

What if ... You Want to Develop Middle Management Positions

A White Paper For Conservation Districts

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Facilitator Notes:

This outline and attached case studies represent the thoughts of three district managers with assistant managers, two assistant managers and a dedicated DEP Field Rep on a topic they all have had experience with or have observed closely. The record here is to set the stage for “What if... You Wanted to Develop a Middle Management Position”.

The format is meant to be wide in nature and then focus on steps that will help you go through the process to meet your specific needs. There are many different situations that face a variety of districts and this is an attempt to outline some of the implications of taking on the task of using middle management to address your needs.

Disclaimer:

The views expressed here are the results of six people with experience in facilitation and operating with Conservation District Middle Management positions. They are by no means the final word on the subject. We have made efforts to be as thorough as possible but make no claim to the completeness of this checklist nor do we take any responsibility, no matter what you think we may think, that your experience will be the same or as successful as a result of using this information. We offer this paper as a starting point for your explorations and hopefully it will help in your consideration and attempt to “Develop A Middle Management Position”.

Overview—The WHY

As districts grow in numbers of employees and programs, managers have much greater workloads and the need for help becomes more acute. Perhaps one of the following scenarios explains your district’s situation:

- The district is growing; the manager has program responsibilities and needs help in administration and oversight.
- The district has grown considerably and has multiple employees in several program areas. Program oversight, consistency, performance evaluations and training are needed.
- The manager is not able to keep up with his assigned duties in a timely manner.
- The district is looking for ways to provide employees with opportunities for professional growth and advancement within the district or opportunities to increase salaries for valued employees.
- The manager desires to involve key employee(s) in management decisions to build management continuity,
- There is a need to “compliment” the manager’s skills – not all managers have all the managerial skills (financial, personnel, program management, etc.)
- The Board sees that the manager is overworked and “burning out”.

- The manager’s role is changing to spending more time away building partnerships, marketing the district, and fund raising and needs a management presence in the office.
- The manager is on vacation or at a conference out of town and no one is in charge to make necessary decisions.
- With larger staffs, chain of command and communications become a more critical need.
- District Board or manager sees the manager’s role shifting from a “manager” to a “leader”, focusing more on “big themes” to grow and strengthen the district thus creating the need for someone to manage the day to day operations.
- A Leadership Development Team Visit recommended your district consider an assistant manager.

While you are determining what your real needs are, also consider what **form** of assistance your manager needs. What’s not getting done? Will this position act as a manager in training or an assistant to the manager? These are some of the questions that your district needs to consider as you contemplate providing help to your manager.

Middle management positions can take on many different forms or titles: assistant manager (either full-time or in addition to program responsibilities), front line supervisor(s) over major program area(s) (with some program responsibilities), an administrative team for manager to consult with, program managers, administrative assistant, or an assistant to the manager. Often in smaller to mid-size districts these positions still continue to have some program responsibilities while helping to lighten the burden on the manager. In larger districts, full-time positions may be needed.

Is the decision to develop a Middle Management position part of the district’s Strategic Plan? If not, does the plan need to be amended? Ideally, such a move should have been part of the plan.

The first step is deciding what your needs are. The following descriptions or titles will give you an idea of what kind of positions and responsibilities some districts are doing. The specific titles may vary and responsibilities can be mixed and matched to meet your needs.

What are some of Options Districts are Using?

Assistant Manager: Usually a professional and an exempt employee. Carries out duties of the manager in his/her absence. May be assigned several other administrative duties in addition to program responsibilities. May attend meetings in place of manager. Often will assist with employee evaluations and hiring interviews and provides counsel to manager. In larger or very large districts this position may be full-time. In smaller districts, the assistant usually has program responsibilities as well. Assistant will often be considered first in line to succeed if manager leaves.

Assistant to the Manager: Usually a professional and an exempt employee. Similar duties as listed above for an Assistant Manager, but are not necessarily considered next in line to replace the manager. In larger districts, this position may be full-time.

Administrative Assistant: Usually a clerical, non-exempt employee. Primary duties typically include bookkeeping, payroll, administration of benefits, preparations of Board mailings and minutes. This employee can relieve manager of many duties but is usually **not** considered a management position or makes management decisions unless the individual supervises other clerical employees. This position is found in districts of all sizes.

