

**BEACHWOOD CITY COUNCIL COMMITTEE OF THE WHOLE MEETING HELD AT
BEACHWOOD CITY HALL, COUNCIL CHAMBERS, 25325 FAIRMOUNT
BOULEVARD, ON MONDAY, OCTOBER 22, 2018 AT 5:30 P.M.**

The meeting was called to order at 5:31 P.M. by Council President Brian H. Linick.

ROLL CALL:	Present	J. Berns, B. B. Janovitz, B. Linick J. Pasch, E. Synenberg, J. Taylor
	Absent:	A. Isaacson
	Also Present:	Mayor M.S. Horwitz, D. Calta, L. Heiser, D. Pekarek, W. Griswold, K. Carmen, P. Conces, T. Turick, K. Zipay

1. **Mayor's Report.**

None.

2. **Discussion regarding Service Department Audit – Municipal Solutions.**

Mr. Linick introduced this item for discussion.

Mayor Horwitz gave background information regarding a potential Operations Audit of the Service Department.

Mayor Horwitz introduced David Frasier from Municipal Solutions.

Mr. Frasier introduced himself and discussed his qualifications.

Mr. Frasier discussed work examples for Municipal Solutions. Mr. Frasier also discussed the engagement letter that was sent to the Administration.

The engagement letter and work examples are attached hereto for the official record.

During the discussion, the Committee stated that they would like to do an audit of the City department by department.

Mr. Pasch asked Mayor Horwitz to obtain a quote for a comprehensive quote.

Mayor Horwitz stated that he would obtain the quote and then bring that information back to the Committee.

3. Discussion regarding NOACA Grant Application – Bridge to Acacia.

Mr. Linick introduced this agenda item and turned the discussion over the Mr. Griswold and Ms. Zipay.

Mr. Griswold gave background information on this item and stated that the next step in this process is to apply for a NOACA Grant for funding.

Mr. Linick instructed the Clerk to place this legislation on the next available Council agenda.

A motion was made at this time to recess the Committee of the Whole to continue discussion after the Regular Council Meeting.

Moved by J. Taylor, seconded by J. Pasch, at 6:55 P.M. recess the Committee of the Whole.

ROLL CALL:	Yes:	J. Berns, B. B. Janovitz, B. Linick J. Pasch, E. Synenberg, J. Taylor
	No:	None.
	Abstain:	None.
	Not Voting:	None.
		MOTION ADOPTED

The Committee of the Whole was recessed at 6:55 P.M.

4. Discussion regarding Recreation Fee Schedule for 2019.

After the Regular Council meeting adjourned, a Motion was made to reconvene the Committee of the Whole.

Moved by B. Linick, seconded by J. Berns, at 7:24 P.M. reconvene the Committee of the Whole.

ROLL CALL:	Yes:	J. Berns, B. B. Janovitz, B. Linick J. Pasch, E. Synenberg, J. Taylor
	No:	None.
	Abstain:	None.
	Not Voting:	None.
		MOTION ADOPTED

The next item discussed was the Recreation Fee Schedule for 2019.

Ms. Carmen stated that the proposed changes included fee increases at the pool, increases in camp fees, increase in child care fees, and the deletion of various programs that are no longer offered.

Those increases are outlined on a memorandum that was sent to Council in advance of tonight's meeting. That memorandum is attached hereto for the official record.

During the discussion, the Committee recommended changes to the fees for non-residents regarding the City of Beachwood Camp program.

Ms. Carmen stated that she would make those changes and they would be reflected on the legislation that will be in front of them for Council approval.

Mr. Linick instructed the Clerk to include this item on the next available Council agenda.

5. Discussion regarding Mooney's Boundary Line.

The Mooney's Boundary Line was the next item discussed.

Ms. Calta introduced this item and explained that the City of Beachwood and Orange Village were working together to move the Municipal Boundary lines at the property located at 27000 Chagrin Blvd.

Ms. Calta stated that the adjustment would be made to allow the property to be governed by the laws of one Municipality and it would also allow for effective enforcement of both Municipal Codes.

Ms. Calta stated that the adjustment would also rezone the property to U-9.

After the discussion, Mr. Linick instructed the Clerk to include this item on the next available Council agenda.

Mr. Linick asked if there were any further questions and there were none.

6. Any other matters coming before the Committee of the Whole.

None.

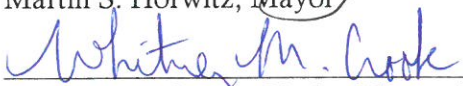
ADJOURNMENT

Moved by E. Synenberg, seconded by J. Pasch, at 8:23 P.M. to adjourn the Committee of the Whole to the next regularly scheduled Council Meeting.

Yes: J. Berns, B. B. Janovitz, B. Linick,
J. Pasch, E. Synenberg, J. Taylor
No: None.
Abstain: None.
Not Voting: None.
MOTION ADOPTED

Approved:



Martin S. Horwitz, Mayor


Whitney M. Crook, Clerk of Council

Pursuant to Ordinance Number 2017-107 Council has determined that the official Minutes of its Body, its Committees, and those of the Planning and Zoning Commission shall consist of the Audio Recording of the meetings together with a written synopsis of all agenda items and votes.

CITY OF *Beachwood*
INTEROFFICE MEMORANDUM

To: Council President Linick
Members of City Council

From: Martin S. Horwitz, Mayor *MSH*

Date: October 1, 2018

Re: Efficiency Study Proposal – Work Session Request

As you know, City Council met with a representative from the State Auditor's Office who gave us a presentation about Performance Audits. After that meeting, the administration was asked to explore options as it relates to a more in-depth study of efficiency for our Service Department.

Early in 2018, Finance Director Heiser reached out to a professional engineer (not associated with Beachwood) for a recommendation of companies who perform consulting services related to operational assessments. The concept of using local firms was discussed, but similar to that of the Auditor of State, reviews were based on analytics and although tied to benchmarks a review by accountants not necessarily familiar with local government operations. The City then reached out to the two consulting firms recommended - Matrix Consulting and Municipal Solutions.

The City recommends Municipal Solutions. Attached is a copy of their proposal/engagement letter as well as examples of their work. The work scope discussions, methodology, and examples provided by Municipal Solutions and Principal David Eversten are in-line with our expectations of what an overall efficiency study would provide. The Principal, David Eversten, is a former local government executive who has managed over 300 projects from school districts, cities, towns, and state agencies in more than 40 states with more than 20 years of experience.

Given the fact that there will be a transition of leadership in the Service Department, we believe now is the best time to move forward with such a study. We will benefit from the knowledge, history, and experience of our current leadership and then start fresh with the results of this study as we transition to new leadership.

We respectfully request a Work Session with City Council to review their proposal and to answer any questions. Municipal Solutions must have ample time to make travel arrangements and are currently holding October 15th. Please let us know as soon as possible if we can move forward and confirm October 15th.

MH/tt

Enclosures: Engagement Letter
Work Examples

Cc: Diane Calta, Law Director * Larry Heiser, Finance Director *Dale Pekarek, Service Director * Chris Arrietta, Assistant Service Director *Whitney Crook, Clerk of Council

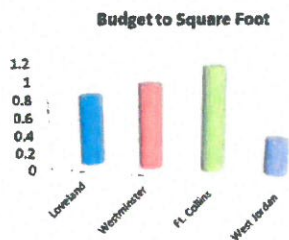
City of Fort Collins, CO

Efficiency Study

Operations Services Department

Final Report

January 2014



Custodial Services, Planning & Scheduling functions of HVAC Technicians, Aquatics Support Services, and Building Maintenance and Repair



Consultative Services for:
Ken Mannon, Director
Operations Services Department

Submitted by:
Municipal Solutions LLC
Jim Mullen, Senior Associate
Local Government Advisory Services
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Colorado Springs, CO 80906
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MUNICIPAL SOLUTIONS

PUBLIC SECTOR. INNOVATION. SOLUTIONS.

January 31, 2014

Ken Mannon, Director
Operations Services Department
City of Fort Collins, Colorado

Mr. Mannon:

Municipal Solutions, LLC has completed the work that you and your staff engaged our consultants to conduct for your department last year. We appreciated the opportunity you gave us to assist the city in analyzing the important services that you provide to Fort Collins and its citizens. This Final Report represents the complete results of our work examining opportunities for greater efficiency within the City's Operation Services Department (OSD).

Having assisted more than 300 local governments during the past 11 years, it has been our experience that local governments are similar, but not completely alike. The successful practices in one local government, for example, may not be effective, efficient or sustainable if attempted in another local government. While local governments often compare themselves to one another to improve organizational effectiveness, the most significant factor in making the *right* decisions about process, procedure, personnel, paperwork and planning - is context.

The findings and recommendations of our analysis provide a context, perspective and new approaches to familiar problems – and they should be easy to understand and relatively simple to implement.

Thank you for the opportunity to assist on this project. Rick Davis and Jim Mullen repeatedly conveyed how working with you and your staff was a real pleasure and the process of gathering insight and information could not have been more enjoyable. I am pleased.

On behalf of the Municipal Solutions Team, I hope you would not hesitate to contact us again as you move forward with implementation. Please do not hesitate to contact Jim Mullen with questions or new ideas. We look forward to working with you again and hearing from you in the weeks ahead.

Sincerely,


David A. Evertsen, CEO & Principal

Richard L. Davis, *Project Manager & Senior Associate*
Jim Mullen, *Deputy Project Manager & Senior Associate*



EXECUTIVE SUMMARY

Fort Collins is a Home Rule Municipality in and the county seat of Larimer County. Situated on the Cache La Poudre River along the Colorado Front Range, Fort Collins is located 57 miles north of Denver. With a 2010 census population of 143,986, it is the fourth most populous city in Colorado after Aurora, Colorado Springs, and Denver. Fort Collins is a midsize college city, home to Colorado State University. It was named *Money* magazine's Best Place to Live in the U.S. in 2006, #2 in 2008, and #6 in 2010.

The City's Operation Services Department (OSD) provides support for a variety of internal functions such as fleet management, system and energy management, real estate services, project planning and design, and facilities management. The Department, with regard to facilities, manages roughly 100 municipal facilities/buildings, making up approximately 1.5 million square feet. Meanwhile, the City has determined to outsource custodian services to three primary contractors who provide general custodial services, carpet cleaning, and window cleaning. Approximately 900,000 total square feet are serviced by these custodial providers. General building maintenance is, at the same time, provided internally by a staff of nearly two-dozen full-time equivalents. The plurality of these personnel is building maintenance technicians.

The Municipal Solutions team focused attention in its review of two primary areas: building maintenance technician work flow and coordination and custodial services. Our examination revealed that the Department enjoys several opportunities to improve the efficiency of its team of technicians. Meanwhile, the Department has the opportunity to decrease backlogs and improve customer service. On the custodial side, our outsourcing analysis benchmarking data indicate the appropriateness of continuing to outsource. We have also been able to validate the inspection process that the Department utilizes to verify contractor compliance.

In this final report, our team has provided the City with detail associated with a series of findings and actionable recommendations.

Special thanks to the following individuals for their assistance during this project:

- **Darin Atteberry**, City Manager for his interest in our assisting the City of Fort Collins in this capacity;
- **Wendy Williams**, Deputy City Manager for her coordination and oversight during the course of this project;
- **Ken Mannon**, Director of Operations Services for his access, availability, participation and cooperation in garnering the internal staff resources and information necessary to complete this assignment;
- **Tracy Ochsner**, Assistant Director of Operations Services for day-to-day project management including meeting facilitation and document control;
- **Employees** within the Operations Services Department; and
- **City Managers and staff of the Cities of Arvada, Boulder, Loveland, Northglenn and Westminster.**



INTRODUCTION

The Final Report

This final report is being provided at the completion of all on-site (field work) and off-site follow-up. While the preliminary report provided a cursory review of undeveloped finding areas, the final report contains a more comprehensive collection of findings and solutions which are immediately actionable and will produce effectiveness (causing a desired outcome), efficiency, and sustainability. The preliminary report was important because it provided a high level description of initial findings and thus communicated the team's intentions to focus further attention and energy on those subjects. It allowed City administration a chance to react to and/or participate in the development of these focus areas. Following submission of the preliminary report and subsequent discussion with department administration, the team was able to implement appropriate modifications to the preliminary report and insert final recommendations. We express our appreciation for the professionalism shown and cooperation provided by administration and staff during this study.

Purpose of the Study

Local governments, like the state and federal governments, continue to experience demands for services despite constraints. Citizen demands for the expansion of services that already exist and requests for new services place elected officials and administrators in a dilemma. It is important to note that increased citizen use of municipal services correlates strongly with economic distress. It is therefore incumbent upon municipal officials to prepare for this reality by addressing the efficiency of support functions to ensure that citizen services can meet demand. This principle applies to the provision of services to internal customers as well.

In this study, we conducted a high-level examination of the City of Ft. Collins' Operation Services Department, with specific emphasis on technician work flow and coordination of custodial services.

Like many municipalities in this economic climate, Ft. Collins wishes to provide superior services to its citizens and internal customers while maintaining fiscal responsibility. Two keys associated with achieving both goals are:

- 1) Closely examining departmental processes and
- 2) Creating new efficiencies wherever practical.

Municipal Solutions has been retained to provide a review of the Department's operations. This review will give the Operation Services Department the information it needs to make clear decisions that affect its ability to deliver efficient services now and into the future. Specifically, the study's objectives are as follows:

- Explore selected services provided by the OSD to include, as determined by the OSD Director, (a) janitorial services and (b) planning scheduling functions of HVAC technicians, aquatics support services, and building maintenance and repair. This examination includes needs, skills, processes, resources, and priorities to determine whether improvement to operational efficiency and expenditure reductions can be realized.
- Examine functions and evaluate the form or structure in Operations Services only as is necessary to determine whether it is optimal towards fulfillment of these functions, the Department and City-wide goals, objectives and priorities; and determine whether the current resources (personnel, technology, and physical assets) are being used efficiently.

- Determine optimization alternatives to the organization's functions, forms/structure, and resources.
- Determine if, where, and why internal stop-gaps are failing and how they can be remedied.
- Determine and quantify the most effective strategy to accomplish the Department's organizational objectives.
- Determine the most effective means for reducing the cost of operations while improving service delivery and service quality.
- Establish the basis for internal assessments, controls, monitoring, and reporting for perpetual organizational improvement to these ends.

Methods

- Interviews with management and key departmental staff.
- Interviews with key city staff.
- Examination of City policies and procedures.
- Data collection, examination, and analysis.
- Examination of departmental records.
- Review of departmental generated reports.
- Examination of departmental infrastructure.
- Interviews with and data collection from other communities.
- Interviews with private contractors and service providers.
- Collection and review best practices from communities throughout the nation.

Consultant Team

Below are brief biographies of our key consultants on this project. More information can be viewed at in the back of this report and on our website at www.MunicipalSolutions.org/bios/?page=experts&cID=2.

Richard L. Davis, ICMA-CM

Project Manager & Senior Consultant. Research / report writing.



Mr. Davis has significant expertise in the following areas:

Analytics, Budgeting Capital Projects Management, Contract Administration, Economic Development, Finance, Human Resource Management, Performance Auditing / Measures, Public Relations and Strategic Planning,

Mr. Davis began his public career as a Performance Auditor in the Office of the Auditor General in Arizona, where he was charged with analyzing the operations of state divisions and departments, evaluating efficiency and compliance with state law, and making recommendations for policy change to the State Legislature. Significant accomplishments include:

- Discovering and reporting \$3 million growing deficit in Industrial Commission's workers compensation reimbursement fund with associated violations of state law.
- Finding deficiencies in the Department of Revenue's taxpayer information system and making recommendations, significantly improving citizen access to tax information.
- Making recommendations to state legislature to streamline the technical registration requirements and processes associated with various professions, resulting in significant cost savings to the State of Arizona.
- Discovered mismanagement of grants and funding at the Department of Education & made recommendations for greater accountability and efficient processing of federal

grants.

- Brought greater legislative attention to the problem associated with leaking underground storage tanks in Arizona.

Mr. Davis has been awarded Credentialed Manager status by the International City Management Association (ICMA) and is currently the Town Manager of Fountain Hills, AZ. Prior to this, he served as City Manager of West Point, UT and the Assistant to the CAO/Community Affairs Director of Sandy, – Utah's third largest city. His public sector experience includes a six-year stint as the Director of Corporate Communications with the largest life insurance company in the Western United States, Beneficial Life.

