the routing of school buses and has also been adapted to snow plowing.

While Public Works generally receives high praise for its snow plowing, one must always keep an open mind to doing better.

Second, pavement-management software (1) evaluates the condition of roads in the City and (2) suggests priorities for paving. Pavement management also supports the work which the Public Works Supervisor does in planning for work on roads; this will also be important to the City Administrator in his leading the development of the City's CIP.

The Assistant City Administrator and Assistant Supervisor of Public Works should work as a team in exploring packages for route optimization in snow plowing which are both functionally appropriate and fiscally prudent.

More generally, other departments in the City should be looking for third-party software which may, likewise, provide benefit to their own operations or City-wide.

7. ***Breezy Point should work with On Systems in evaluating the Microsoft 365 Government product.***

Microsoft 365 Government offers several versions with different levels of enhanced security.

Especially where the Breezy Point Police Department is using Microsoft 365 with the rest of the City, this evaluation makes sense.

8. ***The City should review the level of skill with Microsoft 365 of individual members of the staff and provide additional, periodic training as may be appropriate.***

Microsoft 365, the successor to Microsoft Office, combines products from Office like Word, Excel and PowerPoint, which users throughout the City use frequently.

Thus, skill in Microsoft 365 is basic to enhancing the staff's productivity overall. As one example, a new ERP will almost certainly have wide-ranging integration with Microsoft 365 and its tools.

Training on Microsoft 365 should be done at least annually or as called for when new versions of this product with added features and functions may be released.

9. ***Breezy Point should be providing work-related third-party software to employees and agencies who need it.***

As one example, a member of the Police Department paid for his own license for Adobe products.

The Assistant City Administrator should sit with each employee of the City and see what software would enhance the efficiency and effectiveness of their work for the City.

In this connection, the City should have a line item in its budget of approximately \$2,000 per year to provide for end-user software which users may suggest from time to time, subject to review by the Assistant City Administrator and City Administrator.

**10. *The City needs to determine its strategy for software to manage citizens' requests for service, complaints and City-service-related information. This is known generally as a Citizen Relationship Management or "CRM" application.***

CRM applications have been used by municipalities for more than 20 years.

The essence of a CRM application is self-service: a citizen should be able to reach out to the City at any time, submit their request and have the CRM application automatically forward that request to the responsible City office. Moreover, the CRM system should be able to establish a time limit for action by the responsible City office, such as 24 or 48 hours, depending on the nature of the request. The departmental responses can then be reviewed by the City Administrator in order to make sure that the City is delivering an appropriate level of service to its customers.

Breezy Point today has no such application deployed. All that it has in place is the "How Do I..." tab on the home page of the City's web site in the CivicPlus website application. This is a very basic contact system and has no specificity regarding the kind of request for service which the citizen may wish to make; it also does not automatically feed the citizen's information to the appropriate department for action.

The City has two, main options for addressing the CRM application.

First, it should include this in the RFP for the new ERP system. Over the years, some but not all ERP vendors have either incorporated this application in their own portfolio or integrated a third-party product.

Second, Breezy Point could acquire a standalone, third-party application.

As with the procurement of any software, Breezy Point first will need to determine the features and functions it wishes to have in the CRM package, and then identify leading firms which can provide good CRM systems for small cities like Breezy Point.

**11. *All forms on the City's web site should be fillable pdf format.***

Breezy Point's customers should be able to complete fillable pdf's on line as a routine process. This also has the benefit of producing completely legible document for use by the City.

**12. *The City Administrator and Assistant City Administrator should each have their own color laser printer.***

These key personnel should not have to get up from their desk and leave their office every time they need to print something. The color laser printer is needed since much of their work involves color documents of various kinds.

The only marginal cost to these printers is the one-time purchase which is in the range of approximately \$250 to \$300 for each printer with an estimated lifetime of three to five years.

## Section Twelve Summary of Staffing

Section Twelve: Summary of Staffing Summary of Key Findings and Recommendations
1. Solving the need for additional staffing in the Police Department in Summer must be Breezy Point's top priority for staffing.
2. While the addition of full-time personnel, such as another Police Officer or Public Works Worker, may be justified as a result of population growth, development or other factors in the next few years, Breezy Point should evaluate each of these individually as facts may recommend.
3. Adding part-time employees may be appropriate in certain cases.
4. Contracting should be reviewed as an appropriate strategy in specific cases.
5. Interlocal cooperation may be an option worth considering further for staffing and delivery of specific services.