Frontline Supervisor(s): Usually a professional, exempt employee. These employees are typically senior technicians who oversee **several** other technicians with similar type jobs (i.e. E&S Supervisor, Ag Supervisor, etc.). They will complete quarterly reports, schedule days off to assure adequate coverage, provide program training to new employees, may assist with employee evaluations, help interview prospective employees, attend program specific meetings and other assigned duties. These positions are usually in addition to program responsibilities but in larger districts may be full-time or have reduced program responsibilities. In larger or mid-size districts, these positions can be used in place of an Assistant Manager. It's not unusual for larger or very large districts to have more than one frontline supervisor.

Program Manager: Usually a professional, may be exempt or non-exempt depending on program or supervision responsibilities. Program Managers are in charge of a specific program (i.e. Nutrient Management, Chesapeake Bay, Environmental Education, Watershed Program, E&S, etc.). They may only have supervision authority if there is more than one employee in that program and would provide training to new program employees and assist with employee evaluations within the program. They usually prepare the quarterly reports for that program and attend program specific meetings. They could assist in interviewing new employees for that program. This person typically has program responsibilities. This position can be used in districts of any size.

Administrative Team: This typically consists of staff that has supervisory or some level of management responsibility that meet regularly to provide counsel to the manager. Manager may delegate some of his/her duties to members of this team. This team may provide a key means of communications from the manager to the staff, can be used to help formulate policy recommendations, and provides an opportunity for good interaction between district programs and activities. An administrative team may be most helpful in large or very large districts.

Steps to Take, Things to Consider, Questions to Ask, Challenges

The following checklist may help your district move through the planning and implementation process of moving to middle management position(s).

- Discuss the concept with the Board Personnel Committee and/or full Board to get their thoughts and approval to investigate and develop a proposal.
- If necessary, approach the appropriate County official(s) to get their feel for the idea and what information they would like to see or require to be in a proposal.
- Does the manager have the ability and desire to delegate authority and responsibility?
- Do current staff members have the skills, personality and aptitude for additional leadership and administrative responsibilities?
- Determine your district's needs and type of position(s) you hope to develop. A Strategic Plan would give guidance to such action.
- Develop a proposed organizational chart and appropriate job description(s). You don't have to “reinvent the wheel”, ask other districts that have done this. Define limits of authority in job description(s). Get Board support for what managerial authority can be delegated.
- Consider job classifications (exempt or non-exempt) if this is a concern to the district or the County
- Determine appropriate compensation for the new positions or responsibilities. If considering an Assistant manager, is it important that person's salary be second only to the manager's?
- Develop a budget for the position considering additional space and equipment if additional staff will be necessary.
- Consider possible funding sources to fund new position(s) and/or additional pay increases if using existing staff. (Attached Case Studies suggest how some program responsibilities are combined and other sources are used).
- Determine if you are taking full advantage of “cost allocations” to account for all overhead and administrative costs and how to charge to appropriate programs to maximize reimbursements from contracts, delegations, and grants. If not – it could be to your advantage to learn how before going any further.
- If moving an existing employee into a middle management position, and they still have program responsibilities, spell out who fills the void. What activities take priority, management or program? Don't overload the middle manager.
- Consider the necessary process to get new positions or position upgrades if under County governance.
- Develop a complete draft proposal to take to your Board Personnel Committee, and, with their approval, to the full Board.
- If necessary, take to the proposal to the County Commissioners with District Board approval
- If approved, when selecting person to fill the position(s), avoid creating “turf battle” situations within the district. Consider an open, honest meeting with existing staff to discuss what you are trying to accomplish so they don't feel threatened or “passed over”.
- Prior to interviews, evaluate strengths and needs of the existing manager and try to compliment any management needs with your selection.

- After selection, identify and provide for management training opportunities for person(s) moved into new position(s).
- Determine a time frame and a process to evaluate the effectiveness of the new position – a probationary period- to see if the Board wants to keep the new management arrangement or revert to something else.

