

## Human Resources











Element	Summary Views	Detail Views
Scorecard	<ul style="list-style-type: none"> <li>• <a href="#">Landing Page</a></li> </ul>	
Outcome Measures		<ul style="list-style-type: none"> <li>• Percent of employees with tenure of 10 years or greater as measured by maintaining FT current rate of 40% and establish annual review.</li> <li>• Percent of first candidate acceptance as measured by how many offers accepted divided how many offers were made - Target 100%</li> <li>• Turnover rate as measured by maintaining an annual turnover rate of less than 10%</li> <li>• Experience Modifier Rate as measured by industry average of 1 annually.</li> </ul>
Initiatives	<ul style="list-style-type: none"> <li>• <a href="#">Department Initiatives</a></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">Implement and Rollout HR/Payroll Munis</a></li> <li>• <a href="#">Conduct North Carolina Health Insurance Pool (NCHIP) Implementation</a></li> <li>• <a href="#">Conversion to Electronic HR Records</a></li> <li>• <a href="#">Align the Performance Evaluation Process to Connect Morrisville</a></li> </ul>
Milestones		<ul style="list-style-type: none"> <li>• <a href="#">Rollout of Payroll System</a></li> <li>• <a href="#">Part-time Pay Plan</a></li> <li>• <a href="#">Data Analysis and Validation</a></li> <li>• <a href="#">Accrual Import into Munis</a></li> <li>• <a href="#">Import/conversion of personnel data records from legacy to Munis</a></li> <li>• <a href="#">System Training and Report Development</a></li> <li>• <a href="#">COBRA Conversion from Infinisource to BenefitSolver</a></li> <li>• <a href="#">Data Import</a></li> <li>• <a href="#">Meet with Vendor to Review Files</a></li> <li>• <a href="#">Received First Batch of Files and review</a></li> <li>• <a href="#">Receive Second Batch of files for review</a></li> <li>• <a href="#">Met with Consultant to review current evaluation form/process and recommended updates</a></li> <li>• <a href="#">Met with senior management to review consultant recommendations.</a></li> <li>• <a href="#">Incorporate Approved Connect Morrisville Consultant Recommendations for FY2020 Performance Evaluations</a></li> <li>• <a href="#">Created evaluations with approved revisions</a></li> </ul>



























**Department Purpose Statement**

To provide a leadership role in recruitment, retention and development of an exceptional workforce in service of the organization and community.

**Department Measures**

Objectives	Outcome Measures
 <b>Obj. 5.3: Require the highest professional standards</b> Morrisville	 <b>Percent of employees with tenure of 10 years or greater as measured by maintaining FT current rate of 40% and establish annual review.</b>
 <b>Obj. 5.4: Attract, develop and retain a diverse, high-performing workforce</b> Morrisville	
 <b>Obj. 5.4: Attract, develop and retain a diverse, high-performing workforce</b> Morrisville	 <b>Percent of first candidate acceptance as measured by how many offers accepted divided how many offers were made - Target 100%</b>
 <b>Obj. 5.4: Attract, develop and retain a diverse, high-performing workforce</b> Morrisville	 <b>Turnover rate as measured by maintaining an annual turnover rate of less than 10%</b>
 <b>Obj. 5.3: Require the highest professional standards</b> Morrisville	 <b>Experience Modifier Rate as measured by industry average of 1 annually.</b>
 <b>Obj. 5.4: Attract, develop and retain a diverse, high-performing workforce</b> Morrisville	

Department Initiatives

Objectives	Initiatives	Milestones
<p> <b>Obj. 5.6: Leverage the use of technology to maximize results</b> Morrisville</p>	<p> <b>Implement and Rollout HR/Payroll Munis</b></p>	<p> <b>Rollout of Payroll System</b></p>
		<p> <b>Part-time Pay Plan</b></p>
		<p> <b>Data Analysis and Validation</b></p>
		<p> <b>Accrual Import into Munis</b></p>
		<p> <b>Import/conversion of personnel data records from legacy to Munis</b></p>
<p> <b>Obj. 5.6: Leverage the use of technology to maximize results</b> Morrisville</p>	<p> <b>Conduct North Carolina Health Insurance Pool (NCHIP) Implementation</b></p>	<p> <b>System Training and Report Development</b></p>
		<p> <b>GOBRA Conversion from Infinisource to BenefitSolver</b></p>
		<p> <b>Data Import</b></p>
<p> <b>Obj. 5.6: Leverage the use of technology to maximize results</b> Morrisville</p>	<p> <b>Conversion to Electronic HR Records</b></p>	<p> <b>Meet with Vendor to Review Files</b></p>
		<p> <b>Received First Batch of Files and review</b></p>
		<p> <b>Receive Second Batch of files for review</b></p>
<p> <b>Obj. 5.3: Require the highest professional standards</b> Morrisville</p>	<p> <b>Align the Performance Evaluation Process to Connect Morrisville</b></p>	<p> <b>Met with Consultant to review current evaluation form/process and recommended updates</b></p>
<p> <b>Obj. 5.4: Attract, develop and retain a diverse, high-performing workforce</b> Morrisville</p>		<p> <b>Met with senior management to review consultant recommendations.</b></p>
		<p> <b>Incorporate Approved Connect Morrisville Consultant Recommendations for FY2020 Performance Evaluations</b></p>
		<p> <b>Created evaluations with approved revisions</b></p>

**Percent of employees with tenure of 10 years or greater as measured by maintaining FT current rate of 40% and establish annual review.**



Human Resources

**Description**

Full-time employees who have remained in Full-time employment with the Town for 10 years or more.