### A. OVERVIEW.

This Section Twelve, Summary of Staffing, brings together in one place the *Organizational Assessment*'s main findings and recommendations regarding staffing.

Breezy Point today has a total of 18 full-time personnel and two part-time personnel. Table 7, which follows on the next page, summarizes Breezy Point's current and recommended full-time staffing.

### B. FINDINGS AND RECOMMENDATIONS.

**1. Solving the need for additional personnel in the Police Department in Summer must be Breezy Point's top priority for staffing.**

Having only two patrol units scheduled for duty when Breezy Point's population balloons from less than 3,000 to a reported 10,000 on Summer weekends with a maximum of 14,000 on the Fourth of July is an exceedingly high risk.

As recommended in Section Seven, Police, the City Administrator and Chief of Police should address this as an urgent priority, to be cured with the support of City Council before Summer, 2024.

**Table 7**  
**Summary of Current and Recommended City Staffing**

Line	Position Classification	Current Positions Authorize	Current Positions Filled	Total Positions Recomm	Change In Positions
1	City Administrator	1	1	1	0
2	Assistant City Administrator	1	1	1	0
3	Deputy Clerk/Office Manager	1	1	1	0
4	Planning & Zoning Administrator	1	1	1	0
5	Finance Specialist	1	1	1	0
6	Chief of Police	1	1	1	0
7	Police Sergeant	1	1	1	0
8	Police Officer	5	5	5	0
9	Police Administrative Assistant	1	1	1	0
10	Public Works Supervisor	1	1	1	0
11	Asst. Public Works Supervisor	1	1	1	0
12	Public Works Worker	3	3	3	0
	<b>TOTALS:</b>	<b>18</b>	<b>18</b>	<b>18</b>	<b>0</b>

2. *While adding full-time or part-time personnel, such as another Police Officer or Public Works Worker, may be justified in the next few years as a result of population growth, development or other factors, Breezy Point should evaluate each of these individually as facts may recommend.*

This *Organizational Assessment* finds no evidence to suggest that there is an immediate need for any new, full-time positions.

Having said that, Breezy Point may very well be approaching the time when the demand for additional services as the result of growth and development calls for the addition of one or more new positions.

Individual departments should be maintaining data which help to inform this decision. The aggregation of this data may be assisted by the implementation of the new ERP system and other applications which this *Organizational Assessment* suggests.



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The City Administrator should meet with the department head to review each of these situations as part of the annual budgetary process or otherwise as called for.

**3. *Adding part-time employees may be appropriate in certain cases.***

Breezy Point currently has only two, part-time employees, one in Police and the other in Public Works.

Individual department heads should examine the use of part-time employees with the City Administrator as part of the City's strategy for delivering services.

Most immediately, part-time employees may help to address the need for additional Police presence in Summer.

**4. *Contracting should be reviewed as an appropriate strategy in specific cases.***

Breezy Point today uses contracting on a limited basis.

The most prominent examples of contracting are (1) the outsourcing of support for information technology to On Systems and (2) Public Works' contracting for larger road-construction projects.

Breezy Point should be open to contracting work as individual situations may arise.

**5. *Interlocal cooperation may be an option worth considering further for staffing and delivery of specific services.***

Breezy Point currently is involved in interlocal cooperation in important areas including (1) fire service through the Pequot Lakes Fire District, (2) mutual aid in policing, and (3) public-safety dispatching through the Crow Wing County Sheriff's Office.

Having a common civic culture is the single, most important factor in considering interlocal cooperation.

The main challenges which interlocal cooperation faces are (1) determining governance in the delivery of a service and (2) finding an agreeable way to share costs.

This *Organizational Assessment* endorses the idea of exploring interlocal cooperation in appropriate circumstances, understanding that each, particular case may have important advantages or disadvantages to each of the participating parties.