He holds an MPA and a BA in Public Relations from Brigham Young University. Mr. Davis' most recent work with Municipal Solutions includes the Efficiency Studies for the City of Daytona Beach, FL.

Jim Mullen, ICMA-CM, USAF (ret.) Senior Consultant, Deputy Project Manager & Client Relations



Mr. Mullen offers a multi-faceted functional background with experience in operations, finance, personnel, board management and media relations. He is skilled at integrating vision into tactical strategies, creating performance-driven operations, collaborating with diverse business interests in a synergistic fashion, and capitalizing on market opportunities to develop new business.

After graduating from the Air Force Academy with a BS in International Affairs and Political Science, Mr. Mullen spent four years in the Air Force, rising to the rank of Captain. He began his private sector career as a Group Manager with the Denver Chamber of Commerce followed by a position with Mile High United Way as a Government Relations Specialist. He earned an MPA from the University of Colorado in 1976 prior to taking a position as Assistant to the Mayor of Charleston, SC. This led to the Assistant City Manager position in Casper, WY.

Mr. Mullen's public administration career progressed rapidly with positions as City Administrator for: the City of Greenwood Village, CO and the City of Colorado Springs, CO where he served as the Chief Executive Officer for a 2300 employee, \$230M city government serving 360,000 citizens with a nine-member city council and a full range of municipal services. He also served as Deputy City Manager, Aurora, CO and County Executive in Prince William County, VA. Most recently,

David A. Evertsen, MPA, MMP

Principal Consultant / Editor



Principal consultant to hundreds of municipalities, school districts and state agencies throughout the United States, Mr. Evertsen has over 20 years of experience in the public and private sector in: *Organizational Analysis, Personnel Compensation Studies, Negotiations and Arbitration*. Mr. Evertsen has Master's Degrees in Public Administration (MPA) and Urban Planning (MUP) and is a three-time former City Manager. He has managed several similar projects which include:

- ✓ Personnel Compensation, Classification and Restructure for Utah Cities of Pleasant Grove, Pleasant View and Harrisville as well as the Cities of Shawnee, OK; Elko, NV; Huron, SD.

- ✓ Organizational Assessments for the Cities of Clearfield, UT; Arkansas City, KS; Delray Beach, FL; Daytona Beach, FL; Parkland, FL; Tequesta, FL; Jupiter Island, FL; La Habra Heights, CA..
- ✓ Strategic Planning work for West Jordan, UT; Hurricane, UT; Mesquite, NV; Goodyear, AZ; Queen Creek, AZ; Buckeye, AZ; and Flagstaff, AZ.

Mr. Evertsen has been recognized nationwide for his ability to "make significant contributions while facing difficult constraints," and has repeatedly positioned agencies and staff to handle tremendous and possible unanticipated change, due in part to knowing "how to get the job done, through analysis, vision, and successful collaboration of skilled resources." He is an accomplished public speaker in local, national and international settings.

Mr. Evertsen's degrees include: Master of Public Administration - University of Kansas; Master of Urban & Regional Planning - University of Kansas; Bachelor of Political Science - Weber State University; and Associates Degree (Business) – BYU Idaho.

Austin R. Roy**Analyst**

Austin R. Roy has worked on similar studies, research efforts, and projects for the Cities of West Jordan, Springville, and Municipal Solutions. He recently completed work on a benchmarking study for the City of West Jordan, under the direction of Richard L. Davis, City Manager.

Austin graduated with a BA in Political Science from Brigham Young University in 2011. He is currently a student at Southern Utah University in the Masters of Public Administration program.

Additional consultant biographies can be viewed at MunicipalSolutions.org/bios/?page=experts&cld=2.

FINDINGS

FINDING ONE

The Department can improve its organization and supervision of technicians and the process of work.

Building maintenance technicians generally lack adequate supervision and coordination.

Our review of workflow processes in the building maintenance and repair division show a general lack of work prioritization and technician supervision/coordination. The process of receiving and processing work requests from internal customers shows little stratification of priorities or criteria upon which the priorities are based. In fact, staff reports that 90% of work orders received from internal customers are assigned a "normal" priority label. Meanwhile, 10% are assigned a "rush" status. According to our interviews of division heads and internal customers, there exists no recognized rationale as to how work order assignments are prioritized for completion. In essence, technicians are left to themselves to determine which work orders should be filled, and in what order they should be completed. This lack of criteria for setting priorities with rational stratification leaves customers disconnected from the status of their requests, and hence can lead to a lack of customer satisfaction.

The City of Loveland prioritizes work orders in accordance with the date when work is to be completed. Daily technician work is, meanwhile, monitored by administrative personnel that assign work orders and provide signoff when work is completed. In Westminster and Boulder, priorities are assigned in accordance with perceived safety. Again, in Westminster, those tasks that show the closest nexus with safety are performed first. Technician work is monitored several times per day. In Arvada, work orders are prioritized by the facilities director; but no further clarification or rationale was provided to our team. Finally, in Northglenn, work order priorities are set in accordance with the rank or status of the person requesting.

Meanwhile, our team found no established method for tracking or monitoring daily technician work. Management expresses no doubt regarding the dedication and productivity of its staff; however, unlike Westminster, management is not always cognizant of the current or real time status of work being performed. In fact, the technicians do not share their individual prioritization with management on a formal basis, resulting in the need to query the status of each work order to determine status. This situation contributes little to the administration's ability to completely account for the allocation of resources at any given period of time. Such may also exacerbate customer dissatisfaction, since customers may reach out to management in an attempt to discover the specific status of their project or work order.

There exists an inability on the part of the Department to effectively track and account for work being performed.

City personnel are not completely utilizing the established system for tracking work requests. The system, iService, is the City's automated means by which departments and divisions should provide OSD with building maintenance and repair requests. Unfortunately, interviews with staff reveal that a mere 25% of requests currently flow through iService. More typically, City personnel utilize emails, phone calls, and personal contacts to request maintenance and repairs. While technicians state that they do in fact attempt to open cases for these types of requests, they admittedly state that such interface is not

consistently completed. Without the universal use of this automated work tracking and distribution system, it is entirely impossible to adequately track the efficiency of the technicians. In addition, the lack of system use complicates the ability of the Department to track the time and resources being expended on various projects/work orders.

In our survey of other cities, we found that all, excepting Arvada and Northglenn, utilize some automated system associated with making, assigning, and tracking work orders. Northglenn is in the process of implementing such a system, while Arvada utilizes a physical form-based system. The cities of Loveland, Westminster, and Boulder report very high compliance associated with work request submission. Nevertheless, none of the survey cities appear to have employed a sophisticated methodology for tracking technician performance.

Further, of that work tracked by the Fort Collins Department, the inclusion of data associated with more extensive capital projects may obfuscate the true measurement of workflow. Specifically, technicians are called upon to perform three primary services: preventative maintenance, corrective work (repairs), and projects. While preventative maintenance and repairs are generally executed within short time frames, projects vary with regard to how quickly they can be completed. Projects which may require many weeks and even months to complete can and likely do serve to exaggerate timeliness measures when included with preventative maintenance and corrective work metrics.

The inclusion of capital projects in technician workflow can cause and probably is resulting in the inability of the staff to maintain stasis with preventative maintenance and repairs.

The Department identifies three types of work orders that are assigned to technicians from the divisions of OSD. They are corrective work orders which involve repairing or replacing equipment or fixtures, preventative maintenance orders which represent routine work based on criteria such as the life cycle of equipment, and finally project work orders which require the response of a technician to complete all or part of a project such as new construction or remodeling. The inclusion of these larger capital projects into the workflow of technicians is likely contributing to an increasing number of backlogged work orders in the corrective and preventative work order system. Our review found that a grouping of 86 work orders, some of them dating back to January of this year, are currently in "carryover" status. Staff, meanwhile, states that involvement in these larger projects makes timely completion of corrective routine maintenance and repairs difficult. Also, because of the amount of time required to complete these larger projects, some staff members interviewed report having to hurry past needed repairs they note while performing preventative maintenance, all in an effort to avoid backlogs. One such staff member stated, "If I'm out changing the filter and I notice that a bearing is out, there is really not much I can do about it." Such omissions can in fact cost the City much more in the future, due to delayed maintenance, than would be required if such conditions were corrected when first observed.

Interviews with other city departments reveal far less in terms of work order backlogs. While Loveland reports that they have been able to eliminate work order backlogs through appropriate staffing and active management of work, Westminster policy dictates that no project or work order can last beyond four days. Northglenn officials, meanwhile, state that if any project or task requires more than 2 to 3 days to complete, it is outsourced.

We noted that the determination as to whether or not the Department will provide technical support to a project is made via a "negotiated" process that includes top management, but in which there is no involvement of division heads or staff, such as the Facilities Planner Scheduler. While it is clear that the Department Head should make the final decision in these matters, the method of handing down the

results can have an adverse effect on the Department's ability to complete corrective and preventative maintenance work orders in a timely manner. In the long run, this can have a more detrimental impact on the Department's customer service satisfaction than may be understood.

The scope of the Facilities Planner/Scheduler position should be expanded in order to help provide enhanced workflow coordination and customer service.

The Department has filled the position of Facilities Planner/Scheduler and is looking to the new incumbent to more effectively coordinate the assignment and tracking of work orders to technicians. We believe this position is the key to improved accountability and should be assigned to utilize the new TMA software (maintenance management software) and the existing iService program to ensure that management is fully informed on the work status of each technician and the work orders assigned. Further, this staff member should provide a more active role in assigning, tracking, and prioritizing the daily work performed by technicians to include the open work orders backlog. In addition, the scheduler/planner can and should assist the Department in keeping customers informed with regard to the status of projects utilizing the new TMA software and the iService system to automate reports to customers from inception to completion of the work. Finally, our examination finds a broader need for the expansion of this individual's duties in order to enhance workflow coordination and lift customer service. Specifically, as will be discussed in Finding 2, this individual can and should be included in the process of billing appropriate departments and divisions.

Finding One Recommended Solutions

- The Department should complete modifications to the existing work order system in order to assign expected dates of completion to each work order/job. This date should serve as the primary means of project or task prioritization. Use of previous prioritization labels should be deemphasized.
- In concert with the above, the Scheduler/Planner should be instructed to maintain the status of all projects and routine maintenance/repairs. Such status information should be accessible by departmental administration.
- City and department administrations should impress, upon city personnel, the critical nature associated with the use of iService. Further, similarly to the position taken by the city's IT Department, units of the city should understand that work will not be performed unless requests are logged into the iService system. OSD personnel should not initiate any work, regardless of how the request was received, unless the work order is logged into iService.
- The Department should separate larger projects from current work tracking metrics. Timeliness tracking should exclusively measure work orders associated with routine maintenance and corrective action (repairs).
- The City should consider the addition of personnel to be specifically assigned to larger capital projects. Meanwhile, the Department should consider project thresholds that trigger the consideration of outsourcing as an alternative to internal staff use.
- The Department should expand the role of the Scheduler/Planner in the coordination of workflow and communication with external units. Specifically, this person should be involved in the initial designation of work completion deadlines, the tracking of technician work, and customer communication.



FINDING TWO**The process of billing City departments and divisions can be modified to increase billing accuracy and payment timeliness.**

Resources associated with the execution of maintenance, corrective, and project work are tracked by the Department. However, similar to other cities, only certain units are billed for work performed by OSD. Specifically, those divisions and departments/entities that enjoy funding sources independent of the general fund are billed for labor and materials associated with OSD work. Nevertheless, our review found that the process of billing these entities can be refined in order to increase billing accuracy and save staff time.

Interviews with staff, including the Assistant Director of OSD, revealed multiple incidences wherein City units were errantly billed for materials and services. In one specific instance, a unit was not billed at all for its accrual of \$75,000 in labor and materials. As the process illustrated in this report indicates, after work is performed and the relevant work order is closed out, department administration queries the system for these closed work orders, typically during the second week of every month. Administration then creates a list of "billables" and forwards these invoices to division heads to verify billing accuracy. These division heads merely provide a verbal authorization to administration before bills are forwarded to the appropriate department, division, or unit. Complications are often introduced into this billing process in at least two ways.

First, a division head may negotiate certain elements of the bill with consuming units. For example, a division head, unbeknownst to administration, may agree to charge a division or department for the resources or materials needed for a project and waive costs associated to labor. Second, our examination found that it is not uncommon for billings to be incomplete. Specifically, a technician or division head may calculate a billing for a consuming division or department and fail to include invoices associated with materials. This type of omission may require administration to bill consuming units in more than one installment. Our team finds that the primary cause of these complications lies with the reality that administration is detached from the projects being executed by the technicians. The billing clerk in administration is sometimes and perhaps even often unaware of specific arrangements that the department may or may not have made with the consuming unit. Meanwhile, because of this dislocation from the project, she may also be less aware of whether a billing is inclusive of all elements. In conclusion, the department can benefit from a refinement of the process, which will increase billing accuracy and minimize multiple billings of the same consuming unit. Finally, interviews reveal a timeliness issue associated with customer payment remittance. In fact, according to staff, it is not uncommon for some departments to forgo payment remittance for several billing cycles. A lack of payment timeliness unnecessarily causes OSD staff to expand time and resources on collection efforts.

OSD Work Execution Process



Finding Two Recommended Solutions

- The City should consider the creation of a work order clerk within OSD to play a primary role in ensuring that billings are complete (inclusive of all elements, including invoices and receipts) prior to forwarding to department administration. In addition, the Scheduler/Planner should coordinate with the work order clerk to ensure that billings are accurate prior to forwarding to department administration.
- City administration should impress upon all departments the importance of timely remittance of payment for OSD services. The OSD Director should interface with the Assistant City Manager when customer payment remittance is not timely.

FINDING THREE**OSD should take advantage of process changes in order to lift customer service.**

General recommended process changes and the eminent upgrade of TMA will provide the Department with an opportunity to make significant strides in lifting customer service.

As mentioned previously, current work management methodologies have exacerbated work backlogs. In addition, the lack of work order prioritization has resulted in some customer requests becoming delayed indefinitely. Meanwhile, other projects are postponed or delayed due to complications that arise during the process of project execution. For whatever reason that can be attached to why a project is not completed in a timely manner, there currently exists no methodology for keeping customers apprised of the status of their specific request. Meanwhile, customers themselves may in fact contribute significantly to this lack of communication if, for example, they do not utilize iService to submit a request.

The impending upgrade of TMA will provide department leadership with a "seam in the side walk," by which they can implement changes to processes recommended in this report, and thus lift customer service. We believe that customer service will be most likely enhanced by providing the customer, at the beginning of the process, with an expectation relative to a completion date. In addition, we believe the customer should be apprised of the status of his/her request during the work process, especially when complications associated with the project may postpone or delay work. The final report will contain specific recommendations associated with lifting customer service.

Finding Three Recommended Solution

- The Department should take advantage of impending software upgrades to implement a higher level of customer service and communication. Such coordination should be inclusive of all departmental personnel. This is an opportunity for department administration to explain the potential for service elevation and enlist the support and enthusiasm of departmental personnel in the implementation of solutions.



FINDING FOUR

Fort Collins should continue to outsource custodial work. However, the city should more closely scrutinize future bids.

Our examination of current outsourcing practices reveals the appropriateness of this methodology. Nevertheless, benchmarking reveals that Fort Collins pays its contractor more per 1000 ft.² cleaned than other comparable communities. In addition, the city's incentive component of the current general custodial contract is unique when compared to the contracts of other cities. The Department should consider the appropriateness of the continued inclusion of that incentive.

The City maintains three separate contracts associated with the provision of custodial work for their inventory of approximately 100 buildings, a total of approximately 1.5 million square feet of municipal space. These contracts consist of one for general custodial at an annual cost of approximately \$650,000, another for floor maintenance (carpeted areas) at an annual cost of \$350,000, and yet one other contract for window cleaning at \$44,000 per year.

In consideration of general custodial, the contractor utilizes approximately 25 full-time equivalents to provide 200 hours of custodial work per day. Meanwhile, some buildings are cleaned daily, while others are cleaned one or more times per week. Regardless, given that consumables such as cleaning solutions and paper products make up, according to the contractor, 8 to 10% of the total contract; and assuming that if the City were to bring custodial work back in-house OSD would incur a similar cost for consumables, we can show the cost comparison between in sourcing and outsourcing custodial work.