**Why It Matters**

This measures the retention of in-house knowledge and efficiencies within the workforce.

**Analysis** CY Q2-21

Tenure of 10 years or greater continues to trend lower as long term employees continue to retire and the reduction in Town new positions and hiring during the 2008 -2010 financial crisis impacting our Ten-plus year tenure.

**Collection and Calculation Method**

As measured by a query report based on FT employment of 10 or more years.

**Data Collection Lead**

**Data Collection Point(s) of Contact (if needed)**

Nate Mayer

**Objectives**

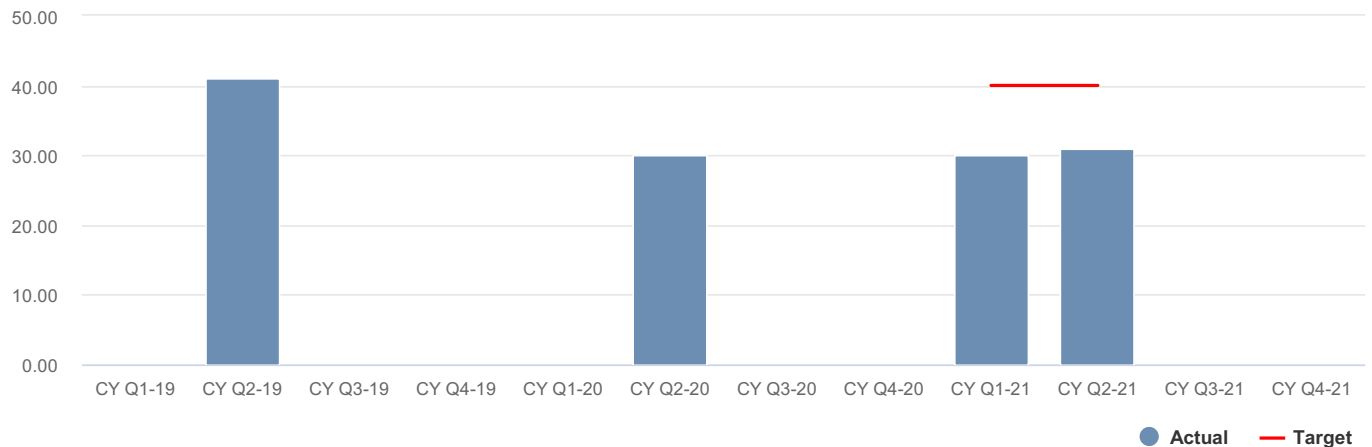
- ↑ **Obj. 5.3: Require the highest professional standards**  
Morrisville
- ▼ **Obj. 5.4: Attract, develop and retain a diverse, high-p.**  
Morrisville

**Initiatives**

**Owner**

NM Nate Mayer

**Percent of employees with tenure of 10 years or greater as measured by maintaining FT current rate of 40% and establish annual review.**



## Outcome Measure Data

Last Calculated a day ago

Period		Status	Actual	Target
CY Q1-19	—	Not Defined		
CY Q2-19	↑	On Target	41.00	40.00
CY Q3-19	—	Not Defined		
CY Q4-19	—	Not Defined		
CY Q1-20	—	Not Defined		
CY Q2-20	↓	Below Target	30.00	40.00
CY Q3-20	—	Not Defined		
CY Q4-20	—	Not Defined		
CY Q1-21	↓	Below Target	30.00	40.00
CY Q2-21	↓	Below Target	31.00	40.00
CY Q3-21	—	Not Defined		
CY Q4-21	—	Not Defined		

**Percent of first candidate acceptance as measured by how many offers accepted divided how many offers were made - Target 100%**  
 Human Resources

**Description**

Top selected candidates accepting offer for FT positions.

**Why It Matters**

The Town wants to be an employer of choice and top selected candidates acceptance of an offer is an indicator of this measure.

**Analysis** CY Q2-21

The job market is very competitive and job applicants frequently have multiple offers. These competitive hiring trends are expected to continue into next year.