Conclusions

Middle management positions may be helpful for districts of any size where district size, complexity and/or program growth puts undo pressure on manager or staff to meet the growing demands on their time. Middle management positions may also provide needed professional growth opportunities for staff. When considering such a move, first decide what kind of position or team structure is needed for your district. Tailor the position to meet your specific needs. Don't be afraid to ask for help from those who have gone through the process. One of the greatest strengths of conservation districts is their willingness to help each other.

Adding middle management should ideally be part of the district's Strategic Plan to validate actions to be taken. Specific needs should be discussed and outlined with appropriate committees and boards. A complete proposal needs to be developed in consultation with the Board and (if necessary) the County.

The following three attached Case Studies are presented to give you insight into how districts with different needs and sizes approached this issue, met their original needs and may have further evolved as the district continued to grow. They illustrate different types of management and technical program responsibilities to ones that have full management responsibilities and can function as the manager in his/her absence. These District Authorities who authored these Case Studies are available for counsel and welcome you to visit their district.

****Please note that organizational charts and position descriptions are available from each of the districts that have included case studies***

Development of Middle Management Position - Case Study – Lancaster County Gerald Heistand, Assistant to the Administrator

OVERVIEW:

The Lancaster County Conservation District operates independently from county government. Lancaster’s County Commissioners provide about 14% of the district operations revenue, and there is a Commissioner on the Budget and Finance Committee; however, district employees are not considered county employees and do not receive county benefits. The District has its own Personnel Manual, can hire, fire, set salaries, and determine employee benefits independent of county government policy. The district has gone from a five member staff (Administrator, E&S technician, Ag technician, and two secretaries) to a staff of twenty-five full time employees in twenty years time (see attached organizational chart).

DEVELOPMENTAL PROCESS OF A MIDDLE MANAGEMENT POSITION:

As an Ag Technician in 1985 when the Chesapeake Bay Program started, I took care of preparing watershed assessment reports and did most of the agricultural progress reporting. This relieved the District Administrator of some agricultural related duties, but by no means qualified the position as middle management. In the late 80s I was given the title of Assistant Administrator, Chesapeake Bay Program. This meant that when the District Administrator was out, I was considered in charge; however, I continued to spend most of my time on ag related programs. In 1993 the Administrator retired after serving the district for ten years.

The new District Administrator immediately set up a department head over the Erosion & Sedimentation program and one over the Chesapeake Bay Program. A technician was named as an E&S program manager and I was given the title of Assistant Administrator & Chesapeake Bay Technician. With this setup the day to day operations of those two departments did not need daily oversight by the District Administrator. This marked the beginning of establishing middle management at Lancaster District. As time progressed new programs were added (Nutrient Management, Biosolids, ACT Program, Educational Coordinator, Watershed Specialist, and Ombudsman). Each of these programs had a program manager who reported to the District Administrator. At this point the Administrator was still making most of the management decisions and doing most of the detailed day to day financial work. It soon became apparent that he could not continue doing all of the detailed work. In 2001 the Chesapeake Bay Program Manager responsibilities were given to another employee, and I started to oversee the daily financial responsibilities, and was given the title, Assistant to the Administrator. Since this was a new position, and there was no dedicated funding, it put an additional burden on the budget. Part of the solution was to charge each of the programs a portion of my salary as Profession In-House Support. In addition to financial responsibilities (approving expenditures, overseeing cash flow, budgeting, etc.), I assist with human resource concerns and various other administrative tasks (e.g. personnel manual updates, change the pension plan to 457k tax deferred, verify that quarterly reports are completed, deal with equipment maintenance and inventory, and work at cost containment, etc.). This relieved the District Administrator of many in-office time consuming duties. The full extent of the responsibilities for the current Assistant to the Administrator position can be seen in the job description that follows this study. A key point to note here is that the Assistant to the Administrator is in charge anytime the District Administrator is absent.