There are several assumptions that we must make here in order to provide an appropriate analysis. For the purposes of this study, we will assume an average hourly wage of nine dollars per hour. We will also assume that if the City were to provide this service themselves, it would require the same number of full-time equivalents currently being provided by the general custodial contractor. We will also assume that consumables associated with custodial service will cost the same for the City as they currently do for the contractor, approximately \$65,000 per year. Given these assumptions, we can provide the following analysis:

Insourced Custodial	Annual Costs	Outsourced Custodial (Contract)	Annual Costs
LABOR	\$608,000	LABOR	\$585,000
(\$9/hr. @ 2080 hours per year. Benefits are calculated 30% of salary.)		(Total contract of \$650,000 less 10% associated with consumables.)	
CONSUMABLES	\$65,000	CONSUMABLES	\$65,000
TOTAL	\$673,000	TOTAL	\$650,000

While there may not initially appear significant deviation between the two totals, no consideration has been provided in this analysis for the additional workload that would need to be accommodated by human resources, as well as Department and City administration, if custodial services were provided internally. The City would also likely need to provide workers with identifying clothing and equipment, and would have to assume certain risk elements associated with the provision of the services. All things considered in this preliminary report, outsourcing custodial work appears to be the appropriate and prudent methodology, mostly because our team found no motivating factor associated with providing custodial services internally.

Our survey of other comparable community methodologies for the provision of custodial services confirms the appropriateness of the Fort Collins outsourcing approach. Of the comparable Colorado cities utilized in our benchmarking, most outsource custodial work. In addition, it is obvious that though cities in our examination that provide custodial service in-house pay more per 1000 ft.² than do communities that outsource. Nevertheless, of the outsourcing cities, Fort Collins, pays more per 1000 ft.² cleaned at \$1,333, then do, for example, Loveland at \$800 and Westminster at \$1,138. Arvada, which provides custodial service in-house, pays \$1,486 and Northglenn, another in-house city, pays \$2,009. No data was available for Boulder. A Utah community, West Jordan, which is similar in size and complexity to the other cities examined, also outsources custodial and pays approximately \$700 per 1000 ft.² cleaned.

One reason that may explain why in-house providing cities tend to spend more per square foot than do outsourcing cities is that they tend to utilize more full-time equivalents than do outsourcing cities. According to Fort Collins' current custodial provider, 25 full-time equivalents are utilized to provide custodial service. This equates to .027 FTEs per 1000 ft.². Arvada and Northglenn, in contrast, utilize .04 and .039 FTEs respectively. West Jordan, meanwhile, utilizes a contractor that employs a mere .012 FTEs per 1000 ft.² cleaned. Fort Collins may have the opportunity, therefore, to lower their custodial costs by negotiating with the contractor a lower dedication of personnel.

Please see the benchmarking section 4 charts that illustrate the above data.

Finding Four Recommended Solutions

- The Department should continue to outsource custodial services.
- In the appropriate timeframe, the Department should renegotiate contracted services, specifically scrutinizing the provision of a contractor incentive and the dedication of full-time equivalents to custodial services. Our team believes there exists a significant opportunity to lower service costs when the contract is next bid.

FINDING FIVE**Custodial and technician benchmarking**

Integral to this report is the benchmarking of custodial services and technician programming with communities of similar size and complexity. As of the preliminary report, our team surveyed five comparable cities: Loveland, Westminster, Boulder, Arvada, and Northglenn. We acknowledge and appreciate the cooperation that these cities provided. This final report includes additional benchmarking, as well as a comparable Utah community in the comparisons.

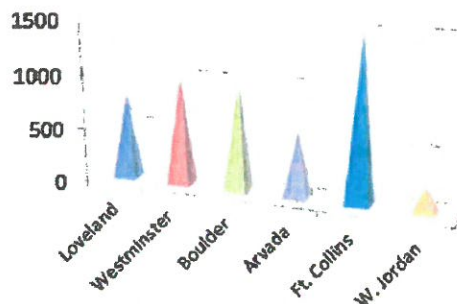
Custodial

As mentioned previously, three Colorado communities utilized in the study outsource their custodial services; namely Loveland, Westminster, and Boulder. The loan Utah community, West Jordan (population 110,000), also outsources. In the case of Boulder, custodial services are required in a decentralized manner. Each Department contracts or determines its own custodial service level and provider. Two of the benchmark cities have insourced their custodial services; namely, Arvada and Northglenn.

The outsourcing cities appear to use a variety of contractors, and most break services provided out by general custodial, flooring, and windows. As was possible, we were able to compare Fort Collins' costs for total custodial (general custodial, flooring, and windows) by square foot. At this point, this comparison was only possible with two other cities: Loveland and Westminster. Nevertheless, this preliminary analysis shows that Fort Collins pays \$1.16 per square foot, while Westminster and Loveland pay \$.96 and \$.80 respectively. West Jordan pays a little less than \$.40.

In each of the cities that outsource custodial, employees are required to participate in some custodial duties. Two of the three cities require employees to centralize trash collection, and Westminster actually engages employees in day cleaning duties. With regard to contractor duties, services provided appear to be similar to Fort Collins among all comparable cities. Meanwhile, two of the four outsourcing cities employ a formalized inspection program related to custodial services. Only Boulder allows their contractor to provide self-inspection. Unlike Fort Collins, other outsourcing cities provide no monetary incentive associated with contractor performance. While preliminarily it appears that Fort Collins pays more per square foot specific to custodial services, two of the outsourcing cities provided our team with the caveat associated with employing the low bidding custodial contractor. Boulder warned, "Don't just go with the low bidder, but go with the option that's most compatible with expectations." All outsourcing cities appeared moderately satisfied with the level of service they are receiving.

**Total Municipal Space
in Million Sq/ft**

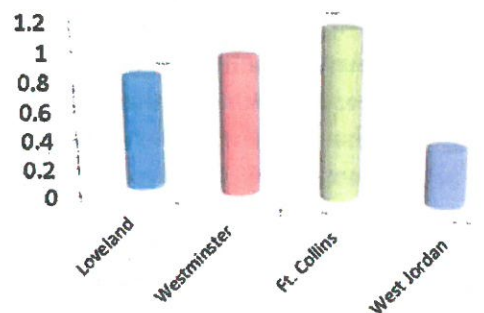


Square Footage

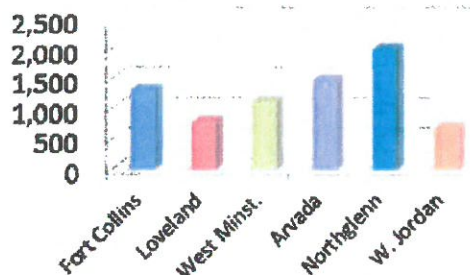
Far and away, Fort Collins' 1.5 million square feet represents the largest amount of municipal area of all of the comparable communities. This chart illustrates square feet in thousands.

Of those outsourcing cities included in the survey, Fort Collins appears to have the budgeted expense per square foot cleaned.

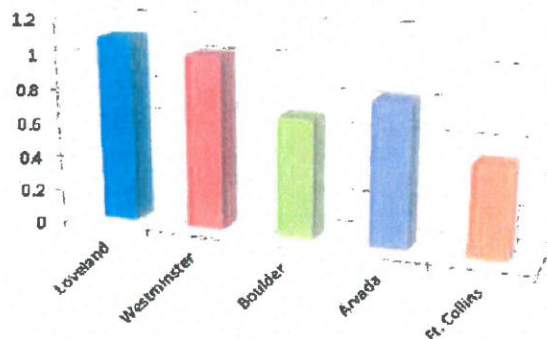
Budget to Square Foot



**Annual Cost per 1,000
Square Feet**

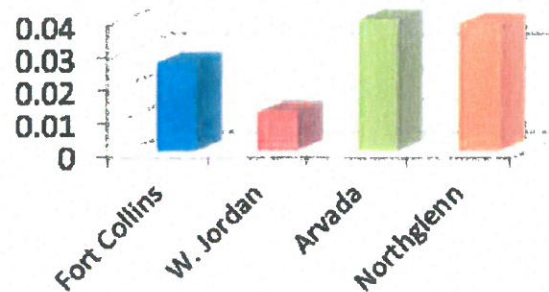


Both the City of Fort Collins and the City of West Jordan outsource custodial. Their contractors employ less FTEs per thousand square feet than do insourcing Arvada and Northglenn.

Technicians per 100,000 sq. ft.**Technicians**

Only one key measure was compared in our benchmarking of technician deployment. Specifically, we compared Fort Collins' staffing of building technicians to those in four other comparable communities; namely Loveland, Westminster, Boulder, and Arvada.

With a near eight technicians to care for 1.5 million square feet of municipal space, Fort Collins ranks lowest among the comparable cities with .53 technicians per 100,000 square feet. The City of Loveland ranked first with 1.1 technicians per 100,000 square feet. The chart below illustrates this comparison.

FTE per 1,000 Square Feet



FINDING SIX**Adequacy of custodial inspections**

In our reviews with OSD management, we noted a consistent concern with the nature, adequacy, and number of inspections of the work performed by the City's custodial contractors. Our examination found that the custodial inspections are conducted daily by the Building Operations and Custodial Contract Division Manager, a city employee, and a representative of the custodial contractor. Under the terms of the contract, the company is incentivized to correct problems and complaints via a "bonus system" that is shared among the contractor and its employees, amounting to 5% of the contract amount. The manager is a new employee, having joined the staff one year ago, and formerly worked for the city's main custodial contractor.

As indicated in Finding Five, our research shows that the Ft. Collins system provides the number of inspections comparable to other cities. In terms of the nature and adequacy questions, however, we found a number of concerns to be addressed by the Department. The method of conducting the inspections is inclusive and professionally sound. The manager employs software, "It's a Breeze," to track the inspections and shares the results with the contractors representative on site at the time of the inspection. The contractor's on-site representative is stationed adjacent to the manager's office. This arrangement facilitates rapid response to customer complaints and/or the findings of on-site inspections. However, we found that daily complaints/observations passed on verbally from the manager to the contract representative and the actions taken in response are not recorded in either the "It's a Breeze" software or as a work order in the "iService" system. Similarly, the comments made on the bi-annual inter-city services survey also are not tracked in the software. Finally, the reports produced by the software are not reviewed by upper management on a regular time basis.

We also found that flooring and window inspections are made on an as-needed basis, with representatives of the respective contractors present. While these inspections are less frequent, due to the nature of the work performed, we noted a need to use the results of these on-site visits to develop an improved data base for planning present and future work. Such issues associated with the variance in wear and tear on different floor areas and the timing and completeness of exterior versus interior window cleaning could be better addressed if data from inspections was available to upper management and contract managers.

Overall, we find that while the nature, adequacy, and frequency of custodial inspections is satisfactory, there are improvements that could be made that would ensure more oversight from top management and improved customer service by better utilizing the data and findings of the inspections of all three contractors' work.

Finding Six Recommended Solution

- The Department should require that window and flooring inspections be completed on a regular basis. The inspection data should be used to develop a database which will assist the Department in planning for maintenance and replacement.



FINDING SEVEN**Customer satisfaction**

In our interviews with Department leadership we found a consistent level of concern with the issue of customer satisfaction with OSD services; this in spite of the Department's generally high ratings on the city's bi-annual inter-city services survey. Leadership concerns tend to concentrate around the comments made by respondents as opposed to the actual ratings. Other evidence of customer concerns have manifested themselves as comments received from city leaders on custodial services in their facilities, including the city council areas and the utilities department offices. In addition, interviews with division heads and staff reveals staff believes that customer frustration exists specific to the difficulty of obtaining work order status information, building maintenance backlogs, and a general perception of favoritism connected to customer responsiveness.

Finding Seven Observation

- The implementation of solutions recommended in this report should substantially address the customer service deficiencies we observed.



ADDITIONAL OBSERVATIONS & POSSIBLE FINDINGS**Additional Observations and Possible Findings**

During the course of our study, the team observed issues to which we recommend Administration pay special attention.

- The City commissioned a study of the maintenance staffing in April 2010. A finding of that analysis indicated that OSD was understaffed; this according to a stated industry-standard. The study established a benchmark of 22.5 FTEs to obtain a "level 2" service level. Our review found that OSD has indeed made progress, and currently employs 21.5 front – line FTE. The Department should consider annual evaluation of staffing levels. Notwithstanding the above, building technicians staffing appears to lag that of other communities with whom we compared staffing. Further analysis may be required to determine adequate deployment.
- While total OSD staffing appears to be appropriate for the current inventory municipal space, our review provided no analysis associated with possible consolidation of building use. The City may desire to consider a future analysis of this type.
- Management requested that our team provide information with regard to other comparable city administration of credit cards. This information is provided in the survey results included as part of this preliminary report. The City may want to conduct a more extensive audit and review of credit card administration policies to ensure proper controls are in place.
- The employment of a bonus or incentive element as part of the custodial contract does not mirror the practice of other cities that participated in this study. The City may want to reevaluate its use.
- Examine reorganization options to improve communication lines.



Fort Collins Custodial Services Survey

	Comparable Cities & Survey Respondents				
Key Indicators	City of Loveland William D Cahill, City Manager Keith Reester, Director of Public Works (970) 962-2520 Ken Cooper, Facility Manager (970) 962-2635 (970) 420-8523	City of Westminster Brent McFall, City Manager Debbie Mitchell, Director of General Services (303) 658-2006 Jerry Cinkosky, Facilities Manager (303) 658-2160	City of Boulder Jane Brautigam, City Manager Maureen Rait, Director of Public Works (303) 441-3227 Joe Castro, Facilities Manager (303) 441-3163	City of Arvada Mark Deven, City Manager Bob Manwaring, Director of Public Works 720-898-7601 Phil Hensley, Director of Facilities Management (720) 898-7681	City of Northglenn John Pick, City Manager David Willet, Building Maintn. Supervisor (303) 450-8783 Paula Jensen, Custodial Services Supervisor (303) 450-8877
Outsource / In-source	Outsource	Outsource	Outsource*	In-source	In-source
# FTE dedicated to custodial	-	-	-	12 FTE's	4.3 FTE's
Annual Budget: Total annual budgeted expense for custodial?	\$400,000	\$410,000	Each city department contracts or decides it's own custodial (parks and rec., police, library, utilities, open-space). When consolidated, getting the right price & quality wasn't possible.	\$343,200 (\$22,000 for each worker plus 30% for benefits).	\$205,000 (Approximately \$16,000 for Supplies and Contractors; and \$189,000 for salaries).
If outsourced, name of contractor(s)	Porter Industries (Located in Loveland)	KG Clean & Budget Building Services	Porter Industries	-	-
Annual Contract: What is the annual contract amount for each provider?	\$400,000	KG Clean \$280,000 & BBS \$68,000 Remainder for carpet and windows.	\$75,000 (includes general custodial, trash, and carpets)	-	-
Many municipalities will contract a portion of total custodial duties to a general custodial company, also contracting with another to clean carpets and yet another to clean windows.					