**Collection and Calculation Method**

NEOGOV reporting on the fiscal year and calculation method is how many offers accepted divided how many offers were made

**Data Collection Lead**

**Data Collection Point(s) of Contact (if needed)**

Nate Mayer

**Objectives**

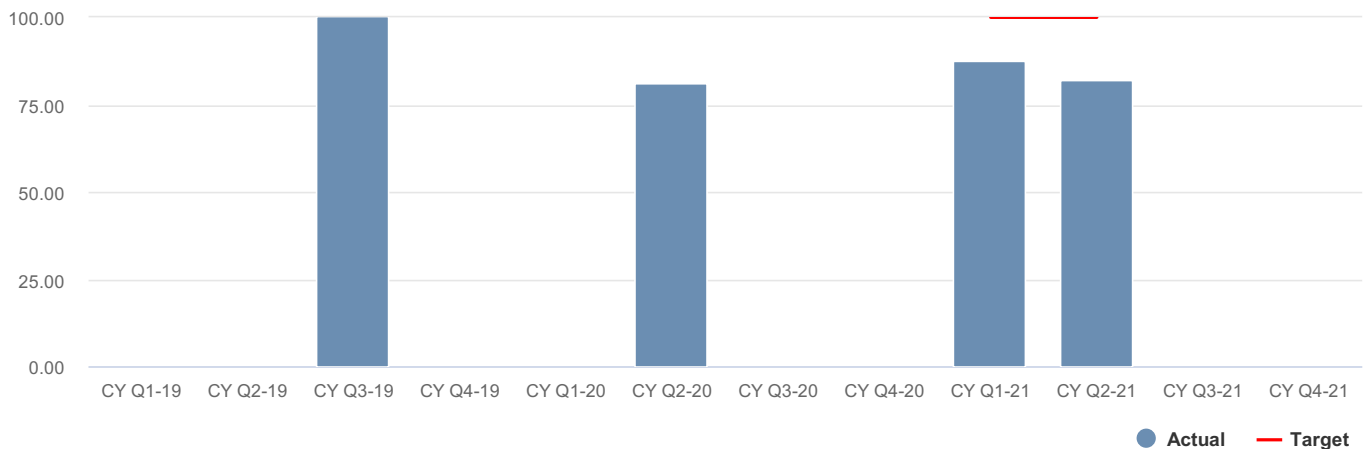
**Obj. 5.4: Attract, develop and retain a diverse, high-p. Morrisville**

**Initiatives**

**Owner**

**NM** Nate Mayer

**Percent of first candidate acceptance as measured by how many offers accepted divided how many offers were made**



Outcome Measure Data

Last Calculated a day ago

Period		Status	Actual	Target
CY Q1-19	—	Not Defined		
CY Q2-19	—	Not Defined		
CY Q3-19	↑	On Target	100.00	100.00
CY Q4-19	—	Not Defined		
CY Q1-20	—	Not Defined		
CY Q2-20	↓	Below Target	81.00	100.00
CY Q3-20	—	Not Defined		
CY Q4-20	↓	Below Target		
CY Q1-21	↓	Below Target	87.50	100.00
CY Q2-21	↓	Below Target	82.00	100.00
CY Q3-21	—	Not Defined		
CY Q4-21	—	Not Defined		

**Description**

FT employees voluntarily separating from FT Town employment.

**Why It Matters**

A high turnover rate indicates that we are not meeting our goal to retain staff.

**Analysis** CY Q2-21

The Town's turnover rate is currently trending lower as we continue to transition through COVID-19 effects. It is anticipated that turnover will increase as hiring continues in a competitive job market in all sectors and pent up turnover resumes.

**Collection and Calculation Method**


Cognos report and excel spreadsheet. Calculation is number of voluntary full time separations divided by the average number of employees in the fiscal year.