## Section Thirteen Summary of Services

Section Thirteen: Summary of Services Summary of Key Findings and Recommendations
1. The nature of future growth in Breezy Point’s population and development surrounds discussion of the City’s services.
2. Breezy Point overall delivers a high quality of services.
3. The main area where the quality of service does not meet this high standard is in responsiveness to contacts involving Planning & Zoning. This situation should be remedied when the new Planning & Zoning Administrator begins work on January 1, 2024.
4. The new CRM application system which this <i>Organizational Assessment</i> recommends for review should help to provide better information to the City about the quality of its services.

### A. OVERVIEW.

This Section Thirteen, Summary of Services, consolidates the main findings and recommendations which this *Organizational Assessment* makes regarding Breezy Point’s delivery of services.

### B. FINDINGS AND RECOMMENDATIONS.

- The nature of future growth in Breezy Point’s population and development surrounds discussion of the City’s services.*

Growth, more than any other factor, will have the most thoroughgoing impact on Breezy Point’s services.

While this *Organizational Assessment* is very comfortable with the assessment it has presented of current services, it is nearly impossible to speculate responsibly about what the nature or pace of future growth in the City may be.

- Breezy Point overall delivers a high quality of services.*

No person interviewed had anything but positive comments about the City’s current delivery of services, with the one exception in the next subparagraph here.

- The main area where the quality of service does not meet this high standard is in responsiveness to contacts involving Planning & Zoning.*

Most of these comments had to do with the lack of availability of staff to answer customers’ queries. This situation has existed because Breezy Point has had only a part-time contractor working in Planning & Zoning about two days or 15 to 20 hours per week.

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This situation should be remedied when the new Planning & Zoning Administrator begins work on January 1, 2024.

4. *The new CRM application system which this Organizational Assessment recommends for review should help to provide better information to the City about the quality of its services.*

Breezy Point today has no systematic way to collect either descriptive or quantitative information regarding its services.

The CRM application, depending on its specific features and functions, may be able to compile and help analyze this information in a way which cannot be done today.

## Section Fourteen Summary of Organization

### Section Fourteen: Summary of Organization Summary of Key Findings and Recommendations

1. This *Organizational Assessment* sees no need for any reorganization of Breezy Point’s City government.
2. Breezy Point may wish to review its organization in approximately five years when the nature and impact of the next period of growth is more clear.

#### A. OVERVIEW.

The RFP issued by Breezy Point for this *Organizational Assessment* asked, among other things in the Scope of Services and Deliverables on page 3, for “Recommendations for reorganization.”

This Section Fourteen, Summary of Organization, addresses the question of what changes, if any, should be made to Breezy Point’s current municipal organization, given the preceding findings and recommendations of this *Organizational Assessment*.

The issue of reorganization can only be addressed after the *Organizational Assessment* has evaluated services and staffing and, thus, has a basis for making findings and recommendations which are well grounded.

#### B. FINDINGS AND RECOMMENDATIONS.

1. *This Organizational Assessment sees no need for any reorganization of Breezy Point’s City government.*

The fundamental fact which compels this conclusion regarding Breezy Point’s organization is that the City today delivers almost all of its services with a high level of quality and customer satisfaction.

The only exception to this, as articulated by several interviewees, was customer service in connection with Planning & Zoning: this should be cured with the advent of the new, full-time Planning & Zoning Administrator.

Put another way, Breezy Point’s organization today performs generally at a high level with respect to the fundamental elements of governmental administration known as “POSDCORB” for:

- Planning
- Organizing
- Staffing
- Directing

- Co-ordinating
- Reporting
- Budgeting

These constitute the criteria by which the efficiency and effectiveness of governmental and other organizations have been evaluated for more than 80 years.

Had the question of reorganization been asked a few years ago before the advent of the positions of (1) Assistant City Administrator and (2) Planning & Zoning Administrator, the answer here might have been different.

However, with the City of Breezy Point recently having acted affirmatively to enhance critical staff capacity, no specific changes in organization need to be made at this time.

2. *Breezy Point may wish to review its organization in approximately five years when the nature and impact of the next period of growth is more clear.*

Five years is a sensible interval for taking another look at the City's organization.

The next course of growth will have been clarified by that time, enabling decisions about organization to be informed by new and then-current facts.