Efficiency Study

City of Ft. Collins, CO

Is there any portion of custodial duties performed by employees? If yes, then What?	Employees are required to distribute their trash to a central location.	Yes. Day cleaning (in rec. centers) restrooms and common areas (entry ways).	Yes. In specific facilities one employee performs all general custodial services. There is a zero-waste effort program in place and because of this we try to reduce as much trash as possible and only have centralized trash receptacles.	-	-
Custodial Services: What general custodial services does your contractor provide?	Vacuuming, dusting, trash removal, recyclables, window and glass cleaning, hard surfaces.	Trash, Vacuuming, hard surfaces, detail (all done 2 days a week). Restocking restrooms, and cleaning common areas (done daily). Recycling (done once a week).	Restrooms, re-supply, dusting, mopping, trash removal, vacuuming, hard surfaces, compost, and recyclables.	-	-
Total sq/ft: What is the Total sq/ft of municipal space you have responsibility for?	800,000 Sq. Ft.	360,000 Sq. Ft. (19 facilities)	90,000 Sq. Ft. (Total municipal space is 1,000,000 Sq. Ft.)	-	-
Total sq/ft cared for by contractor?	500,000 Sq. St.	All	80,000 Sq. Ft.	-	-
Inspection Program: Have you implemented an inspection program to verify contractor performance? If so, please describe.	Each building has an attendant that does a morning inspection (informal daily check). On a weekly basis there will be a formal walkthrough done of all facilities. Emergency requests, or specific needs can be submitted through Cleantelligent Software.	Have a contract services coordinator that deal directly with contractors. Every two months there are inspections, and follow-up on issues happens within 2 weeks.	Contractor has its own self inspection program and they give us reports. Feedback can also be submitted through a work order system.	-	-
Contractor Incentives: Do you utilize a contractor incentive to encourage optimal performance?	No, there is no monetary incentive in place. Contracts are for one year and new bids taken every 4 years. Use contracts as incentive.	No. However, we believe in partnerships, a give and take compromise. We have a mutual agreement and they do what is expected.	No.	-	-

Efficiency Study

City of Ft. Collins, CO

If so, what metrics do you use?					
Customer Satisfaction: What is your perception of internal satisfaction as such relates to custodial services?	Moderate levels of satisfaction. Survey sent out every 14 months and custodial satisfaction was lower than other dept, but still good (80% of respondents gave a good to excellent rating).	Fairly good. Custodial services scored 3.8 out of 5 on the last annual survey.	Good, there seems to be satisfaction with the current level of service.	-	-
Advice / Cautions: Any regrets or cautions that you would share with regard to your method of custodial?	No, the contractor serves the needs of the city and does a satisfactory job. Possibility of quicker turnaround, but overall it is good.	Cautions going with the low bid. Regrets that they don't get paid well. To prevent turnover you should pay higher for full-time. Have a prevailing wage rate (same as if it was in-sourced).	Contract out all custodial if possible. It is good to be cautious and methodical in the selection process of a contractor. You must question bids (why are they so low, etc.) Don't just go with the low bidder, but go with the option that's most compatible with expectations for Sq. Ft. per hour.	-	-

Fort Collins Technicians Survey

Key Indicators	Comparable Cities & Survey Respondents				
	City of Loveland William D Cahill, City Manager Keith Reester, Director of Public Works (970) 962-7520 Ken Cooper, Facility Manager (970) 962-2635 (970) 420-8523	City of Westminster Brent McFall, City Manager Debbie Mitchell, Director of General Services (303) 658 2006 Jerry Cinkosky, Facilities Manager (303) 658-2160	City of Boulder Jane Brautigam, City Manager Maureen Rait, Director of Public Works (303) 441-3227 Joe Castro, Facilities Manager (303) 441-3163	City of Arvada Mark Deven, City Manager Bob Manwaring, Director of Public Works 720-898-7601 Phil Hensley, Director of Facilities Management (720) 898-7681	City of Northglenn John Pick, City Manager David Willet, Supervisor of Building Maintenance (303) 450-8783 Paula Jensen, Supervisor of Custodial Services (303) 450-8877
Fill in total Sq/ft of municipal space	800,000 Sq Ft.	980,000 Sq. Ft. (38 Facilities)	1,000,000 Sq. Ft.	600,000 Sq. Ft.	
# technicians as F/T equivalents	9 FTE's	10 FTE's	7 FTE's	5 FTE's	3 FTE's
<u>Work Orders:</u> Use an automated work order system? Name?	Yes. Cityworks, a web based program(IT team has been customizing it).	Yes. Accela (want to get rid of it)	Yes. Sprocket.	None.	Yes. Cityworks (still in the process of programming it).
<u>Maintenance Requests:</u> Are employees required to submit requests to facility maintenance via this automated system? % compliance?	Yes. There is about 80-90% compliance on average for tickets being submitted through the automated system.	Yes. There is about an 80% level of compliance. Those that don't submit requests speak directly with facilities manager.	Yes. All requests (email and phone calls) are put into work orders. Very high compliance.	Forms are used. All work order requests must be submitted on a form.	Not currently. Requests are received through email and phone call. Foreman then fills out work-orders for the requests.

Efficiency Study

City of Ft. Collins, CO

Work order Priorities: How are work orders prioritized? How is daily technician work monitored?	All requests are assigned a date when the work is expected to be completed by <i>(The goal is to meet or exceed these)</i> . More than 90% of requests are serviced by the indicated date. Daily technician work is monitored by admin. personnel that assign work orders and then sign off when complete.	Priority is done by safety items first. Orders are received in the morning, and stay in touch with technicians throughout the day. Each technician is given an estimated 7 hours of work per day.	Work orders are prioritized according to health and safety risks first and everything else second. Admin. specialist prints work requests and they are sent out. It is annotated when a request is closed. Preventative work is done when there are no work orders.	Facilities Director decides the priority of work to be done. He signs off on completed work orders after inspecting the work has been done.	Requests coming from higher up the chain of command take first priority. Capital projects are high priority. Daily technician work is monitored through a list of work and it is reviewed weekly.
Work order Billing: Are repairs, maintenance, or projects billed or charged to consuming departments/divisions? Which divisions or departments?	Day to day repairs and/or maintenance is not charged, but big projects are. This includes all departments, since it is difficult to budget for certain projects.	Yes and no. Enterprise Funds are billed for materials (these prices are negotiated). General Fund is not billed.	Yes, but depends on a complex chart. Even full-services are charged.	Yes, all enterprise fund departments and divisions are billed. However, they are only billed for materials unless it is a specific project not budgeted for.	No. Everything is covered by the facilities account. Only General Fund is covered by facilities technicians.
Payment Processing: Do technicians process city credit cards? What controls do you have in place to ensure appropriate use?	Yes. Receipts must be turned in on a monthly basis (typically turned in weekly though) and then they are reviewed at the end of the month to ensure appropriate use.	Yes. They are limited to 300 purchases a month. Finance checks P-Cards. They are audited once per month. Very strict with the use of cards.	Yes. All receipts must be submitted for purchases.	Yes. All receipts for the month's purchases are submitted in a packet and signed off by the Director of Facilities. The packet is then audited by the finance department.	Yes. There is a limit on every card of \$500. For more expensive needs supervisor approval is needed. At the end of every month cards are reviewed.
Outsource Maintenance: What maintenance work do you outsource? For each work category, why do you outsource?	Most heavy duty jobs are outsourced. Other work outsourced includes: Plumbing (only major work), electrical, roofing, and painting. Outsourcing is used because there is just not enough consistent demand to make it viable to do it in-house.	Almost all types of work are outsourced. For example when someone goes on vacation they will outsource. All backup is contracted. Have a philosophy of adding money instead of people. Painting is totally contracted, so is fire safety, elevators, generator maintenance, and bay doors.	About 65% of work is outsourced (replacement of systems, HVAC, plumbing, and electrical). Outsource because there is too many Sq. Ft. per person. Also no ability to hire new workers, we can be more nimble and bring in experts when needed, and avoid the overhead costs associated with training etc.	Outsourced maintenance work includes: elevators, fire extinguishers, some mechanical work (HVAC) when bogged down, window washing, plumbing, and pest control.	All big jobs are outsourced. Also: Plumbing, HVAC, heating, and remodeling.

Efficiency Study

City of Ft. Collins, CO

Performance Measures: What performance measures do you have in place to gauge technician performance?	Completion of work orders within allotted time-frame.	None. Only monitor total square foot cost per department. May eventually be a part of new program.	Preventative maintenance and closing of work orders. This is currently a work in progress. Hope to improve measures of performance.	None currently, but just about to start new performance based budgeting system.	None. Staff is well experienced though (each with almost 20 years of experience). Trying to encourage regular training though.
Backlogs: To what degree do work order backlogs exist? What remedies have you sought to alleviate backlogs?	Backlogs no longer exist (used to be a problem). Some remedies to alleviating backlogs include: being properly staffed, managing workers, and ability to outsource when needed (mid to large size projects).	Policy dictates that no project or work order can go beyond 4 days. Most items are handled within one day. If it's an emergency then it is handled immediately.	There is a backlog in money. A whole list of projects that need to be done exists but there is not funding for them. Energy savings performance and replacing old systems with energy saving options can help.	No backlogs currently exist. If they ever do it is a very short list. Most work orders have a 1 day turn around (3 to 4 days in worst case scenarios). Some larger projects can take longer. Just do our jobs.	An active list exists. If anything takes more than 2-3 days to complete it is outsourced. It's all about finding the time to get things done.



SCHOOLS

MUNICIPAL

STATE

FEDERAL



MUNICIPAL SOLUTIONS

INNOVATION SOLVING PUBLIC SECTOR PROBLEMS.

OPERATIONS STREAMLINING & RISK AUDITS

All public agencies face significant risk associated with "P-Issues" - People, Planning, Policies, Processes, Procedures, and Paperwork. These risks compound in the absence of trained experts who identify and remedy these issues, risks and liabilities. Self-audits are impossible. Hiring an independent Efficiency Expert or Performance Manager is critical.

Operations, Performance, and Forensic Audits are necessary to effectively identify waste and fraud to attain efficiency and innovation within your organization while minimizing the negative impacts that revenue reduction can have on service quality.

We make the tough decisions easier.

Our consultants are experienced in conducting public and private agency assessments having served more than 300 clients in 5 years. Whether facing financial challenges or hoping to minimize risk - we can get your organization through it.

Consultant experience includes municipal government, school districts, state agencies, the US Federal Government and private industry including:



BENEFITS

The benefits of an **Operations Streamlining and Risk Audit** include:

- Process & Service Quality Improvement.
- Validation of Best Practices.
- Minimization of Fraud, Legal Risks & Waste.
- Efficient use of Assets, Personnel & Technology.
- Independent verification of Cost Savings potential.
- Discovery of Alternative Revenues.

POTENTIAL AUDIT AREAS

Our audits include the following areas:

A) REVENUE & EXPENDITURE ANALYSIS

- Maximizing your agency's revenues:

- Alternative funding strategies,
- Alternative revenue streams and financial resources.
- Current revenue sources to determine if current revenue streams are under-utilized or over-utilized;
- Legal taxing alternatives;
- Availability, feasibility and implementation aspects of grants and other alternative financial resources for current sustainment and future program implementation



B) SERVICE CONSOLIDATION / PRIVITIZATION

- Evaluate and compare potential for improvements to revenues, expenditure and service quality under a shared and cooperative service or privatization model.

1. Law Enforcement, Fire Protection & Dispatch,
2. Solid Waste Disposal, Water Treatment, and more.



ANCHORAGE ALBANY BILLINGS BURLINGTON DALLAS DENVER PHOENIX WEST PALM BEACH

INNOVATION SOLVING PUBLIC SECTOR PROBLEMS.

- C) **ORGANIZATIONAL STRUCTURE** - Examination of system-wide organizational structures & expansion or consolidation of services and departments.

- D) **PERSONNEL** - Review of staffing requirements and personnel:



1. Adequate staffing numbers to perform all required services safely, efficiently, and effectively;
2. Compliance with personnel policies, hiring standards and employee job classifications;
3. Performance measurement;
4. Payroll procedures;
5. Salaries and benefits;
6. Management practices of supervisory personnel;
7. Personnel training programs;
8. Consolidated of functions of classifications;
9. Make recommendations to correct deficiencies discovered in personnel analysis.

- E) **INFORMATION TECHNOLOGY HARDWARE & SOFTWARE**
- Evaluate data processing and technology assets:



1. Inventory system-wide data processing assets;
2. Determine adequacy and efficiency of existing assets;
3. Conduct system-wide needs for data processing, service personnel, equipment, hardware, software;
4. Safety and security;
5. Records storage, space and alternatives;
6. Staffing levels & benefit of additional technologies;
7. System-wide data processing functions. Duplication by departments, practicality / cost effectiveness of consolidation; and
8. Projections for system-wide needs for the next five (5), ten (10), fifteen (15), and twenty (20) years.

- F) **SYSTEM-WIDE OPERATIONAL POLICIES** - Evaluate existing system-wide operational policies for effectiveness, adequacy, and functionality.

- 1) Operational policies and performance standards;
- 2) Performance and compliance measurement;
- 3) Policy effectiveness, adequacy and functionality of operational policies; MISSING PERCENT
- 4) Establishing benchmark governmental operational policy standards;
- 5) Compare and contrast established benchmark policy standards with current operational policy standards and;
- 6) Make recommendations to correct deficiencies.

- G) **PROCUREMENT & PURCHASING** - Evaluate procurement and purchasing practices utilized by your agency in an attempt to determine:

1. Legal purchasing guidelines are being followed;
2. Evaluate purchasing policies and practices;
3. Statutory compliance;
4. Identify weakness in internal and external control mechanisms;
5. Competitive bidding compliance;
6. Determine effectiveness of supply ordering and requisitioning systems;
7. Examine appropriateness of forms utilized;
8. Identify concerns in receiving goods;
9. Evaluate technology utilized in purchasing; and
10. Recommendations to correct purchasing and procurement deficiencies.

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INNOVATION SOLVING PUBLIC SECTOR PROBLEMS.

H) **MANAGEMENT OPTIONS** - Identifying innovative options for addressing core management challenges facing your government agency.

I) **CUSTOMER SERVICE** - Analyzing and evaluating government services provided to the general public and existing standards of performance for delivery of these services, and

1. Examine all government services provided;
2. Measure through survey methods the quality of services and citizen satisfaction; and
3. Make recommendations for improving public policies relating to or eliminating various services.

J) **ACCOUNTING & BUDGETING** - Analyzing accounting, auditing, and financial management procedures employed by your agency:

1. Determine if established policies and legal regulations are being followed;
2. Examine existing departmental accounting, auditing, and financial management policies for compliance and adequacy;
3. Ensure that proper accounting practices and verification procedures are in place for each department that receives public funds;
4. Identify weaknesses in internal and external control mechanisms for each department;
5. Determine if any existing practices are conducive to fraudulent activities;
6. Evaluate your agency's budget process for statutory compliance and efficiency;
7. Evaluate compliance with mandated federal, state, and special loan program accounting and reporting practices;



8. Make recommendations to improve accounting and auditing operations in order to correct deficiencies.

K) **LEGAL COMPLIANCE** - Conducting a legal compliance to determine if system-wide operations are functioning legally within state and federal statutory schemes:

1. Identify controlling local, regional and national law with regard to governmental operations of particular state constitutional or statutory office and officers, including but not limited to state laws regarding planning, zoning, building permits and inspections, storm water control, solid waste and clean air concerns; local and national workplace regulations and required benefits;
2. Compare system-wide operations with identified controlling legal regulations to determine level of compliance;
3. Identify noncompliant aspects of governmental operations; and
4. Recommend corrections to compliance deficiencies.



L) **LITIGATION ANALYSIS** - Conducting a litigation analysis of claims against the City and claims brought by the City to:

1. Review past and present litigation involving the your agency;
2. Identify the various types of claims against your agency;
3. Determine if patterns of claims against your agency can be identified;
4. If patterns can be identified, and make recommendations for corrective actions; and
5. Measure the effectiveness, efficiency, and adequacy and cost benefit of legal representation utilized by your agency.

INNOVATION SOLVING PUBLIC SECTOR PROBLEMS.

- M) RULES, POLICIES & PROCEDURES** - Evaluating all internal rules, policies, and procedures for compliance, adequacy, and effectiveness.
- N) RECORDS STORAGE / RETENTION** - Evaluating an agency's data processing and technology assets:
- 1) Identify and inventory system-wide data processing assets;
 - 2) Efficiency and adequacy of existing assets;
 - 3) System-wide needs for data processing and service personnel, equipment, hardware, software;
 - 4) Safety and security concerns to include legal requirements for storage, inspection, disclosure, and confidentiality of government records;
 - 5) Evaluate records storage, space, and alternatives;
 - 6) Make recommendations for staffing levels & needed data processing equipment;
 - 7) Determine if system-wide data processing functions are being duplicated by other departments, and if so, would it be practical and cost effective to consolidate these functions; and
- O) RISK MANAGEMENT ANALYSIS** - Conduct a risk management evaluation to include:
1. Compliance with contractor & employee insurance and bonding requirements;
 2. Adequacy of risk management programs, safety programs and insurance coverage;
 3. Cash management, fixed assets inventory, and investment practices;
 4. Fraud potential and vulnerabilities.
 5. Adequacy of undesignated fund balances;
 6. Appropriateness of out-of-budget cycle appropriations from undesignated reserve funds;
 7. Outstanding indebtedness and legal programs; and
 8. Benefits and cost savings of re-negotiation and re-financing options.
 9. Site safety and security
- 8)** Project cost estimates for system-wide needs for the next five (5), ten (10), fifteen (15), and twenty (20) years.