**Data Collection Lead**

**Data Collection Point(s) of Contact (if needed)**

Lauri Shedlick

**Objectives**

 **Obj. 5.4: Attract, develop and retain a diverse, high-p.**  
Morrisville

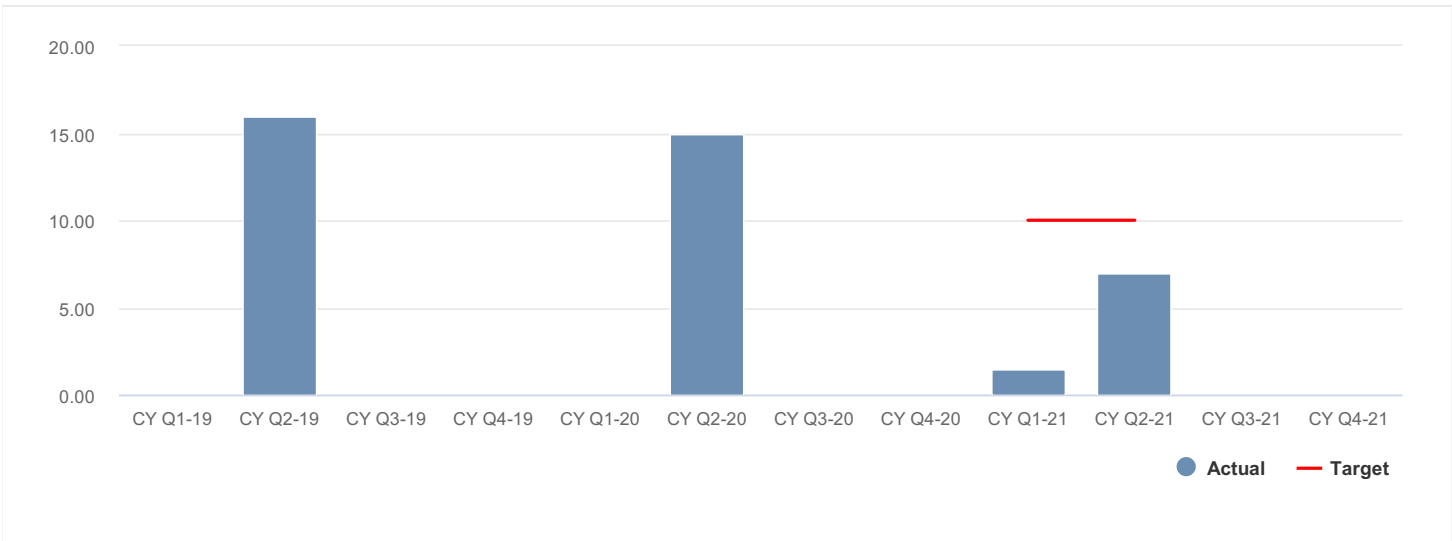
**Initiatives**

**Owner**

 Nate Mayer

**Turnover rate as measured by maintaining an annual turnover rate of less than 10%**





**Outcome Measure Data** Last Calculated a day ago

Period	Status	Actual	Target
CY Q1-19	Not Defined		
CY Q2-19	Below Target	16.00	10.00
CY Q3-19	Not Defined		
CY Q4-19	Not Defined		
CY Q1-20	Not Defined		
CY Q2-20	Below Target	15.00	10.00
CY Q3-20	Not Defined		
CY Q4-20	Not Defined		
CY Q1-21	On Target	1.50	10.00
CY Q2-21	Below Target	7.00	10.00
CY Q3-21	Not Defined		
CY Q4-21	Not Defined		



# Experience Modifier Rate as measured by industry average of 1 annually.

Human Resources

## Description

Rate is used by insurance companies to gauge both past cost of injuries and future chances of risk.

## Why It Matters

Captures workers compensation claims, frequency and severity based on prior three years, which reflects safety training and compliance across all Town departments. Factors for Understanding Results: Experience modification rate is a number used by insurance companies to gauge both past cost of injuries and future chances of risk. Experience modification rates are based on prior three years and consider frequency and severity of claims. Recent calculation changes by the NC Rate Bureau has caused an across the board EMR increase. TOM remains in the top 5% of our insurance broker's clients.

## Analysis CY Q2-21

The Town is consistently below the average Experience Modifier of 1, indicating our injuries and risk remains below the average for our industry.

## Collection and Calculation Method

Generated through the NC Rate Bureau.

## Data Collection Lead

## Data Collection Point(s) of Contact (if needed)

Chuck Queen

## Objectives

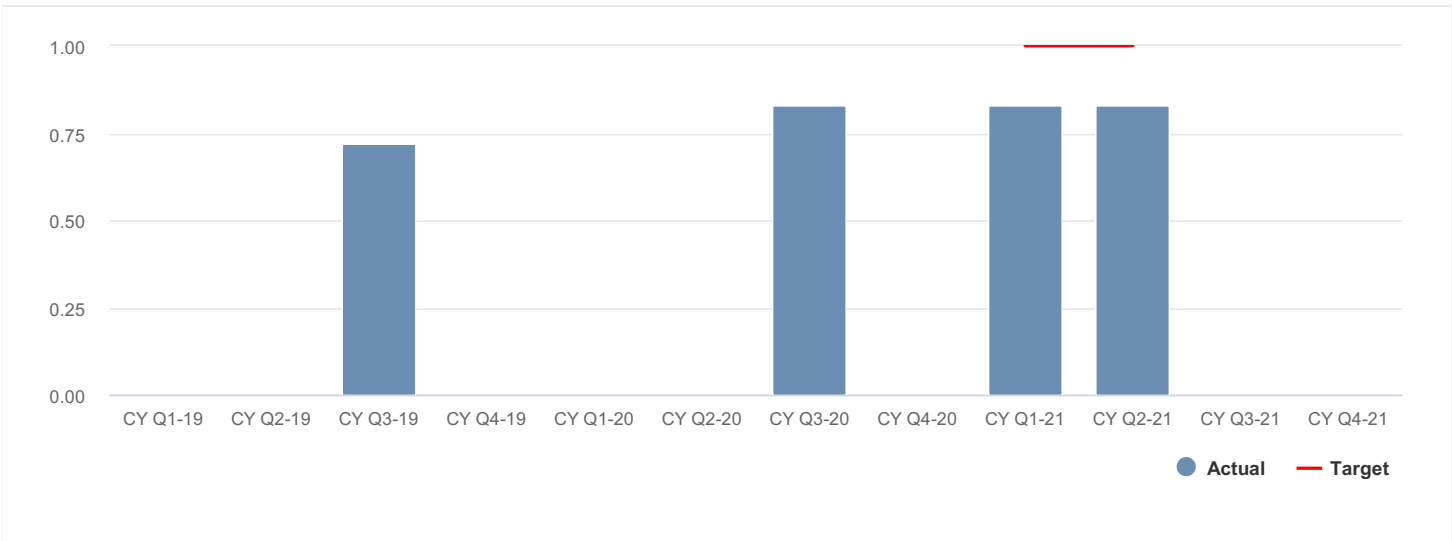
- Obj. 5.3: Require the highest professional standards**  
Morrisville
- Obj. 5.4: Attract, develop and retain a diverse, high-p.**  
Morrisville