## Section Fifteen Summary of Facilities

Section Fifteen: Summary of Facilities Summary of Key Findings and Recommendations
1. The Breezy Point City Hall is disorganized and dysfunctional, adversely affecting the functioning of City government, the delivery of municipal services, and the efficiency and effectiveness of the work of the staff.
2. The Public Works garage is now beyond its functional limit and should be replaced as a Priority I project.
3. The Police Department’s building is meeting its needs and the Chief of Police expects that it has another 10 years of useful lifetime.
4. The sewer plant is not expected to require major expansion or replacement for approximately 10 years.
5. The pace and nature of growth in Breezy Point will likely affect the nature of facilities which the City may need and at what point in time.

### A. OVERVIEW.

This Section Fifteen brings together in one place a summary of issues related to Breezy Point’s municipal facilities.

### B. FINDINGS AND RECOMMENDATIONS.

- 1. The Breezy Point City Hall is disorganized and dysfunctional, adversely affecting the functioning of City government, the delivery of municipal services, and the efficiency and effectiveness of the work of the staff.*

The City is well along in addressing this situation and there is no need for this *Organizational Assessment* to retread this ground.

- 2. The Public Works garage is now beyond its functional limit and should be replaced as a Priority I project.*

Section Six, Public Works, addressed the need for a new Public Works garage in greater detail.

- 3. The Police Department’s building is meeting its needs and the Chief of Police expects that it has another 10 years of useful lifetime.*

This situation was addressed previously in Section Seven, Police, and discussed directly with the Chief of Police.

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4. *The sewer plant is not expected to require major expansion or replacement for approximately 10 years.*

This was the response of the Public Works Supervisor when asked directly.

5. *The pace and nature of growth in Breezy Point will likely affect the nature of facilities which the City may need and at what point in time.*

The City will need to continue to monitor growth and its impact on Breezy Point's facilities.

## Section Sixteen

### Financial Considerations

Section Sixteen: Financial Considerations Summary of Key Findings and Recommendations
1. This <i>Organizational Assessment</i> recommends two, major investments to enhance Breezy Point’s services and staffing: (1) procurement and implementation of a new ERP system; and (2) replacement of the Public Works garage.
2. Responsible cost estimates for each of these two, major investments cannot be made at this time since the specific scope of each of these projects cannot be known.
3. Several smaller investments are recommended ranging from additional Summer staffing and the entry shelter for the Police Department to small equipment for Public Works.
4. The City Administrator should be responsible for integrating the one-time and annual-operating costs of these investments into the City’s CIP and operating and capital budgets in order to assure that they are fiscally prudent and sustainable.
5. City Council should adopt a percentage-based policy for annual funding of road work.

#### A. OVERVIEW.

This Section Sixteen, Financial Considerations, concerns itself with the one-time and longer-term financial implications of the recommendations of this *Organizational Assessment* as this affects Breezy Point’s operating and capital budgets.

#### B. FINDINGS AND RECOMMENDATIONS.

1. *This Organizational Assessment recommends two, major investments to enhance Breezy Point’s services and staffing: (1) procurement and implementation of a new ERP system; and (2) replacement of the Public Works garage.*

These are the two recommendations of this *Organizational Assessment* which are of significant fiscal impact for Breezy Point. Likewise, they are two of the most important recommendations with respect to impact on operations and services.

2. *Responsible cost estimates for each of these two, major investments cannot be made at this time since the specific scope of each of these projects cannot be known.*

Breezy Point will need to do a lot more work related to financial considerations if it should wish to pursue either or both of these projects. There are some very basic questions about each project which cannot be known at this time. For example, with respect to the ERP project:

- What is the scope of applications which the City wishes to include in the RFP?
- What does Breezy Point wish to do about conversion?
- How much training for how many users needs to be done for each application?



Likewise, for the Public Works garage:

- How big should it be?
- Where should it be located?
- What special capabilities should it have?

These questions need to be answered at the front end of each project, respectively.

**3. *Several smaller investments are recommended, ranging from additional Summer staffing and the entry shelter for the Police Department to small equipment for Public Works.***

The City will need to determine what the urgency of each of these smaller items is (e.g., Police Summer staffing) and when each may be able to be funded.