The more comprehensive the audit, the more dramatic the results.

We encourage the opportunity to speak with you in the days ahead to discuss your needs, and how our services can help your agency. Initial no-charge consultation. We guarantee our services.

INNOVATION SOLVING PUBLIC SECTOR PROBLEMS.

LOCAL OFFICES NATIONWIDE

REGISTERED OFFICE (UNITED STATES)

875 SOUTH ESTRELLA PARKWAY, #5038 GOODYEAR, AZ 85338

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EFFICIENCY STUDIES, OPERATIONS AUDITS & PERSONNEL PROJECTS

Over the past 14 years, we have helped small local governments, provincial governments and national government agencies save more than \$351,109,000 through comprehensive organizational assessments, prudent recommendations and effective implementation. It's through our efforts conducting Organizational Efficiency Audits, Compensation Studies, Organizational Structure Realignment, Process Re-Engineering and Policy Manual revisions that more than 400 public and private sector agencies have realized greater revenue collections, reduced fraud and improved public access to public services. Results include:

US LOCAL GOVERNMENT (does not include international projects)

- ✓ **Bankruptcy / near-Bankruptcy** management for cities of Belmont, TX; Vallejo, CA
- ✓ **Consolidation** efforts of Louisville / Fulton County; Kansas City / Wyandotte Co.; Nashville / Davidson County; Richmond / Virginia Beach, Lexington / Fayette County
- ✓ **Development Services:** Streamlining operations, staffing & organization structure
- ✓ **Facilities Maintenance:** Examining facility size and use for repair, consolidation and / or disposal of harbors, libraries, conference centers, police and fire facilities, and public utilities.
- ✓ **Fleet Maintenance:** Finding \$240,000 in excess Fleet Management costs
- ✓ **Franchises:** Discovering \$600,000 in underpaid Utility Franchises.
- ✓ **IT:** Discovering \$120,000 in overpayment of leases and software licenses
- ✓ **IT:** Assessing Information Technology and Software-caused inefficiencies, and
- ✓ **Public Works Privatization:** \$400,000 in Outsourcing, Privatizing & Public-Private Partnerships.
- ✓ **Staffing:** Determining \$450,000 in overstaffing.
- ✓ **Utilities:** Recovering \$650,000 in uncollected debt from delinquent utility customers.
- ✓ **Utilities:** Identifying \$500,000 in uncollected revenue due to under-registering water meters.

Links to full reports and exciting results:

Citizen Surveys

- Arkansas City, KS: [Local Survey of Customer Service from 3-Perspectives: Citizens, Council & Employees](#)

Consolidation & Privatization

- Parkland, FL: [Public Works, Parks, Streets](#)

Compensation, Classification, Reorganization, Job Descriptions and Policy Manuals

- Shawnee, KS: [Salary & Benefits All Departments](#)

Customer Service

- Arkansas City, KS: [Professional Survey of 3-Perspectives: Citizens, Council & Employees](#)

Efficiency & Operations Audits (includes facilities, policies, procedures, operations and management)

- Sitka, AK: [Facilities, Fleet, Public Safety, Utilities, Personnel, Management & Operations](#)
- Delray Beach, FL: [Fire, Police, Fleet, IT, Risk Management, Planning](#)
- Arkansas City, KS: [Fire, Police, Fleet, IT, Finance, Planning, Legal & more](#)
- Fort Collins, CO: [Building Maintenance, Custodial Services](#)
- Clearfield, UT: [Fleet Maintenance Study](#)

Visit us at www.MunicipalSolutions.org or [email us](#) for work samples.

UNITED STATES OFFICES

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The following pages contain a partial client list with some project details and costs.

US LOCAL GOVERNMENT

CITY OF ST CLOUD, FL (POP. 46,000)

UNDERWAY

➤ INTERIM FINANCE DIRECTOR

CONTACT: LESLIE FLORES, PURCHASING MANAGER / WILLIAM STURGEON, CITY MANAGER
PHONE: 07-957-7318 EMAIL: LLFLORES@STCLOUD.ORG / WSTURGEON@STCLOUD.ORG
PROJECT COST: \$48,000

TOWN OF INDIAN RIVER SHORES, FL (POP. 4,228)

UNDERWAY

➤ COMPENSATION & CLASSIFICATION STUDY WITH ORGANIZATIONAL STRUCTURE RE-ALIGNMENT.

CONTACT: ROBBIE STABE, TOWN MANAGER
PHONE: 772-231-1771 EMAIL: TOWNMANAGER@IRSHORES.COM
PROJECT COST: \$9,500

CITY OF BELLVILLE, TX (POP. 4,170)

UNDERWAY

➤ INTERIM FINANCE DIRECTOR FOR THE IMPLEMENTATION OF OPERATIONS AUDIT FINDINGS

CONTACT: SHAWN JACKSON, CITY MANAGER
PHONE: 979-865-3136 EMAIL: SJACKSON@CITYOFBELLVILLE.COM
PROJECT COST: \$24,000

CITY OF GALLUP, NM (POP. 22,261)

UNDERWAY

➤ COMPENSATION & CLASSIFICATION STUDY WITH ORGANIZATIONAL STRUCTURE RE-ALIGNMENT. ➤ ASSIST BENEFITS COMMITTEE TO RESEARCH, IMPLEMENT NEW EMPLOYEE BENEFITS PROGRAM

CONTACT: MARYANN USTICK, CITY MANAGER
PHONE: 702 994-3649 EMAIL: MUSTICK@GALLUPNM.GOV
PROJECT COST: \$50,000

CITY OF COVINGTON, KY (POP. 42,000)

UNDERWAY

➤ ORGANIZATIONAL EFFICIENCY ASSESSMENT: PROCESS, PERSONNEL, ASSET & FINANCE, COMPENSATION, CLASSIFICATION, AND ORGANIZATIONAL STRUCTURE RE-ALIGNMENT. ➤ FINANCE DIRECTOR SEARCH

UNDERWAY

CONTACT: DAVID JOHNSTON, CITY MANAGER
PHONE: 206.391.2712 EMAIL: DJOHNSTON@COVINGTONKY.GOV
PROJECT COST: \$45,000



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CITY OF COVINGTON, KY (POP. 42,000)

COMPLETE

➤ EXECUTIVE SEARCH – CITY MANAGER

CONTACT: LOREN WOLFF, INTERIM CITY MANAGER
PHONE: 859.801.9706 EMAIL: LOREN@WOLFFLAWKY.COM
PROJECT COST: \$24,000

CITY OF SYRACUSE, UT (POP. 27,775)

COMPLETE

➤ BUSINESS PROCESS AND ORGANIZATIONAL EFFICIENCY ASSESSMENT & MASTER PLAN

CONTACT: BRODY BOVERO, CITY MANAGER
PHONE: 801-614-9622 EMAIL: BBOVERO@SYRACUSEUT.COM
PROJECT COST: \$47,000

CITY OF COCONUT CREEK (FL) (POP. 56,792)

COMPLETE

➤ EXAMINATION OF COMMUNITY TRANSIT FACILITIES AND EVALUATION OF OPERATIONS, MAINTENANCE, MANAGEMENT AND EXPANSION ALTERNATIVES.

CONTACT: JIM BERKMAN, PUBLIC WORKS DIRECTOR
PHONE: 954-734-5066 EMAIL: JBERKMAN@COCONUTCREEK.NET
PROJECT COST: \$22,500

CITY OF BELLVILLE, TX (POP. 4,170)

COMPLETE

➤ ORGANIZATIONAL EFFICIENCY ASSESSMENT: PROCESS, PERSONNEL, ASSET & FINANCE, COMPENSATION, CLASSIFICATION, AND ORGANIZATIONAL STRUCTURE RE-ALIGNMENT.

CONTACT: SHAWN JACKSON, CITY MANAGER
PHONE: 979-865-3136 EMAIL: SJACKSON@CITYOFBELLVILLE.COM
PROJECT COST: \$31,712

CITY OF SITKA, AK (POP. 9,020)

COMPLETE

➤ ORGANIZATIONAL EFFICIENCY ASSESSMENT: PROCESS, PERSONNEL, ASSET & FINANCE, COMPENSATION, CLASSIFICATION, AND ORGANIZATIONAL STRUCTURE RE-ALIGNMENT.

CONTACT: MARK GORMAN, CITY MANAGER
PHONE: 907-747-1808 EMAIL: MARKGORMAN@CITYOFSITKA.COM
PROJECT COST: \$50,000

CITY OF TECUMSEH, OK (POP. 6,597)

COMPLETE

➤ COMPREHENSIVE ASSESSMENT & RECONSTRUCTION OF SALARIES & BENEFITS, JOB DESCRIPTIONS, JOB CLASSIFICATIONS & PERSONNEL POLICY MANUAL

CONTACT: JIMMY STOKES, CITY MANAGER
PHONE: 405-255-3501 EMAIL: JIMSTOKES@TECUMSEHOK.ORG
PROJECT COST: \$15,000

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CITY OF SAFFORD, AZ (POP. 9,602)

COMPLETE

- COMPENSATION & CLASSIFICATION STUDY WITH ORGANIZATIONAL STRUCTURE RE-ALIGNMENT.

CONTACT: HORATIO SKEETE, CITY MANAGER
PHONE: 928-432-4021 EMAIL: HSKEETE@SAFFORDAZ.GOV
PROJECT COST: \$5,000

CITY OF LARGO, FL (POP. 78,409)

COMPLETE

- EXECUTIVE RECRUITMENTS AND ORGANIZATIONAL STRUCTURE RE-ALIGNMENT OF TWO POSITIONS FOR BUILDING & PLANNING DEPARTMENTS.

CONTACT: CAROL STRICKLIN, COMMUNITY DEVELOPMENT DIRECTOR
PHONE: 727-586-7490 EMAIL: CSTRICKL@LARGO.COM
PROJECT COST: \$50,272 (\$21,552 + \$28,700)

CITY OF AVONDALE, AZ (POP. 78,822)

COMPLETE

- LEADERSHIP SUMMIT WITH CITY COUNCIL, STRATEGIC PLANNING RETREAT AND DEVELOPMENT OF STRATEGIC PLAN FOR THE CITY.

CONTACT: STEPHANIE KARLIN, VICE MAYOR
PHONE: 623-293-1176 EMAIL: IZHTTU@HOTMAIL.COM
PROJECT COST: \$31,687

CITY OF SHAWNEE KS (POP. 30,533)

UNDERWAY

- COMPREHENSIVE ASSESSMENT & RECONSTRUCTION OF SALARIES & BENEFITS, JOB DESCRIPTIONS, JOB CLASSIFICATIONS & PERSONNEL POLICY MANUAL

CONTACT: BRIAN MCDOUGAL, CITY MANAGER (now Port Arthur, TX)
PHONE: 409-983-8101 EMAIL: BEMCDUGAL@GMAIL.COM
PROJECT COST: \$25,000

TOWN OF DARTMOUTH, MASS (POP. 30,666)

COMPLETE

- COMPREHENSIVE EFFICIENCY ASSESSMENT AND EFFICIENCY BENCHMARKING OF DEPARTMENTS INCLUDING SCHOOLS, RECREATION, PLANNING & BUILDING, FINANCE AND ADMINISTRATION

CONTACT: David Cressman, City Manager
PHONE: 508 910-1813 EMAIL: cressmandg@town.dartmouth.ma.us
PROJECT COST: \$41,000

CITY OF FORT COLLINS, CO (POP. 153,000)

COMPLETE

- EFFICIENCY STUDY AND STAFFING REVIEW FOR CUSTODIAL, BUILDING MAINTENANCE DIVISIONS

CONTACT: Darrin Atteberry, City Manager
EMAIL: DATTEBERRY@fcgov.com
PROJECT COST: \$15,000

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TOWN OF HANOVER, NH (POP. 10,000)

COMPLETE

- FIRE CHIEF EXECUTIVE SEARCH
- REGIONAL, BI-STATE FIRE DEPARTMENT CONSOLIDATION

Contact: Julia Griffin, Town Manager
Phone: 603-640-3211 Email: Julia.Griffin@Hanovernh.org
PROJECT COST: \$22,500

CITY OF WALKER, MI (POP. 30,000)

COMPLETE

- PERSONNEL ASSESSMENT: PUBLIC SAFETY EMPLOYEE SALARIES & BENEFITS, JOB DESCRIPTIONS, CLASSIFICATIONS, POLICY MANUAL & REORGANIZATION

Contact: Cathy Vander Mullen, City Manager
Phone: 616-292-6566 Email: Cathy.VanderMeulen@ci.walker.mi.us
PROJECT COST: \$10,000

CITY OF PARKLAND, FL (POP. 24,083)

COMPLETE

- PERSONNEL ASSESSMENT & RECONSTRUCTION: EMPLOYEE SALARIES & BENEFITS, JOB DESCRIPTIONS, JOB CLASSIFICATIONS, POLICY MANUAL & REORGANIZATION

CONTACT: CARYN GARDNER-YOUNG, CITY MANAGER
PHONE: 954.753.5040 EMAIL: CGARDNERYOUNG@CITYOFPARKLAND.ORG
PROJECT COST: 4 CONTRACTS IN 2007, 2008, 2010 AND 2012 (TOTAL \$45,000)

CITY OF ARKANSAS CITY, KS (POP. 19,748)

COMPLETE

- COMPREHENSIVE ORGANIZATIONAL EFFECTIVENESS ASSESSMENT OF ALL DEPARTMENTS INCLUDING FLEET, FACILITIES, OPERATIONS, MAINTENANCE, PERSONNEL AND POLICIES

CONTACT: STEVE ARCHER, CITY MANAGER
PHONE: 620-441-4414 EMAIL: sarcher@arkansascityks.gov
PROJECT COST: \$35,000

CITY OF HURON, ND (POP. 11,281)

COMPLETE

- COMPREHENSIVE JOB DESCRIPTION REVISION, COMPENSATION & CLASSIFICATION & PERSONNEL POLICIES UPDATE

CONTACT: PAULLYN CAREY, FINANCE OFFICER
PHONE: 605.353.8502 EMAIL: FINANCEOFFICER@HURONSD.COM
PROJECT COST: \$22,000

CITY OF CLEARFIELD, UT (POP 28,376)

COMPLETE

- FLEET & MAINTENANCE FACILITIES EFFICIENCY STUDY

CONTACT: CHRIS HILLMAN, CITY MANAGER
PHONE: 801.940.4966 EMAIL: CHILLMAN@CLEARFIELDCITY.ORG
PROJECT COST: \$10,000

CITY OF ELKO, NV (POP 18,297)

COMPLETE

- REGIONAL COMPENSATION RESEARCH & COMPENSATION SYSTEM UPDATE

CONTACT: CURTIS CALDER, CITY MANAGER
PHONE: 775.777.7122 EMAIL: CCALDER@CI.ELKO.NV.US

UNITED STATES OFFICE

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PROJECT COST: \$10,525

CITY OF PLEASANT VIEW, UT (POP 5,632)

COMPLETE

ORGANIZATIONAL ASSESSMENT & RESTRUCTURE PLAN

- EMPLOYEE RE-CLASSIFICATION, JOB DESCRIPTION REVISION & COMPENSATION UPDATE
- PERSONNEL MANUAL REVISION

CONTACT: MAYOR DOUG CLIFFORD
PHONE: 801.389.0942 EMAIL: DCLIFFORD@PLEASANTVIEWCITY.COM
PROJECT COST: \$12,500

CITY OF DELRAY BEACH, FL (POP 64,092)

COMPLETE

- ORGANIZATIONAL EFFICIENCY ASSESSMENT: PROCESS, PERSONNEL, ASSET & FINANCE
- COMPENSATION, CLASSIFICATION, AND ORGANIZATIONAL STRUCTURE RE-ALIGNMENT.