## Initiatives

## Owner

Nate Mayer

## Experience Modifier Rate as measured by industry average of 1 annually.



**Outcome Measure Data** Last Calculated 2 days ago

Period	Status	Actual	Target
CY Q1-19	Not Defined		
CY Q2-19	Not Defined		
CY Q3-19	Below Target	0.72	1.00
CY Q4-19	Not Defined		
CY Q1-20	Not Defined		
CY Q2-20	Not Defined		
CY Q3-20	Below Target	0.83	1.00
CY Q4-20	On Target		
CY Q1-21	On Target	0.83	1.00
CY Q2-21	On Target	0.83	1.00
CY Q3-21	Not Defined		
CY Q4-21	Not Defined		

# Department Initiatives

Human Resources

























 Home

 Scorecard

 Outcome Measures

 Initiatives

 Milestones

Objectives	Initiatives	Milestones
<p> <b>Obj. 5.6: Leverage the use of technology to maximize results</b> Morrisville</p>	<p> <b>Implement and Rollout HR/Payroll Munis</b></p>	<p> <b>Rollout of Payroll System</b></p> <p> <b>Part-time Pay Plan</b></p> <p> <b>Data Analysis and Validation</b></p> <p> <b>Accrual Import into Munis</b></p> <p> <b>Import/conversion of personnel data records from legacy to Munis</b></p>
<p> <b>Obj. 5.6: Leverage the use of technology to maximize results</b> Morrisville</p>	<p> <b>Conduct North Carolina Health Insurance Pool (NCHIP) Implementation</b></p>	<p> <b>System Training and Report Development</b></p> <p> <b>COBRA Conversion from Infinisource to BenefitSolver</b></p> <p> <b>Data Import</b></p>
<p> <b>Obj. 5.6: Leverage the use of technology to maximize results</b> Morrisville</p>	<p> <b>Conversion to Electronic HR Records</b></p>	<p> <b>Meet with Vendor to Review Files</b></p> <p> <b>Received First Batch of Files and review</b></p> <p> <b>Receive Second Batch of files for review</b></p>
<p> <b>Obj. 5.3: Require the highest professional standards</b> Morrisville</p>	<p> <b>Align the Performance Evaluation Process to Connect Morrisville</b></p>	<p> <b>Met with Consultant to review current evaluation form/process and recommended updates</b></p>
<p> <b>Obj. 5.4: Attract, develop and retain a diverse, high-performing workforce</b> Morrisville</p>		<p> <b>Met with senior management to review consultant recommendations.</b></p>
		<p> <b>Incorporate Approved Connect Morrisville Consultant Recommendations for FY2020 Performance Evaluations</b></p>
	<p> <b>Created evaluations with approved revisions</b></p>	

**Target**

Project implementation and rollout of Enterprise System to 4/2020 and subject to change. (Updated 1/29/21) Adjusted dates for Accrual Import and Personnel Data Import and Milestone Analysis for each respective Milestone. Refer to Milestone Analysis for each with updated information.

**Description**

Initial data conversion of current employee information and validation as well as review of workflows and procedures all with a "go live" date of April 2020.


**Why It Matters**

The Enterprise System is a town-wide project to increase efficiencies and productivity.

**Analysis** CY Q2-21

Rollout of Payroll system completed 4/1/2020. Historical Personnel Data validation in progress through Q3.