An aspect of middle management in the Lancaster District that should not be overlooked is that of the program managers. In January of 2004 when a new District Administrator was named, there were seven program managers. A concern surfaced over whether there was an adequate flow of information from each of the program managers to the District Administrator. In order to deal with this concern, middle management was trimmed back to the Assistant to the Administrator (described above) and two program managers (see organizational). Having two managers and an

assistant that report to the new administrator work better than trying to work with eight different individuals. The two managers verify that time cards are completed, assure that there is adequate coverage when employees take vacation, assist with employee evaluations, suggest spot awards, assure that adequate training is provided for new employees, and prepare quarterly reports. Using Program Managers also allow the District Administer to spend time on other activities.

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Development of Middle Management Position Case Study – Armstrong County

Dave Rupert, District Manager

OVERVIEW:

The Armstrong Conservation District is a medium sized District that employs six full time permanent staff, two full time Americorps members, shares a full time staff person (watershed specialist) with Indiana County, and employs one or more summer interns and volunteers to help the organization meet its goals and annual objectives. From 1982 until 2001, the entire staff was supervised by the District Manager. No provision was made for staff supervision in the absence of the Manager, except by the District Chairman.

DEVELOPMENTAL PROCESS OF A MIDDLE MANAGEMENT POSITION:

In 2001, the Manager was injured and was unable to work for an extended period of time. The prognosis was that the Manager would be off for approximately three months. The District Board decided that the organization could not function effectively while the Manager was not present for this period of time and the fact that there was no established chain of command.

Upon his return, the District Board had the Manager explore three options:

1. Creation of a new position of Assistant District Manager with funding 100% from the County Commissioners
2. The creation of a new position of Assistant Manager combined with duties in an existing area of responsibility such as the Erosion control, nutrient management, dirt and gravel road or other District Program. Funding would be derived from both County and State resources.
3. The addition of the Assistant District Manager duties to an existing staff position with a slight salary increase to compensate for the additional responsibilities.

The District Board chose the third option by adding the Assistant Manager’s responsibilities to an existing position rather than to fund an entirely new position. The next step in the process was to allow the existing staff to apply for the Assistant Managers position and to conduct interviews with interested staff. The Board decided to keep the responsibilities of the Assistant Manager simple. The Assistant Manager would follow the Manager’s job description and act in the absence of the Manager in the following situations:

1. When the Manager is away from the office (more than one day for training, conferences, and other District activities) or for sick, vacation, personal or other District related or unrelated business.
2. If or when the District Board deemed it to be in the best interest of the District.
3. When circumstances dictate that the District has representation at two different locations at the same time by the Chief Administrative Officer of the District.

While the Manager is present, the Assistant Manager serves only in his capacity as the Erosion and Sediment Control Technician. When performing his Assistant Manager duties, his program responsibilities for the Erosion Control Program continue. In the absence of the Manager, the Assistant Manager is expected to make decisions necessary to the effective operation of the District. In short, the Assistant Manager has the job description of the Manager plus his own job description while the Manager is not present. The District Chairman remains available for consultation, but the final decisions are left to the Assistant Manager. Decisions made by the Assistant Manager are final and may not be countermanded by the Manager upon his return. Staff is expected to follow the decisions of the Assistant Manager as they would follow those of the Manager.

For anticipated absences, such as attendance at conferences, training events, vacations, and other planned absences, the Manager and Assistant Manager confer prior to the absence about items needing attention during the Manager’s absence. The Manager remains available for emergency consultation by cell phone and email. The Manager has his own cellular phone and will accept District calls of an emergency nature while away from the office. The District owns a laptop

computer that the Manager takes with him while on District related business for checking emails. In the case of an unanticipated absence, such as an unexpected illness or other unforeseen crisis, the Assistant Manager may confer with the Manager (providing he is able to communicate) or the District Chairman for input and advice. Final decisions are vested with the Assistant Manager.

The current Manger has a very strong driver interpersonal style profile, while the current Assistant Manager has a very strong harmonizer interpersonal style profile. Staff tends to enjoy the change of pace that comes with the Manager being “away from the office”.

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Development of Management Positions - Case Study – Cambria County John Dryzal, Assistant Manager / Park Director

Overview

The Cambria County Conservation District has had a management position in addition to the District Manager since 1993. The District has ten full-time employees. But, with additional staffing such as AmeriCorps members, interns and county park staff, the number of personnel to supervise at any one time can be in excess of 25. Initially, an additional management position was created to primarily provide the manager with assistance in meeting the growing need of training and directing new staff as the district grew and to have someone able to serve in the capacity of the manager in his absence. However, the initial middle management structure has changed over the years and in 2004 the district created two additional middle management positions and formed an administrative team to operate more effectively.