**4. *The City Administrator should be responsible for integrating the one-time and annual-operating costs of these investments into the City's CIP and operating and capital budgets in order to assure that they are fiscally prudent and sustainable.***

The City Administrator is in a unique position in terms of evaluating the best way to budget for these projects.

Part of this process may involve obtaining the advice of the City's financial advisor or its auditor.

The City Administrator should bring these questions of financing to the City Council in a workshop meeting early in the process.

**5. *City Council should adopt a percentage-based policy for annual funding of road work.***

Section Six, Public Works, disused this recommendation previously.

This kind of regular, predictable funding for municipal infrastructure is sound practice.

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## Section Seventeen

### Implementing the Organizational Assessment

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Section Seventeen: Implementing the Organizational Assessment Summary of Key Findings and Recommendations
1. This <b>Organizational Assessment</b> offers 51 recommendations by priority for phased implementation.
2. Implementing certain recommendations is a matter of policy and management with no cost while others may have substantial fiscal impact.
3. The City Council should proceed very deliberately in evaluating these recommendations, soliciting the advice of the staff and others as it may find appropriate.
4. The City Administrator, by virtue of their position, serves as the <i>de facto</i> project manager for implementation of this <b>Organizational Assessment</b> 's recommendations.
5. Breezy Point will need to have a fiscal strategy for implementation which accommodates its budgetary calendar and statutory or other fiscal constraints. This likely will have a fundamental impact in shaping decision-making regarding the implementation of this <b>Organizational Assessment</b> 's recommendations.
6. The City should identify "low hanging fruit"--those recommendations which can be implemented with relatively small effort or cost and still provide benefit to Breezy Point.
7. The City will need to identify members of the staff who have responsibility for the implementation of each recommendation with which the City Council decides to proceed.
8. The City Administrator should be responsible for providing an update to the City Council at each of its monthly meetings regarding the status of each recommendation.
9. Capacity, defined here as the human resources which can be applied to implementation of this <b>Organizational Assessment</b> 's recommendations, is a key issue mainly because of: (1) the relatively large number of recommendations, their import and complexity and (2) the small size of the City's staff.

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## A. OVERVIEW.

This *Organizational Assessment* offers 51 recommendations by priority for phased implementation.

*Every one of these recommendations focuses on a single goal: optimizing the efficiency and effectiveness of the City of Breezy Point.*

Addressing these recommendations will present an enormous challenge to the City and the staff.

By its nature, this *Organizational Assessment* presents recommendations which may involve different levels of consensus or controversy. The City Council and the City's staff will need to be open and deliberate in their consideration of these recommendations.

## B. FINDINGS AND RECOMMENDATIONS.

### *1. This Organizational Assessment offers 51 recommendations by priority for implementation.*

These recommendations appear in Table 8 on the next two pages. They affect almost every area of the City's policy-making, management and operations as this regards Breezy Point's services, staffing and organization.

Their suggested priority, as discussed previously in Section One, Project Background, is based primarily on two factors, (1) risk and (2) impact.

- **Risk** addresses possible adverse consequences to the City from a current or foreseeable situation, or the City's not taking a given action.
- **Impact** looks at the breadth or depth of the consequences of an action on Breezy Point's residents, visitors, businesses or other parties. This has been stated over the years as the Utilitarian Principle, i.e., the greatest good to the greatest number of people.

Where Table 8 uses an "X" in the column headed Cost, this represents a direct cost which the City should expect. A blank represents no expected cost.

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**Table 8**  
**Summary of Recommendations by Priority**