**Objectives**

 **Obj. 5.6: Leverage the use of technology to maximize.**  
Morrisville

**Collection and Calculation Method**

**Data Collection Point(s) of Contact (if needed)**

Lauri Shedlick Nate Mayer Chuck Queen

**Data Collection Lead**

**Percent Complete** CY Q2-21

80 %



**Start Date**

6/3/19

**End Date**

9/30/21

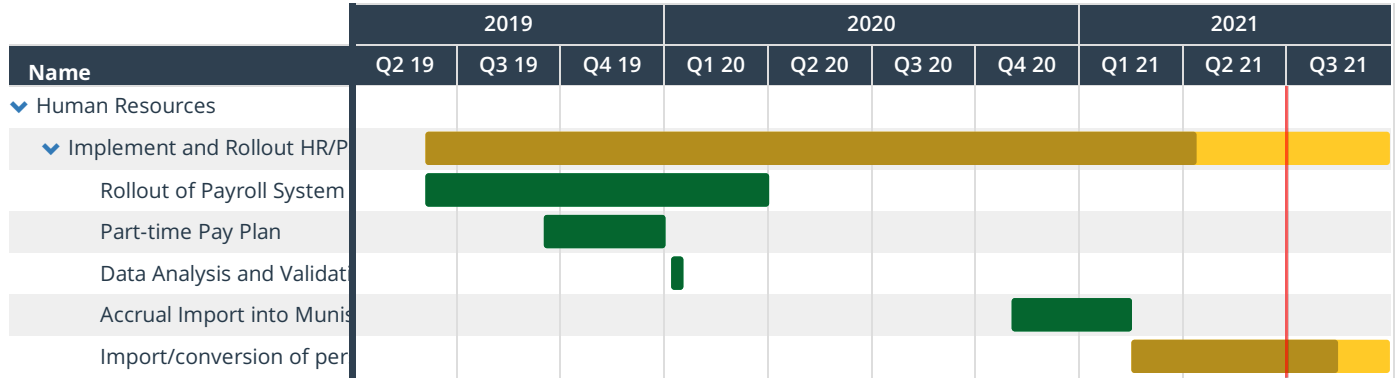
**Milestones**

-  **Rollout of Payroll System**  
Human Resources | Completed 4/1/20
-  **Part-time Pay Plan**  
Human Resources | Completed 1/1/20
-  **Data Analysis and Validation**  
Human Resources | Completed 1/9/20
-  **Accrual Import into Munis**  
Human Resources | Completed 4/22/21
-  **Import/conversion of personnel data records from ...**  
Human Resources | 2/15/21 - 9/30/21

Owner

 Nate Mayer

Gantt Chart



**Owner**

**Milestone Analysis** CY Q2-20

**Milestone Percent Complete** CY Q2-20

100 %


**Start Date**

6/3/19

**End Date**

4/1/20

**Initiative**

 **Implement and Rollout H.** 6/3/19 - 9/30/21 CY Q2-21

**Owner**

**Milestone Analysis** CY Q1-20

**Milestone Percent Complete** CY Q1-20

100 %


**Start Date**

9/16/19

**End Date**

1/1/20

**Initiative**

 **Implement and Rollout H.** 6/3/19 - 9/30/21 CY Q2-21



**Owner**

**Milestone Analysis** CY Q1-20

**Milestone Percent Complete** CY Q1-20

100 %


**Start Date**

1/7/20

**End Date**

1/9/20

**Initiative**

 **Implement and Rollout H.** 6/3/19 - 9/30/21 CY Q2-21

**Owner**

**Milestone Analysis** CY Q2-21

Completed March 2021

**Milestone Percent Complete** CY Q2-21

100 %


**Start Date**

11/2/20

**End Date**

2/15/21

**Initiative**

 **Implement and Rollout H.** 6/3/19 - 9/30/21 CY Q2-21



# Import/conversion of personnel data records from legacy to Munis

Human Resources

[Home](#)

[Scorecard](#)

[Outcome Measures](#)

[Initiatives](#)

[Milestones](#)

## Owner

### Milestone Analysis CY Q2-21

Data import completed. Moving forward with Personnel Data validation. TEST and TRAIN environment technical issues were resolved.

### Milestone Percent Complete CY Q2-21

80 %

### Start Date

2/15/21

### End Date

9/30/21

### Initiative



Implement and Rollout H. 6/3/19 - 9/30/21

CY Q2-21



Target

BenefitSolver initial implementation to include data migration, training milestones and ongoing evaluation beginning November 2018 and completed January 2019. COBRA data migration and conversion completed July 2019. Ancillary benefits information imported to MUNIS with ongoing review for BenefitSolver as determined.

Description

Implement BenefitSolver Administrator portal for North Carolina Health Insurance Pool (NCHIP) member maintenance, Convert COBRA administration from current vendor to BenefitSolver and evaluate Ancillary Benefits

Why It Matters

To provide competitive benefits and reduce overall medical insurance costs to provide a stable, budgetable and predictable renewal insurance rates.

Analysis CY Q2-21

All milestones completed on target with final implementation completed in January 2019.

Objectives

Obj. 5.6: Leverage the use of technology to maximize. Morrisville

Collection and Calculation Method

Data Collection Point(s) of Contact (if needed)