CONTACT: DAVID HARDIN, CITY MANAGER
PHONE: 561.243.7015 E-MAIL: DHARDIN@CI.DELRAY-BEACH.FL.US
PROJECT COST: \$25,000

CITY OF DAYTONA BEACH, FL (POP 61,005)

COMPLETE

- ORGANIZATIONAL EFFICIENCY ASSESSMENT: ADMINISTRATION, FINANCE, & IT
- COMPENSATION, CLASSIFICATION, & ORGANIZATIONAL STRUCTURE RE-ALIGNMENT.

CONTACT: RICARDO KISNER, FINANCE DIRECTOR
PHONE: 386.671.8069 E-MAIL: KISNERR@CODB.US
PROJECT COST: \$25,000

CITY OF HARRISVILLE, UT (POP 61,005)

COMPLETE

- ORGANIZATIONAL ASSESSMENT & RESTRUCTURE PLAN
- COMPENSATION & CLASSIFICATION STUDY
- JOB DESCRIPTION & COMPENSATION SYSTEM UPDATE
- PERSONNEL MANUAL REVISION

CONTACT: MAYOR RICHARD HENDRIX
PHONE: 801.782.9648 EMAIL: MAYOR@CITYOFHARRISVILLE.COM
PROJECT COST: \$12,500

CITY OF PARKLAND, (POP. 24,083)

COMPLETE

- EMPLOYEE RE-CLASSIFICATION
- JOB DESCRIPTIONS & COMPENSATION SYSTEM REVISION
- PERSONNEL MANUAL REVISION

CONTACT: CARYN GARDNER-YOUNG, CITY MANAGER
PHONE: 954.753.5040 EMAIL: CGARDNERYOUNG@CITYOFPARKLAND.ORG
PROJECT COST: \$13,000

CITY OF GOODYEAR, AZ (POP 65,275)

COMPLETE

- CONDUCT ANNUAL EVALUATION OF THE CITY MANAGER
- COMPREHENSIVE COMMUNICATIONS MASTER PLAN
- FACILITATION OF 12-AGENCY PHOENIX-AREA TELECOMMUNICATIONS SUMMIT

CONTACT: MAYOR JIM CAVANAUGH & STEPHEN CLEVELAND, CITY MANAGER
JERENE WATSON, DIRECTOR OF COMMUNITY INITIATIVES
PHONE: 623.693.0005 E-MAIL: JWATSON@GOODYEARAZ.GOV
PROJECT COST: \$35,000

UNITED STATES OFFICES

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CITY OF PLEASANT GROVE, UT (POP 33,798)

COMPLETE

- ORGANIZATIONAL ASSESSMENT & RESTRUCTURE PLAN
- EMPLOYEE RE-CLASSIFICATION & COMPENSATION REVISION
- JOB DESCRIPTION & PERSONNEL MANUAL REVISION

CONTACT: GARY CLAY, ASST. CITY MANAGER / FINANCE DIR.
PHONE: 801.785.5045 EMAIL: GCLAY@PGCITY.ORG
PROJECT COST: \$8,500

VILLAGE OF TEQUESTA, FL (POP 5,273)

COMPLETE

- CITY COUNCIL ORIENTATION & PROBLEM SOLVING
- EMPLOYEE INTERVIEWS FOR DUTIES ANALYSIS & EMPLOYEE RE-CLASSIFICATION
- JOB DESCRIPTION & COMPENSATION SYSTEM REVISION

CONTACT: MIKE COUZZO, VILLAGE MANAGER
PHONE: 561.575.6204 EMAIL: MCOUZZO@TEQUESTA.ORG
PROJECT COST: \$13,000

CITY OF SCOTTSDALE, AZ (POP 278,715)*

COMPLETE

- ANNUAL PERFORMANCE EVALUATIONS FOR CITY MANAGER, ATTORNEY, CLERK, AUDITOR.

CONTACT: MAYOR MARY MANROSS OR NEAL SHEARER, ASSISTANT CITY MANAGER
PHONE: 480.312.6500 EMAIL: MMANROSS@SCOTTSDALE.GOV; NSHEARER@SCOTTSDALE.GOV
PROJECT COST: \$15,000

CITY OF COLONIAL HEIGHTS, VA (POP 7,067) *

COMPLETE

- SENIOR MANAGEMENT RETREAT (2)
- CITY MANAGER & SENIOR STAFF EXECUTIVE COACHING

CONTACT: RICHARD A. ANZOLUT JR., CITY MANAGER
PHONE: 804.520.9265 E-MAIL: ANZOLUTR@COLONIAL-HEIGHTS.COM
PROJECT COST: \$8,000

TOWN OF GUADALUPE, AZ (POP 5,258)

COMPLETE

- ORGANIZATIONAL ASSESSMENT & RESTRUCTURE PLAN
- COMPREHENSIVE PERSONNEL & COMPENSATION STUDY
- JOB DESCRIPTIONS, COMPENSATION SYSTEM UPDATE & PERSONNEL MANUAL

CONTACT: MARK JOHNSON, INTERIM CITY MANAGER / FINANCE DIR.
PHONE: 480.505.537 EMAIL: NORWAYMARK@GMAIL.COM
PROJECT COST: \$7,500

TOWN OF JUPITER ISLAND, FL (POP 679)

COMPLETE

- ORGANIZATIONAL ASSESSMENT & RESTRUCTURE PLAN
- EMPLOYEE DUTIES ANALYSIS & EMPLOYEE RE-CLASSIFICATION
- JOB DESCRIPTION REVISION, SALARY RESEARCH, RECLASSIFICATION AND RE-ALIGNMENT

CONTACT: CITY MANAGER
PHONE: 772.545.0100
PROJECT COST: \$12,000

UNITED STATES OFFICE

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CITY OF FLAGSTAFF, AZ (POP 60,611)*

COMPLETE

- COMPREHENSIVE INTERVIEWS WITH THE CITY COUNCIL USED IN FORMULATING THE ANNUAL PERFORMANCE EVALUATIONS FOR THE CITY MANAGER (2004, 2006).
- CITY MANAGER EXECUTIVE COACHING

CONTACT: JIM WINE, DEPUTY CITY MANAGER
PHONE: 928.779.7643 EMAIL: jwine@ci.flagstaff.az.us
PROJECT COST: \$8,500

CITY OF DUBLIN, OH (POP 41,751)

COMPLETE

- COMPREHENSIVE MAYOR & COUNCIL INTERVIEWS USED IN FORMULATING ANNUAL PERFORMANCE EVALUATIONS FOR THE CITY MANAGER.
- CITY COUNCIL & SENIOR MANAGEMENT PLANNING RETREAT
- ORGANIZATIONAL ASSESSMENT CLIMATE & SALARY SURVEY
- CITY MANAGER EXECUTIVE COACHING & RECRUITMENT

CONTACT: JANE BRAUTIGAM, CITY MANAGER
PHONE: 614.410.440 EMAIL: jbautigam@dublin.oh.us
PROJECT COST: \$15,000

TOWN OF FOUNTAIN HILLS, AZ (POP 24,669) *

COMPLETE

- ANNUAL GOAL SETTING RETREAT; DIRECTOR'S TEAM BUILDING & GOAL IMPLEMENTATION PLANNING RETREAT AND CITY MANAGER PERFORMANCE EVALUATIONS

CONTACT: MAYOR WALLACE NICHOLS OR TIM PICKERING, TOWN MANAGER
PHONE: 480.837.2003 EMAIL: mnichols@fh.az.gov & tpickering@fh.az.gov
PROJECT COST: \$7,000

TOWN OF QUEEN CREEK, AZ (POP 26,361) *

COMPLETE

- COMPENSATION & BENEFIT SURVEY
- TOWN COUNCIL'S ANNUAL GOAL SETTING RETREAT.
- COMPREHENSIVE INTERVIEWS AND CITY MANAGER PERFORMANCE EVALUATIONS.
- COMPREHENSIVE STRATEGIC PLAN FOR TELECOMMUNICATIONS & IMPLEMENTATION

CONTACT: CYNTHIA SEELHAMMER, TOWN MANAGER
PHONE: 480.897.9887 EMAIL: cseelhammer@queencreek.org
PROJECT COST: \$18,000

LA HABRA HEIGHTS, CA (POP 5,325)

COMPLETE

- 3-WAY CABLE FRANCHISE TRANSFER
- PROBLEM RESOLUTION WITH WIRELESS PROVIDERS
- COMPREHENSIVE PERSONNEL & COMPENSATION STUDY

* INITIAL PHASE COMPLETION

CONTACT: RON BATES, CITY MANAGER / JIM RUTH, INTERIM CITY MANAGER
PHONE: 562.694.6302 E-MAIL: jmr@la-habra-heights.org
PROJECT COST: 3 PROJECTS, \$12,300

* Some work listed performed by David Latshaw, Senior Associate

UNITED STATES OFFICES

CORPORATE PHONE: 623.207.1309 875 S. ESTRELLA PARKWAY #5038 / PO BOX 5038 GOODYEAR, ARIZONA 85338

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INTERNATIONAL

INTERNATIONAL

Afghanistan: Assessments, Change Management & Organizational Development

Kabul Municipality (pop. 5,000,000): Assessment of 16 Departments, 22 Districts, 156 Managers, 6,500 Civil Servants and \$300,000,000 facilities and assets.

Kabul Municipality (pop. 5,000,000): Process Mapping and Re-Engineering 24 Revenue & Finance functions discovering \$ millions uncollected revenue.

National Police / National Traffic Directorate: Organizational Assessment involving a facilitated a national process-mapping exercise of the national Driving License, Vehicle Registration & Customs processes which discovered \$47,109,378 in uncollected license fees, poor staff utilization, poor enforcement, poor technology and non-standardized national / regional processes.

Bangladesh: Change Management & Organizational Development

Dhaka Municipality (pop. 7,000,000) & Khulna Municipality (pop. 1,100,000): Assisting the Asian Development Bank with Organizational Assessments, Change Management and Organizational Development Plans for 23 local governments in the Dhaka and Khulna Regions before receiving \$170,000,000 new infrastructure investment.

Iraq

Baghdad: Baghdad (pop. 7,200,000) & Mosul (2,800,000): Organizational Assessments and Realignment of 15 Provincial and other Local Governments combining departments, divisions or job classifications to implement new decentralization laws and functions of budgeting, planning and legislation.

Bosnia, Myanmar (Burma), Sri Lanka, Lebanon, Libya, Tunisia:

Change Management & Capacity Building in Provincial, Regional and Local Governments.

CLIENT	FOCUS / SCOPE OF WORK	STATUS
MYANMAR - LOCAL GOVERNMENT WORKSHOPS FOR 500 PUBLIC OFFICIALS	➤ COMPREHENSIVE ORGANIZATIONAL ASSESSMENT OF +300 CITIES AND TOWNS	COMPLETED
TRINIDAD & TOBAGO - TRANSITIONING THE CADASTRAL MAPPING SYSTEM		COMPLETED
BANGLADESH LOCAL GOVERNMENT ENGINEERING DEPARTMENT (LGED)	➤ COMPREHENSIVE ORGANIZATIONAL ASSESSMENT OF 53 CITIES AND TOWNS INCLUDING FINANCE, ICT, HR, PUBLIC WORKS, POLICE & FIRE; ➤ IDENTIFY & PRIORITIZE EFFICIENT AND EFFECTIVE LOCAL GOVERNMENTS ➤ DEVELOP INSTITUTIONAL CAPACITY TO MANAGE \$170,000,000 INVESTMENT CAPITAL.	COMPLETED
CONTACT: VOLKAN COSKUN, CEO, BRISBANE CITY ENTERPRISES (BCE)		
PHONE: +61 7 3029 6692 or +61 401 345 410 EMAIL: volkan.coskun@smec.com		
PROJECT COST: \$1,235,000 (OUR PORTION \$84,000)		

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MINISTRY OF AGRICULTURE, IRRIGATION & LIVESTOCK (MAIL)

COMPLETED

- COMPREHENSIVE CAPACITY DEVELOPMENT AND CHANGE MANAGEMENT FOR 12 DIRECTORATES AND 36 PROVINCIAL OFFICES OF MORE THAN 6,000 CIVIL SERVANTS

CONTACT: BRIAN RUDERT, CHIEF OF PARTY, USAID, USDA AND ICMA INTERNATIONAL
PHONE: Kabul +93 (0) 793570551
EMAIL: BRUDERT@CBCMP.ORG
PROJECT COST: \$35,000,000 (OUR PORTION \$46,000)

MINISTRY OF LABOR, SOCIAL AFFAIRS, MARTYRS & DISABLED (MOLSAMD)

COMPLETED

- DEVELOPMENT OF THE STRATEGIC PLANNING OF PERSONNEL AND RESOURCES; DEVELOPMENT OF THE NATIONAL & REGIONAL PERFORMANCE MANAGEMENT STANDARDS

CONTACT: DREW GILMORE, DIRECTOR, AFGHAN TECHNICAL ASSISTANCE PROGRAM (ATAP)
PHONE: Ottawa +1 613-963-0368 Kabul +93 77 849 7824
EMAIL: DREW.GILMOUR@CANADEM.CA
PROJECT COST: \$125,000,000 (OUR PORTION \$40,000)

MINISTRY OF FINANCE / NATIONAL TRAFFIC DIRECTORATE

COMPLETED

- COMPREHENSIVE ORGANIZATIONAL ASSESSMENT OF INSTITUTIONAL SYSTEMS, TOOLS, PROCESSES,; PROCESS MAPPING & STRATEGIC PLANNING OF PERSONNEL AND RESOURCES

CONTACT: DREW GILMORE, DIRECTOR, AFGHAN TECHNICAL ASSISTANCE PROGRAM (ATAP)
PHONE: Ottawa +1 613-963-0368 Kabul +93 77 849 7824
EMAIL: DREW.GILMOUR@CANADEM.CA
PROJECT COST: \$125,000,000 (OUR PORTION \$40,000)

KABUL MUNICIPAL GOVERNMENT (AFGHANISTAN)

COMPLETED

- COMPREHENSIVE PROCESS-MAPPING OF 24 FINANCE & REVENUE FUNCTIONS
FACILITATED 7 WORKSHOPS WITH 150 MANAGERS IN 16 DEPARTMENTS & 22 DISTRICTS

CONTACT: JON LLEWELLYN / RICHARD DAY - ADAM SMITH INTERNATIONAL
EMAIL: JON@TERAQUAD.CO.UK AND RICHARD.DAY@ASL.ORG.AF
PROJECT COST: \$125,000,000 (OUR PORTION \$120,000)

KABUL MUNICIPAL GOVERNMENT (AFGHANISTAN)

COMPLETED

- 3-MONTH COMPREHENSIVE ORGANIZATIONAL ASSESSMENT OF INSTITUTIONAL SYSTEMS, TOOLS, PROCESSES, PROCEDURES AND MANAGEMENT CAPACITY

CONTACT: PETER CLAVELLE, CHIEF OF PARTY, TETRA TECH / ARD
PHONE: 802.658.3890
EMAIL: PCLAVELLE@TETRATECH.COM
PROJECT COST: \$125,000,000 (OUR PORTION \$60,000)

15 PROVINCIAL (STATE) GOVERNMENTS (IRAQ)

COMPLETED

- ORGANIZATION ASSESSMENTS OF MORE THAN 250 DEPARTMENTS, 15 PROVINCES;
- PROCESS-MAPPING OF FINANCE, PLANNING, LEGISLATING OF 105 DEPARTMENTS;
- STAFFING GAP ANALYSIS OF MORE THAN 10,000 PUBLIC EMPLOYEES (CIVIL SERVANTS)

CONTACT: AL HAINES, FORMER CHIEF OF PARTY (COP)
EMAIL: HAINES3AE@HOTMAIL.COM
PROJECT COST: \$250,000,000 (OUR PORTION \$192,000)

UNITED STATES OFFICES

CORPORATE PHONE: 623.207.1309 875 S. ESTRELLA PARKWAY #5038 / PO BOX 5038 GOODYEAR, ARIZONA 85338

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EXECUTIVE SUMMARY

WHY AN OPERATIONS AUDIT?

All public agencies face challenges associated with the P-Issues: *People, Planning, Policies, Processes, Procedures and Paperwork*. Because public agencies are dynamic organizations, and change over time, departments can become overwhelmed, understaffed, and inefficient. What worked last year might not be most effective, efficient or sustainable today.