Developmental Process of Management Positions

Assistant Manager / Resource Specialist (1993)

In 1993 the district had six employees. At the time, two employees were resigning and the district had obtained a grant creating a need for another position. Realizing that half of the district staff would be new and require extensive training and direction, the district created a new position with managerial duties to assist the manager with managing and training the new staff and associated fiscal responsibilities. The created position basically added the additional managerial duties to the Resource Specialist (first technician) and provided the ability to function as the manager in his absence. This position had both managerial and technical program duties.

Assistant Manager / Park Director (1997)

In 1997, the County Commissioners delegated operations of the county park to the conservation district. Operating a recreational park was something entirely new to the conservation district and the district had to consider how to best manage these additional responsibilities while meeting the existing workload. After extensive consideration, the district made the following changes.

The Assistant Manager Position was modified to handle the park operations. The position title changed from Assistant Manager / Resource Specialist to Assistant Manager / Park Director. With the additional managerial workload, the program technical duties being completed by the Assistant Manager / Resource Specialist were reassigned to the full-time Resource Specialist. The district also created a part-time Resource Specialist position to assist the full-time Resource Specialist with the program workload. The Assistant Manager / Park Director position now had primarily management responsibilities.

Resource Conservation Supervisors (2004)

With the explosion of conservation district programming in the late 1990's and early 2000's, the programmatic and managerial oversight required was beginning to overwhelm the district managers. It was becoming impossible to stay informed of what was happening with all the programs and projects. This resulted in an increased breakdown in communications between the managers and the technical staff.

In 2002, the district developed a Strategic Plan. During the plan development process, the district reviewed its organizational chart. Although it never is mentioned in the plan, the district realized that as programs were added, the district had been expanding horizontally and not pyramidal.

In November of 2003, the District presented a reorganization proposal to the county commissioners. The proposed reorganization created two additional management positions but without adding any additional staff. The positions created were basically program managers that

have both managerial and technical duties. These positions were very similar to the original Assistant Manager position but without the ability to function as the manager in his absence.

In February of 2004, the county commissioners approved the district reorganization. The attached organizational chart depicts our current structure with four management positions. These four positions are; District Manager, Assistant Manager / Park Director (can act as the District Manager in his absence), and two Resource Conservation Supervisors (program managers with supervisory duties).

Implementation Process of Additional Management Positions

Administrative Team

Along with the reorganization and adding new management positions, the district created an Administrative Team. The Administrative Team includes the management employees along with the other administrative/clerical staff. This administrative team has been the backbone in maintaining effective communication and operation within the district.

The team meets regularly, typically bi-weekly, and covers three areas; scheduling, deadlines and priorities and concerns and brainstorming. The regular meetings are the key to several critical needs. First, they keep the manager informed of what is happening without needing to be directly involved in the programs. They provide the opportunity for the manager to receive feed back on how decisions are affecting the staff. They are an avenue for the manager to provide guidance/assistance to the middle management personnel to help them through situations and develop their management skills. These meetings help avoid micromanaging and also serve to alleviate any concerns about the chain of command.

Summary

The Cambria County Conservation District has had a management position in addition to the District Manager for twelve years. Currently the district has four management positions at various levels of authority and has also formed an administrative team as part of the implementation of the middle management positions. The need for multiple management positions and changes in existing management positions have come about for numerous and varying reasons. During the development of the positions several factors were considered. Some of these factors include but are not limited to: “true” needs for the positions, abilities of existing staff, funding, effects on district programming and interoffice operations. Although it was a challenge to create and fund the positions, the benefits have been well worth the struggle.

This case study is a very brief summary of how our management positions have been created and does not fully explain the entire developmental process. There are many things to consider and many steps to take to develop effective management positions within your district.

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Addendum

Cambria County Conservation District Organizational Chart
Position Descriptions

Assistant Manager / Park Director
Resource Conservation Supervisor