Human Resources Manager

Data Collection Lead

Percent Complete CY Q2-21

100 %

Start Date

10/1/18

End Date

7/1/19

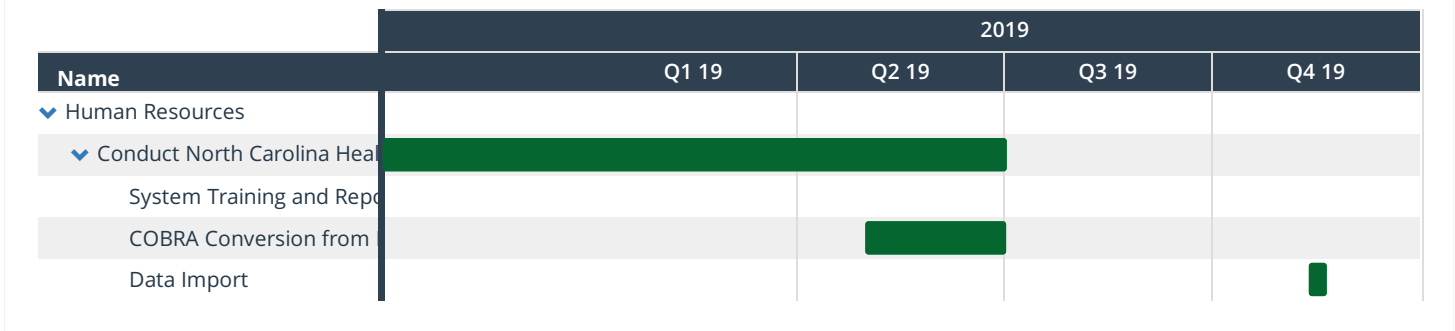
Milestones

- System Training and Report Development  
Human Resources | Completed 1/1/19
- COBRA Conversion from Infinisource to BenefitSolv...  
Human Resources | Completed 7/1/19
- Data Import  
Human Resources | Completed 11/20/19

Owner

Nate Mayer

## Gantt Chart



**Owner**

**Milestone Analysis** CY Q1-19

**Milestone Percent Complete** CY Q1-19

100 %


**Start Date**

11/15/18

**End Date**

1/1/19

**Initiative**

 [Conduct North Carolina ...](#) 10/1/18 - 7/1/19 CY Q2-21



Owner

Milestone Analysis CY Q3-19

Milestone Percent Complete CY Q3-19

100 %


Start Date

5/1/19

End Date

7/1/19

Initiative

 Conduct North Carolina ... 10/1/18 - 7/1/19 CY Q2-21

**Owner**

**Milestone Analysis** CY Q4-19

**Milestone Percent Complete** CY Q4-19

100 %


**Start Date**

11/13/19

**End Date**

11/20/19

**Initiative**

 [Conduct North Carolina ...](#) 10/1/18 - 7/1/19 CY Q2-21



### Target

To have all personnel files electronic scanned by end of January 2019 and ongoing HR scanning of other documents

### Description

Develop processing and disposition procedures for converting all hardcopy personnel files to electronic format upon initial conversion and going forward with all new personnel files.

### Why It Matters

Personnel files to be maintained electronically allowing for increased storage (physical storage space) and greater efficiency in review of personnel documentation. Scanning hard copy files to electronic format in Accordance with Approved Records Retention and Disposition Policy.

### Analysis CY Q2-21

Project completed on schedule and all personnel files are now being stored and maintained electronically through the Laserfiche repository.

### Objectives

 **Obj. 5.6: Leverage the use of technology to maximize.**  
Morrisville

### Collection and Calculation Method

### Data Collection Point(s) of Contact (if needed)

Nate Mayer

### Data Collection Lead

### Percent Complete CY Q2-21

100 %

### Start Date

8/1/18

### End Date

1/31/19

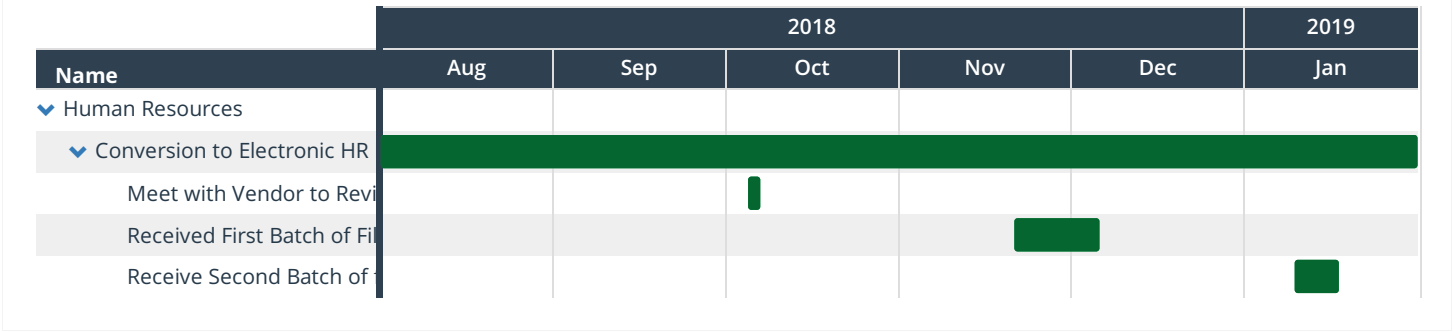
### Milestones

-  **Meet with Vendor to Review Files**  
Human Resources | Completed 10/5/18
-  **Received First Batch of Files and review**  
Human Resources | Completed 12/5/18
-  **Receive Second Batch of files for review**  
Human Resources | Completed 1/17/19