To successfully identify and remedy various organizational issues, risks and liabilities, organizational development consultants must have the experience necessary to examine a public agency comprehensively – from a 30,000-foot level – while also possessing the expertise necessary to examine individual departmental operations. If initiated and completed effectively, Operations Audits can improve organizational culture, reduce liabilities, and improving service quality.

PURPOSES

While they are also called by different names including Performance Audits, Efficiency Studies or Organizational Reviews, Operations Audits all have the same general purposes:

- ✓ *to effectively identify the potential for waste and fraud,*
- ✓ *to attain greater efficiency and innovation,*
- ✓ *to minimize the negative impacts that reduced revenues can have on organization,*
- ✓ *to identify ways to improve organizational culture, service quality, and efficiency, and*
- ✓ *to strengthen the foundation of the organization, and*
- ✓ *to provide the departments with an implementation roadmap for the future.*

AUDIT AREAS

Audit areas generally include:

- Functions: *Service Delivery & Processes*
- Structure: *Organizational Structure / Management Accountability & Alternatives*
- Resources: *Management / Use (Personnel, Technology, Physical Facilities)*
- Collaboration / Privatization: *Public Partnerships, Mutual Aid and Outsourcing, and*
- Rules, Policies, and Procedures: *Accounting, Budget, Procurement, Purchasing*
- Compliance: *Legal & Litigation, Statutory Requirements*
- Risk Analysis: *Cash Management, Fixed Assets, Fraud Vulnerabilities, Insurance & Bonding Compliance*

Audit areas are discussed in detail in the work plan below.

BENEFITS

Benefits of an Operations Audit include:

- ✓ Validation of Best Practices
- ✓ Minimization of Fraud, Legal Risks & Waste
- ✓ Efficient use of Assets, Personnel & Technology
- ✓ Independent verification of Cost Savings potential
- ✓ Discovery of Alternative Revenues
- ✓ Increased Revenue Collection,
- ✓ Increased cost savings
- ✓ Realignment / redistribution of expenses
- ✓ Process & Service Quality Improvement (streamlining)
- ✓ Increased trust in elected and appointed public officials.

PROJECT TIMING

Like many local governments, meeting citizen expectations is a constant challenge for the City of Beachwood. Demands for service improvement and expansion continue despite budget and finance limitations and a slow-growing economy. As the City is also experiencing high turnover of employees and pressure from increasing deferred maintenance and capital investment costs, these conditions create an imperative to evaluate and realign the City's functions, structure and staffing.

This current situation also provides a unique opportunity to re-examine services they are providing, the levels of service, and the internal systems, tools and processes which may not be as efficient or effective as possible. While government operates under different constraints than the private sector, government can, and should, in large measure, become much more efficient and effective in delivering services to its resident, tax-paying public.

PROJECT OVERVIEW

Consultants will conduct a comprehensive examination of the City's personnel, policies, practices, processes and procedures. This "***Operations Audit & Management Plan***" will determine:

1. *whether the City is acquiring, protecting, and using its resources (such as personnel, property, and space) as economically and efficiently as possible,*
2. *the causes of inefficiencies or uneconomical practices, and*
3. *whether the City has complied with laws and regulations or matters of economy and efficiency.*

While it will be written to be easily understood by various audiences - including media, elected officials, department staff and the general public, the Final Report is to be written with the express purpose of being implemented by the employees. For implementation to

be most effective, participation by department staff will be highly encouraged and necessary. Consultant methods and draft scope of work are included below.

SCOPE OF WORK

DIVISIONS, FUNCTIONS & OFFICES EXAMINED

The following departments / divisions / functions are to be examined (**BOLD BLACK**):

Building	<i>Building Permits & Inspections, Code Enforcement / Property Maintenance, Planning / Preservation/Zoning.</i>
City Administration	<i>City Council, City Manager, Mayor's Office, City Clerk, Solicitors (City Attorney's) & Public Information.</i>
Community Services	<i>Recreation, Human Services, Communications</i>
Economic Development	<i>Business Attraction, Business Retention</i>
Finance	<i>Accounting, Accounts Payable, Personnel / Human Resources, Information Technology, Payroll, Purchasing & Treasury.</i>
Public Safety	<u><i>Safety Director</i></u> <u><i>Police: Traffic, Courts & Patrol.</i></u> <u><i>Fire: Fire / Rescue & Fire Prevention.</i></u>
Law	<i>Not at this time.</i>
Audit	<i>Not at this time</i>
Public Services	Building Maintenance, Engineering, Field Operations, Parks & Public Facilities, Streets – Sidewalks – Medians - City Entrances, Utilities & Vehicle Maintenance, Sewers, Snow Removal, Solid Waste / Recycling, Also: Analytics / Business Analysis, Asset & Fleet Management, Contracts for Services, Operations Compliance, Organizational Structure, Risk Management, Staffing, Partnerships, Outsourcing & Privatization.

EVALUATION TEAM PHILOSOPHIES

1. The City Council is compelled by staff vacancies, economic / financial circumstances and to take a closer look at municipal operations to identify opportunities for greater institutional efficiency and service delivery, ways to reduce municipal operational expenses while retaining high-quality employees.

2. The Mayor has the desire and responsibility to maintain organizational effectiveness by attracting and retaining high-quality employees. In light current fiscal and economic constraints, the new Mayor will greatly benefit from the results of this assessment.
3. Employee input is a critical part of the process. Management and line / field staff will be actively involved in the interactions with consultants for two reasons:
 - (1) consultants are to be resources for staff, and
 - (2) employee participation is necessary for successful implementation and sustainability of the findings.
4. High-level to ground-level. A comprehensive, high-level examination of the City's operations will be critical to effectively identify thematic or systemic problems within the organization. A ground-level analysis will further examine ways to reduce the cost of operations within all departments, increase service quality, and organizational efficiency, effectiveness and sustainability.
5. Implementation Roadmap. An implementation roadmap will enable staff to successfully implement achievable short and long-term efficiencies.

METHODOLOGIES

Various methodologies are used to gather and analyze data, enabling the development of specific conclusions and recommendations. These methodologies include:

- *Review of completed master plans for the utility and enterprise funds.*
- *Review of staff-provided materials.*
- *Review of department generated analysis and reports.*
- *Review of state and local statutes as well as departmental and City-wide policies.*
- *Interviews, discussion and conversations with management and non-management employees to better understand overall department operation, functions, policies, etc.*
- *Examination of departmental infrastructure.*
- *Examination of departmental records.*

OBJECTIVES (REDUNDANT...SEE BELOW)

- Explore the Department's needs, skills, processes, resources and priorities to determine how refinement or improvement to operational efficiency (time), expenditures (costs), and revenue generation can be realized during the upcoming 2017 & 2018 Fiscal Years.
- Examine the Department's Functions; evaluate the Form or Structure of each department to determine whether it is optimal towards fulfillment of the department and City-wide goals, objectives and priorities; and determine whether the current Resources (personnel, technology and physical assets) are being used efficiently.

- Determine optimization alternatives to the Department's Functions, Forms / Structure, and Resources.
- Determine if, where and why internal stop-gaps are failing and how they can be remedied.
- Determine and quantify the most effective strategy for the Department, to accomplish its organizational objectives.
- Determine the most effective means for reducing the cost of operations while improving service delivery and service quality.
- Establish the basis for internal assessments, controls, monitoring, and reporting for perpetual organizational improvement to these ends.
- To strengthen the foundation of the organization.
- To provide the Department with an implementation roadmap for the future.

LETTER OF ENGAGEMENT AND SCOPE OF WORK

THIS AGREEMENT IS MADE THIS _____ DAY OF _____, 2018,
BETWEEN THE CITY OF BEACHWOOD, OH, (CITY) AND MUNICIPAL SOLUTIONS, LLC. (CONSULTANT)

1. OBJECTIVES OF THIS PROJECT

Municipal Solutions shall address the following Objectives:

- Explore each department's needs, skills, processes, resources and priorities to determine how refinement or improvement to operational efficiency (time), expenditures (costs), and revenue generation can be realized during the upcoming 2018 & 2019 Fiscal Years.
- Examine the department's Functions; evaluate the Form or Structure of the Service department to determine whether it is optimal towards fulfillment of the department and City-wide goals, objectives and priorities; and determine whether the current Resources (personnel, technology and physical assets) are being used efficiently.
- Determine optimization alternatives to the organization's Functions, Forms / Structure, and Resources.
- Determine if, where and why internal stop-gaps are failing and how they can be remedied.
- Determine and quantify the most effective strategy for each department, to accomplish their organizational objectives.
- Determine the most effective means for reducing the cost of operations while improving service delivery and service quality.
- Establish the basis for internal assessments, controls, monitoring, and reporting for perpetual organizational improvement to these ends.
- Strengthen the foundation of the organization.
- Provide the departments with an implementation roadmap for the future.

Note: Specific emphasis is to be made to address

- **Public Services**—namely: Building Maintenance, Engineering, Field Operations, Parks & Public Facilities, Streets/Sidewalks/Medians/City Entrances, Utilities & Vehicle Maintenance, Sewers, Snow Removal, Solid Waste / Recycling,
- **Analytics / Business Analysis, Asset & Fleet Management, Contracts for Services, Operations Compliance, Organizational Structure, Risk Management, Staffing, Partnerships, Outsourcing & Privatization.**

Note: Other departments added at the City's request.

2. WORK PLAN

ORGANIZATIONAL ASSESSMENT

The Organizational Assessment process is universal in its application within the organization. The Organizational Enhancement concept **requires discussion among consultants and employees** to develop a knowledge of and familiarity with each of the City's department's, services, FUNCTIONS; to how effective the ORGANIZATIONAL STRUCTURE in distributing responsibilities in performance of key functions, and whether its physical and STAFFING resources are being efficiently utilized to realize significant cost savings and service quality improvement. Below is a complete overview of the Organizational Assessment process to empower city management to maximize the citizen's return on investment.

PHASE 1: PRE-ASSESSMENT

1. Objective: Discovery and Orientation

a. Discovery:

- Gather a variety of information from City staff necessary to begin familiarization of the City's systems, tools and processes.
- Design and administer a Customer Service Survey to residents of the community to obtain feedback regarding awareness, perceptions and quality of service received.

- ###### b. Kickoff Meeting: Prepare orientation materials for a 'kick-off' meeting / discussion with Department Managers regarding principals of *efficiency, effectiveness and sustainable innovation* – and what they mean from various organizational perspectives (City Administration, Department Supervisors and Line / Field Staff as determined necessary). Discussion regarding the results of the Customer Service Survey. Discussion regarding how innovation could translate into measurable cost savings and improve quality of service. Discuss the principles of *change, efficiency, effectiveness and sustainability* and how this Assessment aims to reduce cost of operations, and improve quality of service. Brief discussion on the objectives of our work, timelines and outcomes. Discussion on the project scope of work and the range of potential outcomes (*organizational changes to functional duties, reorganization, and possibly reassignment, but also changes in policies, procedures, paperwork, and planning*).

PHASE 2: ASSESSMENT

1. **Objective:** Consultants shall comprehensively examine the City's departments and identify essential Service Area Functions, the Form or Structure currently being used to carry out its intended objectives, and evaluate whether Function, Form or personnel and other physical Resources are optimal in reducing the cost of operations. Determine where significant cost-savings can be realized both short-term and in perpetuity, and provide a high-level evaluation with fairly detailed recommendations including changes to policy, technology, reorganization, reassignment, service level changes, mutual aid and more efficient use of all resources. Departments and related functions to be examined include:

- a. *Public Services—namely: Building Maintenance, Engineering, Field Operations, Parks & Public Facilities, Streets/Sidewalks/Medians/City Entrances, Utilities & Vehicle Maintenance, Sewers, Snow Removal, Solid Waste / Recycling,*
- b. *Analytics / Business Analysis, Asset & Fleet Management, Contracts for Services, Operations Compliance, Organizational Structure, Risk Management, Staffing, Partnerships, Outsourcing & Privatization.*

- a. **Function: Service Delivery & Processes**

Municipal Solutions shall evaluate principal areas of department functions, what services they provide (internal and external), and how current processes deliver those services. Examine rate-based revenues, user fees, and tax-generated revenues for legal and prudent ways to redistribute costs for services and operational expenses.

- b. **Organizational Structure / Management Alternatives:**

Consultants shall evaluate how the organizational structure within the department and among departments might be more efficient in addressing current services and other services of the City. Such reorganization might include combining or separation of functions, sharing of resources, and / or the reassignment of personnel. **Organizational Structure** – *Examine existing system-wide organizational structure, and make recommendations for expansion or consolidation of services and departments.*

Consultants will Analyze the staffing requirements and existing positions; Determine the following concerning existing staff positions; *Is there a*

sufficient number of positions to adequately perform the City's services safely, efficiently and effectively? Are staff performing tasks efficiently, effectively, and economically or can positions be consolidated or eliminated? Identify controlling personnel policies and determine level of compliance by existing personnel and management; Evaluate hiring standards; Review payroll procedures; Compare salaries and benefits with other departments with the City government and other neighboring governmental entities that perform essentially the same employment duties and have similar job descriptions; Determine if best management practices are utilized to supervise personnel; Evaluate personnel training programs; Make recommendations to correct deficiencies discovered in personnel analysis.

c. Resources: Management / Use (Personnel, Technology, Physical Facilities)

Consultants will evaluate the department's current Personnel, Technology and Physical Facilities to determine a greater efficiency than is currently realized. Consider the reassignment of personnel, more efficient use of physical facilities, and better use of technologies to improve efficiency and service delivery. *Report will include the current and potential use of Best Available Technologies (BAT) to ensure the most efficient installation of equipment and effective operation of the City departments and functions.* Recommend the installation, removal or replacement of equipment or programs to meet organizational financial and service delivery goals. Consider the benefits and cost savings of Electronic government (E-Gov) services which provide greater access for residents and businesses to municipal services while providing more efficient process management for staff and cost savings to the organization.

Consultants will evaluate City data processing and technology assets: Identify and inventory system-wide data processing assets; Evaluate efficiency and adequacy of existing assets; Determine system-wide needs for data processing and service personnel, equipment, hardware, software; Identify safety and security concerns; Evaluate records storage concerns, space and alternatives; Make recommendations for staffing levels and needed data processing equipment; Determine if system-wide data processing functions are being duplicated by other City departments, and if so, would it be practical and cost effective to consolidate these functions; and Project cost estimates for system-wide needs for the next five (5), ten (10), fifteen (15), and twenty (20) years.

d. Public Partnerships, Mutual Aid and Outsourcing:

Consultants will evaluate the potential for Mutual-Aid Agreements with other public institutions, including the County, School Districts, Special Districts or other government agencies in addressing services, technology or

personnel towards performance improvement and / or cost-sharing of similar operations or maintenance expenses. Examine the potential for Outsourcing certain functions or services to private institutions including the potential of privatization of services and fee-based contracts.

e. Rules, Policies, and Procedures:

Consultants will evaluate all internal rules, policies, and procedures for compliance, adequacy, and effectiveness, and evaluate existing system-wide operational policies for effectiveness, adequacy, and functionality by identifying existing operational policies and standards of performance; measuring performance and compliance with existing operational policies and standards; reviewing effectiveness, adequacy and practical functionality of operational policies; establishing benchmark governmental operational policy standards; comparing and contrasting established benchmark policy standards with current operational policy standards; making recommendations to correct deficiencies discovered; and identifying existing operational policies and programs that are efficient and effective.

f. Compliance: Legal & Litigation, Statutory Requirements

g. Risk Analysis: Cash Management, Fixed Assets, Fraud Vulnerabilities, Insurance & Bonding Compliance

PHASE 3: PRELIMINARY REPORT

Organizational Assessment (Preliminary Report) reporting the status of interim findings and observations. These reports are generally of an interim basis, meaning, they are part of an incomplete work product requiring further, discussion, validation and clarification.

PHASE 4: FINAL REPORT

Organizational Assessment & Management Plan (Final Report) will present validation of current best practices in use, illustration of potential problems or concerns, and identification of alternatives and cost-benefit analysis that can be implemented strategically. The Final Report is generally put in terms that a lay-person could easily understand & move forward after reading, but contains enough detail to permit the technician in his / her field of expertise to implement effectively. Final Report will be comprehensive in nature – covering all department services. Solutions will be as specific and detailed as possible.

PHASE 5: PRESENTATIONS & TRAINING

Presentations & Training. We will present to the City Council and work with staff in additional training as needed based on the outcome of the Assessment & Final Report recommendations.