Line	Section	Recommendation	Cost
1		<b>*** PRIORITY I ***</b>	
2	15.B.1	Resolve City Hall decision.	X
3	11.B.1	Procure and implement new ERP.	X
4	5.B.2	Revise chart of accounts.	X
5	5.B.3	Implement purchase-order-based encumbrance accounting.	
6	7.B.2	Police Summer staffing.	X
7	6.B.3	New Public Works garage.	X
8	7.B.3	Police station safe entryway.	X
9	6.B.4	% \$ commitment for roadway funding.	X
10	5.B.5	Implement Capital Improvement Program (“CIP”).	
11	10.B.3	Revise Personnel Policy.	
12	4.B.10	Robust City Council minutes.	
13	4.B.3	Implement weekly staff meetings around Council meetings.	
14	4.B.6	City Administrator retain all direct reports.	
15	4.B.7	Continue use of League of Minnesota Cities (“LMC”) resources.	
16	4.B.8	City Administrator reach out to business community.	
17	5.B.6	Raise \$\$\$ limits: Council approval of budgeted purchases.	
18	6.B.8	Public Works small equipment.	X
19	7.B.8	Police two monitors.	X
20	8.B.2	Evaluate useful lifetime of 2003 Peterbilt fire engine.	X
21	8.B.3	Active recruitment of additional call firefighters.	X
22	8.B.5	Fire Chief office equipment.	X
23	9.B.5	Planning & Zoning Administrator monthly report to Council.	
24	10.B.4	Staff participation in professional associations.	X
25	11.B.2	Consultant for ERP procurement and implementation.	X
26	11.B.3	Assistant City Administrator as IT lead.	

Line	Section	Recommendation	Cost
27	11.B.4	Review Panel continues as IT user-group.	
28	11.B.5	Continue services of On Systems.	X
29	11.B.7	Evaluate Microsoft 365 Government.	X
30	11.B.9	Provide third-party software to employees and agencies.	X
31	11.B.10	Determine strategy for Citizen Relationship Management (“CRM”).	X
32	11.B.11	All forms on City’s web site in fillable pdf.	
33	11.B.12	Color laser printers for City Administrator and Asst. City Admin.	X
34	14.B.1	No need for any reorganization.	
35	14.B.2	Review organization in 5 years.	X
36	17.B.3	City Council evaluate recommendations with staff.	
37	17.B.4, 8	City Administrator as project manager: monthly report to Council.	
38	17.B.5	Fiscal strategy for implementation: State law, budget calendar.	
39	17.B.6	Identify low hanging fruit.	X
40	17.B.7	Staff members to lead individual implementations.	
41	<b>*** PRIORITY II ***</b>		
42	4.B.9	Publish City annual report.	X
43	5.B.4	Improve filing and organization of financial records.	X
44	6.B.6	Public Works specialized software.	X
45	6.B.10	Sewer system interim improvements.	X
46	9.B.3	Review State and County property information.	X
47	9.B.4	Review IT for Planning & Zoning.	X
48	11.B.6	Evaluate third-party software products.	X
49	11.B.8	Evaluate end-user skills with Microsoft 365.	X
50	12.B.2	Evaluate need for additional Police or Public Works staff.	X
51	12.B.3	Consider adding part-time employees.	X
52	12.B.4	Consider contracting.	X
53	12.B.5	Consider interlocal cooperation.	X

- 2. Implementing certain recommendations is a matter of policy and management with no cost while others may have substantial fiscal impact.*

Table 8 just identified which recommendations of this *Organizational Assessment* have a direct cost.

For example, of the total of 39 Priority I recommendations presented, 21 have a direct cost.

Of the remaining 18, some may involve a cost, depending on decisions which the City Council may make.

An example of a recommendation with no cost is the implementation of the CIP. This can be done by the staff with no direct cost.

- 3. The City Council should proceed very deliberately in evaluating these recommendations, soliciting the advice of the staff and others as it may find appropriate.*

At least a few months likely will be required for the City Council to work through these recommendations.

Having said that, there may be some recommendations here, such as those regarding (1) staffing for Police in Summer or (2) the percentage-funding policy for road work which the City Council may choose or need to address immediately.

Participation is key here. The staff at every level has a critical role to play in applying their knowledge and experience to these discussions. It will be the City Administrator's job, working with the City Council, to structure a means for the staff's participation in advising the City Council.

- 4. The City Administrator, by virtue of their position, serves as the de facto project manager for implementation of this Organizational Assessment's recommendations.*

The City Administrator holds day-to-day responsibility for seeing that continuous progress is made in implementing the priorities for implementation which the City Council may set.

- 5. Breezy Point will need to have a fiscal strategy for implementation which accommodates its budgetary calendar and statutory or other fiscal constraints. This likely will have a fundamental impact in shaping decision-making regarding the implementation of this Organizational Assessment's recommendations.*

Breezy Point's budgetary calendar likely will have a fundamental impact in shaping decisions regarding the implementation of this *Organizational Assessment's* recommendations.