### Owner

 Nate Mayer

Gantt Chart



**Owner**

**Milestone Analysis** CY Q1-19

**Milestone Percent Complete** CY Q1-19

100 %


**Start Date**

10/5/18

**End Date**

10/5/18

**Initiative**

 [Conversion to Electronic...](#) 8/1/18 - 1/31/19 CY Q2-21



Owner

Milestone Analysis CY Q1-19

Milestone Percent Complete CY Q1-19

100 %


Start Date

11/21/18

End Date

12/5/18

Initiative

 Conversion to Electronic... 8/1/18 - 1/31/19 CY Q2-21



Owner

Milestone Analysis CY Q1-19

Milestone Percent Complete CY Q1-19

100 %


Start Date

1/10/19

End Date

1/17/19

Initiative

 Conversion to Electronic... 8/1/18 - 1/31/19 CY Q2-21



Target

FY2020

Description

To ensure that performance evaluation tool aligns with the Town's strategic plan.

Why It Matters

To promote understanding and accountability for the strategic plan throughout the organization.

Analysis CY Q2-21

Alignment of performance evaluation to Connect Morrisville completed August 2019. Incorporated strategic Town values into the annual performance evaluation (Integrity, Dedication, Courtesy and Innovation).

Objectives

- Obj. 5.3: Require the highest professional standards**  
Morrisville
- Obj. 5.4: Attract, develop and retain a diverse, high-p.**  
Morrisville

Collection and Calculation Method

Data Collection Point(s) of Contact (if needed)

Lauri Shedlick

Data Collection Lead

Percent Complete CY Q2-21

100 %

Start Date

12/5/18

End Date

8/2/19

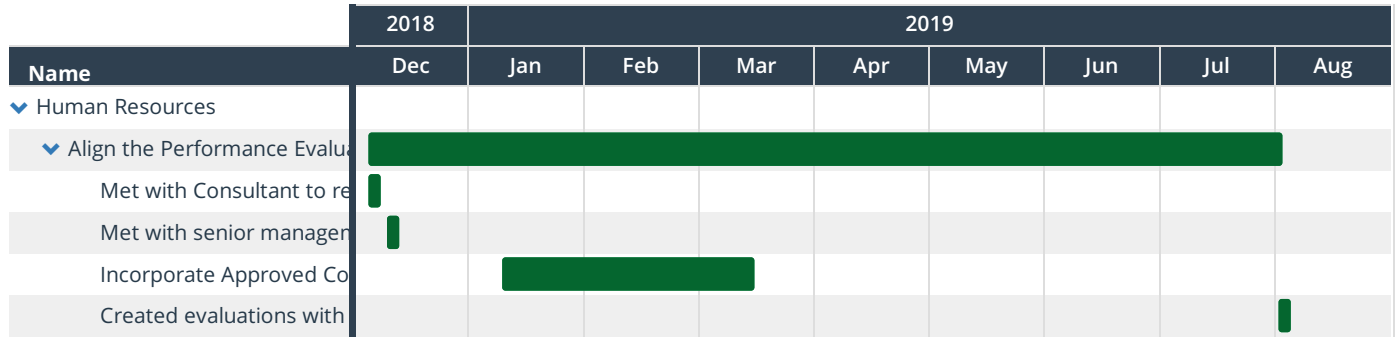
Milestones

- Met with Consultant to review current evaluation fo..**  
Human Resources | Completed 12/5/18
- Met with senior management to review consultant...**  
Human Resources | Completed 12/10/18
- Incorporate Approved Connect Morrisville Consulta...**  
Human Resources | Completed 3/15/19
- Created evaluations with approved revisions**  
Human Resources | Completed 8/2/19

Owner

Nate Mayer

Gantt Chart





# Met with Consultant to review current evaluation form/process and recommended updates

Human Resources

[Home](#)

[Scorecard](#)

[Outcome Measures](#)

[Initiatives](#)

[Milestones](#)

## Owner

## Milestone Analysis CY Q1-19

## Milestone Percent Complete CY Q1-19

100 %

## Start Date

12/5/18

## End Date

12/5/18

## Initiative

[Align the Performance Ev.](#) 12/5/18 - 8/2/19 CY Q2-21





# Met with senior management to review consultant recommendations.

Human Resources

[Home](#)

[Scorecard](#)

[Outcome Measures](#)

[Initiatives](#)

[Milestones](#)

## Owner

### Milestone Analysis CY Q1-19

### Milestone Percent Complete CY Q1-19

100 %


## Start Date

12/10/18

## End Date

12/10/18

## Initiative

 [Align the Performance Ev.](#) 12/5/18 - 8/2/19 CY Q2-21



### Owner

### Milestone Analysis CY Q1-19

### Milestone Percent Complete CY Q1-19

100 %


### Start Date

1/10/19

### End Date

3/15/19

### Initiative

 [Align the Performance Ev.](#) 12/5/18 - 8/2/19 CY Q2-21



Owner

Milestone Analysis CY Q3-19

Milestone Percent Complete CY Q3-19

100 %


Start Date

8/2/19

End Date

8/2/19

Initiative

 Align the Performance Ev. 12/5/18 - 8/2/19 CY Q2-21