As one example, the fact that the City's fiscal year begins January 1 may complicate what the City Council is able to do, when and how.

Likewise, Minnesota State law sets limits on municipal indebtedness and debt service.

- 6. The City should identify “low hanging fruit”--those recommendations which can be implemented with relatively small effort or cost and still provide benefit to Breezy Point.***

As one example, this *Organizational Assessment* recommends that the City address small equipment suggested for Public Works. Also, staff meetings can begin to be held immediately.

The Review Panel should review the *Organizational Assessment’s* recommendations and identify which may be included in this category.

- 7. The City will need to identify members of the staff who have responsibility for the implementation of each recommendation with which the City Council decides to proceed.***

While the City Administrator coordinates these efforts and may keep direct responsibility for certain recommendations, delegation to different members of the staff will be critical to seeing reasonable progress in the implementation.

The City Administrator should inform the City Council of these assignments and have the other members of the staff who have these responsibilities report with him to the City Council periodically.

- 8. The City Administrator should be responsible for providing an update to the City Council at each of its monthly meetings regarding the status of each recommendation.***

The City Administrator should have this report on the agenda for every meeting of the City Council, beginning in the month after this *Organizational Assessment* has been completed.

The decisions which the City Council has to make regarding the implementation of this *Organizational Assessment’s* recommendations have potentially great significance to the City’s services and finances: keeping the City Council informed on this regular basis is critical to the orderly consideration and implementation of these recommendations.

- 9. Capacity, defined here as the human resources which can be applied to implementation of this Organizational Assessment’s recommendations, is a key issue.***

This is the case mainly because of: (1) the relatively large number of recommendations, their import and complexity; and (2) the small size of the City’s staff.

The City Council and City Administrator will need to take a very measured approach to each of the decisions they may make regarding implementation of these recommendations.

Most critical to avoid is having ambitions which outstrip the City’s ability to succeed.

Consideration of capacity should be an ongoing concern of the City Council and City Administrator as the implementation proceeds.

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## Section Eighteen

### Conclusion

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This *Organizational Assessment* has taken a detailed, comprehensive, independent view of the issues which the City of Breezy Point has presented.

The findings and recommendations which this *Organizational Assessment* offers are based on data, fact and experience.

As well, the interest and effort extended by the City Council, the City's staff and contractors have been critical to the development of the *Organizational Assessment*.

In every instance, this *Organizational Assessment* offers findings and recommendation which it believes respond best to the City's needs.

The City Council and the staff of the City now have the challenge of addressing these recommendations in a way which both (1) enhances the City government and its delivery of services and (2) establishes the foundation for success in this effort.



**Appendix A**  
**Interviewees**

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## Interviewees

### 1. City Council

Angel Zierden, Mayor  
Rebecca Ball, Council Member  
Steve Jensen, Council Member  
Michael Moroni, Council Member  
Brad Scott, Council Member

### 2. Administration

David Chanski, City Administrator  
Daniel Eick, Assistant City Administrator  
Deb Runksmeier, Deputy Clerk/Office Manager

### 3. Finance

Janette Rust, Finance Specialist/Sewer Billing

### 4. Police

Brain Sandell, Chief of Police  
Josef Garcia, Police Sergeant  
Jay Lorch, Police Officer  
Kiel Lorch, Police Officer  
Nicholas Salvevold, Police Officer  
Dan Sathre, Police Officer  
Caryn Hollingsworth, Police Administrative Assistant

### 5. Public Works

Joe Zierden, Public Works Supervisor  
Neil Carlson, Assistant Public Works Supervisor  
Jory Carlson, Public Works Worker  
Bob Pratt, Public Works Worker  
Bill Schultz, Public Work Worker

### 6. Planning & Zoning

Jerry Bohnsack, Consultant Planner

### 7. Building Official

Scott Sadusky

### 8. Pequot Lakes Fire District

Mike Schwankl, Fire Chief

### 9. On Systems

Jon Melberg, President

**10. Widseth Smith Nolting & Assoc., Inc.**

Tim Houle, P.E., Vice President  
Mike Angland, AIA, Vice President

**11. Banyon Data Systems**

John Garner, Programmer

**12 CliftonLarsonAllen**

Mary Reedy, CPA, Principal