3. DELIVERABLES & TIMING

Element	Deliverable	Timing
I	Pre-assessment	Immediate upon contract execution.
II	On-site Kick-off Meeting, Department Tours & Interviews	30 days from execution of contract (or sooner if requested).
III	Preliminary Report (draft working document)	45 days from execution of contract (or sooner if requested).
IV	Final Report	45 days from Preliminary Report (or sooner if requested)
V	Presentations to Staff, City Council.	As necessary. Communication w/ the Media as approved, prudent & useful

Consultant will provide seven (7) printed and bound copies of the Final Report, and will provide electronic copies of all written materials, research, spreadsheets, data and final products on three (3) CDs – all in Microsoft Office format or any other format preferred. Additional printed or electronic copies can be provided as requested. City will provide consultant access to on-site facilities including use of printing equipment and supplies while on-site to reduce reimbursable costs for the project. Copies of final report will be professionally bound

4. RATES

Municipal Solutions' rates are structured one of three ways: Project-based, Hourly Rate-based, or Reduced Hourly Rate-based. For purposes of this assignment, a **not to exceed amount of \$26,400 plus expenses** is proposed below. Price includes expenses.

Phase / Activity	Description	Cost
I. Pre-assessment	Administration of Customer Service Survey & Report; gather, disseminate and review electronic and paper documents from City staff; meeting preparation.	\$5,500
II. Assessment	Kick-off meeting with department staff;	\$8,800

	<i>Presentation of Survey results; 3-days onsite (interviews, data collection & validation)</i>	
III. Preliminary Report	<i>Consultant team collaboration (on-site) and assemblage of the report (off-site).</i>	\$5,000
IV. Final Report	<i>Consultant team gathers last information for completion of revisions / edits of Final Report.</i>	\$4,600
V. Presentation & Workshop	<i>Consultant team presentation to City Council and workshop for discussion and implementation strategy.</i>	\$2,500
Expenses	<i>2 consultants x 6-days onsite + lodging & transportation; copies of report</i>	\$3,500
Total:		\$29,900

Because Municipal Solutions, llc consultants are specialists and practitioners in various fields and professions, retaining the best, but affordable team members is essential to the success of this project. We are responsible for ensuring that our findings are based on fact, and defensible in court (if ever necessary). That is our standard.

Included travel expenses are generally included in the overall project cost. We generally anticipate 2 consultants onsite for 3 days + round-trip airfare and IRS-standard per diem food and lodging. *If the client requires additional meetings, return visits, significant revisions to written documents or is responsible for delays, consultant will remain as flexible with time and additional expense as possible, however if any additional expense might incur, consultant will notify the City immediately to discuss and / or obtain approval for additional work, time or expense*

Invoices are also itemized including time and expense. Internal project status worksheets are kept by the Consultant to ensure all projects do not exceed the amount contracted. Unless otherwise stated in this agreement, clients are billed in 'progress payments' payable within 15 days of invoice date. Invoices will not be itemized. This project will be billed as follows:

- 25% due within 15 business days of the execution of this agreement.
- 35% due within 15 days of submittal of Preliminary Report.
- 40% due within 15 business days of submittal of the Final Report.

ADDITIONAL WORK*

Although we are available to provide you with municipal consulting services, we are not obligated to venture beyond the terms of this agreement in writing. Municipal Solutions is also willing to provide the following services – including implementation as requested:

- Additional Departments as requested and pre-approved
- Change Management Facilitated workshops
- Customer Service Audit
- Customer Service Training
- Enterprise Fund Recovery & Policy Revision

- F. Implementation of recommended improvements
- G. Process mapping
- H. Compensation, review / revision of job classifications and descriptions
- I. Personnel policy manual revision.
- J. Bid Specifications / Document Preparation, Vendor Evaluation / Selection and Contract Administration
- K. Preparing & Securing Inter-government / Inter-agency Agreements
- A. Administration of Contracts or Agreements
- B. Strategic Planning of Annual Goals & Policies
- C. Specific Skills Training

The Hourly Rate or Project Rate or any additional work not supplied in the initial agreement will be determined at the appropriate time and included in any additional amendments by written change order. All supplies related to all elements including publication of documents, are included as are the use of municipal supplies, telephone and photocopying equipment by Consultant Team Members is approved while on-site as is appropriate to offset additional expenses.

Additional work will be approved in writing and billed at the reduced hourly rate or project rate to be determined.

5. COMPANY REPRESENTATION; CITY REPRESENTATION; MISCELLANEOUS:

The City should rely on advice from our organization, however, we prefer to fully review and report our recommendations and results in writing to the City of Beachwood. This Agreement contains the entire agreement of the parties and this agreement may be amended in writing. Unexpected or changing circumstances may be encountered during the engagement, therefore, changes may be necessary, by the request of either party, without revision to the terms of this Agreement, though it is also understood that changes should be reduced to writing. Client also understands that many of our consultants are practitioners in other public agencies, which will require some flexibility in scheduling arrangements, adjustments of deadlines and substitution of consultants (if necessary).

Municipal Solutions cannot provide an assurance that a 'perfect' product will be rendered. However, all efforts will be made to ensure the best product possible for the client. Circumstances may arise in which it is necessary for us to modify our efforts or withdraw from the engagement. To mitigate the effects of such circumstances, the findings or reasons for concern, modification or withdrawal will be communicated clearly by each agent of this agreement, and reduced to writing as often as possible. Both parties agree to work in good faith to avoid any delay or premature termination in the relationship.

The City has the ultimate responsibility for identifying a project manager or contact for the course of this project, and outlining necessary outcomes of this agreement. The Consultant has the responsibility of providing timely and accurate information, communications, and the results in fulfilling the established objectives and tasks of this agreement. This responsibility includes the maintenance of adequate records and internal controls and the safeguarding of accomplished tasks. Our agreement cannot be relied upon to disclose every problem in the relationship; however, both parties agree to notify each other immediately if any such matters come to one or the other's attention. We have confidence that the relationship will greatly benefit both parties.

The City agrees that all records, documentation, and information in its possession in connection with our engagement will be made available to us, and Consultant agrees that all records, documentation, and information in our possession in connection with our engagement will be disclosed one to another, and that consultant will have the full cooperation of the City's personnel, under the direction of its Principal, for the efficient and effective completion of the requested services.

Both parties agree that the City shall own any document, record, product or information created by the parties under this Letter of Engagement. The City shall not have to pay any party for the use or continued use of any document created under this Letter of Engagement, and the City shall not prohibit Consultant from use of any product from this engagement for marketing, promotional and sales purposes.

As required by generally accepted standards, both parties will make specific inquiries into various organizations to whom a relationship exists or may eventually exist. If the responses to our inquiries, the oral and representations, and results of our efforts somehow appear to compromise our relationship, both parties agree to first try to resolve the relationship together without resulting to litigation. If both parties are unable to resolve the dispute, then either party shall be allowed to pursue litigation to resolve the dispute. Any litigation shall be brought in the Superior Court of Maricopa County in the State of Arizona, which shall have exclusive venue for any matter arising out of this Letter of Engagement. This Agreement shall be governed by the Laws of the State of Arizona.

Both parties acknowledge that this Letter of Engagement is subject to the conflict of interest provisions set forth in as amended and statutes in the State of Ohio.

6. INSURANCE

Municipal Solutions, llc maintains current liability, automotive and workers compensation insurance.

1. \$1/\$2 Million Commercial Comprehensive, E & O and Automotive Liability policy through The Hartford, and
2. Workers Compensation Insurance as required by law in the State of Arizona.

7. TERMINATION

This Agreement may be terminated with or without cause upon 15 calendar days notice to the other. The amount due Consultant on termination shall be a payment to Consultant that reflects the total payment due on the completed agreement minus the sum that reflects a pro-rata daily computation of the amount remaining to be paid on the agreement based on promised delivery dates commencing from the termination date. The City shall be entitled to all work sheets and products prepared up to the termination date.

Notices will be sufficient if emailed and mailed to the following persons:

Martin S. Horowitz, Mayor
City of Beachwood, OH
25325 Fairmount Blvd.
Beachwood, OH 44122
Mayor@beachwoodohio.com

David A. Evertsen, Principal
Municipal Solutions, LLC
P.O. Box 5038
Goodyear, AZ 85338
devertsen@municipalsolutions.org

8. ACCEPTANCE

By: _____

Martin S. Horowitz, Mayor
Representing: City of Beachwood, OH
Date:

By: _____

David A. Evertsen, Principal
Representing: Municipal Solutions, LLC
Date:

Approved as to Form

By: _____
Date:

Exhibit A – List of Documents and Materials for Pre-Assessment

A project of this scope mandates full cooperation of all participating agencies and internal departments, including Finance, City Clerk, IT, etc., and especially the cooperation of the agencies that will potentially be affected by the integration: Human Resources, Information Technology, and Purchasing.

During the Pre-assessment phase, department staff will be provided a list of documents, details and data which will be needed by the consultants. Documents which may be requested include (but are not limited to) the following:

Staff Contact Information

- Internal Telephone and Email list.

Rules, Policies & Procedures

- Personnel Manual/Policies and Procedures, including purchasing, vehicle use, customer service, operational policies, etc.
- Commission/Management goals and priorities, as previously approved for last three years.

Cooperative Service Agreements

- Agreements with or between other government agencies for sharing of services (may include purchasing, service delivery, resource sharing, etc)

Organizational Structure/Personnel

- Current Organizational Chart including all classified positions in all departments, divisions, boards & commissions (include Enterprise Funds).
- Total Personnel by department current and last five (5) years.
- Current Employee Classification System, including pay grades and ranges for positions, employees by classification and their current pay grades and ranges.
- Copies of Job Descriptions for all classified positions.

Accounting, Budget, Finance, Revenue & Expenditure Analysis:

- Most recent Bond Prospectus.
- Most recent annual Audit report.
- Operating Budgets for Fiscal Year and previous two years. Include any special revenue or enterprise funds.
- Capital Improvements Program (5 year if available).
- Copy of IT or Technology Plans spanning the last 5 years.
- Lists of fixed assets / capital facilities / municipal property / all vehicles.
- List of Service Contracts with private service providers including software licenses, maintenance agreements, printer / copier leases, mobile phone plans, etc. Actual documents can be inspected onsite as needed.

- List of any Mutual-aid Agreements with other government agencies, special districts, school districts.
- Map of the City illustrating locations of all public buildings, public property that does or will have computers and telephones.
- List of grants received and currently managed by the City.
- Copies of Development Agreements and Franchise Agreements made within the past 10 years.

General Information:

- Prepared public information regarding local economics, demographics, and statistics.

Much of this information will be required for us prior to our onsite work.

When we begin our onsite work, a whiteboard session will require key department personnel in attendance, one-on-one interviews over two days and follow-up/Q&A by email and/or telephone over the term of the project.

During our onsite work, we will need use of a conference room, a work space for three/meeting space for two days, access to a network printer, photo copier, Internet access, and telephone while onsite.

Equipment / Space Needed:

- Dedicated work space for both days (i.e. conference room with space for 8-10).
- Individual 'meeting' spaces in each department or division for sit-down or face-to-face meetings (i.e. space for 3-4).
- Internet access for web research and email correspondence (send and receive capability).
- Temporary read-only access to 'shared' network databases for document retrieval and review. Ability to log on to the terminal server through the Internet or network connection to get to your intranet.
- Use of Printer, Photocopier and telephone equipment while on-site.



Project Study Area (including geographic boundaries)*

The project area includes property located in both the cities of Beachwood and Lyndhurst. On the Beachwood side, the pedestrian bridge would be located on property owned by Brookfield Property Partners (Beachwood Place mall), and on the Lyndhurst side access is located on Cleveland Metroparks property (Acacia reservation). The Cuyahoga County Planning Commission recommended implementing the pedestrian bridge as part of Beachwood's 2015 Master Plan.

Detailed Project Description

Our goal is to collaborate with regional partners to install a pedestrian bridge taking users over Cedar Road from the Acacia Reservation owned by the Cleveland Metroparks, to property located at Beachwood Place mall. A multitude of users would be able to more easily access the two sites, including residents of nearby eldercare facilities including Menorah Park, Montefiore, and the Weils, apartment complexes and other multi-unit housing including Four Seasons, the Hamptons, and the Village, visitors to the Cleveland Clinic Health Center, and Lyndhurst residents. The population of census tract 1311.04 abutting the mall property, totals 4,333 with over 48% of age 65 and older. Residents in Lyndhurst census tract 1702.01 about the Acacia reservation and total just under 2,100. In this area the age ranges are more diverse with many young families and children present (41% ages 25-59).

The bridge would allow for not only a safer method of transport, but also greater excitement. Creating a unique access to Acacia's 155 acres via the pedestrian bridge would create an experience unlike most others in this area, allowing for greater enjoyment of the Euclid Creek as well.

As Beachwood Place mall prepares to evolve and embark upon mixed-use development, this project would encourage greater inter-modal transportation uses at this side of Cedar Road (RTA stops) and bring more foot and bicycle traffic to the property. The bus stops here are critical components for not only workers at the mall, but employees at the neighboring healthcare facilities.

Proposed Study Components Description

Cedar Road is a 5-lane thoroughfare and can be extremely dangerous for pedestrians and cyclists to navigate. According to ODOT's 2013 daily traffic count, the exit at Cedar and I-271 tracks a daily vehicular count of 97,670 and Richmond Road at Cedar Road tracks a daily count of 18,220. In 2017, on the stretch of Cedar between 271 and Richmond Road ODOT recorded 30 traffic accidents, 1/3 of which were between Richmond and George Zeiger Drive. The City is also interested in understanding the feasibility of bike lanes on Richmond Road, with intent to give even more users safe access to traverse the area. This would in turn lead to reduced pollution and use of fossil fuels, as well as, greater health and wellness for citizens. There is no dedicated pedestrian entry to Acacia from Cedar, and vehicular traffic is routed up the steep incline.

Installing the bridge over Cedar and connecting directly into the higher topography of both the mall and the Metroparks increases the ease of access.

1. Adding a pedestrian bridge over Cedar from the property at Beachwood Place mall to Acacia Reservation provides a travel option that currently does not exist. This would open up recreational opportunities for residents to the south side of Cedar since there are no public green spaces between Cedar and Shaker Blvd to the east of Richmond Road. This also opens up shopping/destination opportunities for residents of Lyndhurst who are most likely only visiting the mall by car.
2. n/a
3. Brookfield Property Partners is undergoing discussions to make a substantial investment in the evolution of the mall property. The zoning code is currently being revised to make way for mixed-use development. The addition of a pedestrian bridge over Cedar Road into the Metroparks would complement a residential and/or hotel project near the intersection of Cedar Road and George Zeiger Drive. Shoppers, diners, residents, and visitors alike would enjoy the unique experience of crossing the bridge over Cedar Road to arrive at their destination. With the potential to add one or more bike sharing racks at the site, visitors from outside of the area could enjoy the experience without having brought their own bicycle and could cycle back and forth connecting Beachwood Place and Legacy Village catalyzing spending in both locations.
4. Both bus lines 32 and 94 run through the area along Cedar Road between Richmond Road and George Zeiger Drive. There are five stops on the south side of Cedar Road, two on the north side, and six along George Zeiger Drive. Average boarding per day heading west or north is 90 riders, and the average alighting heading east and south per day is 127. Allowing a safer and faster channel over Cedar Road would increase the accessibility of intermodal transportation options available to transit passengers.
5. Multiple community partners are collaborating in favor of a pedestrian bridge over Cedar Road. We have attached letters of support from the City of Lyndhurst, the Cleveland Metroparks, and Beachwood Place mall. Menorah Park, Montefiore, and the Cleveland Clinic health center also hope to see the project come to fruition since it will provide greater health and wellness opportunities for their residents, patients, and visitors.

Project Administration

If granted the TLCI grant for planning process, the sponsor will adhere to the recommendations provided by NOACA. If the planning process proves feasibility for the pedestrian bridge, the sponsor will formulate a team of collaborating partners and stakeholders to ensure all concerns are addressed and all opportunities for additional connectivity are examined. The City of Beachwood has experience in implementing strategies recommended by our 2015 Master Plan including the hiring of a Retention Specialist, the establishment of Beachwood's first Community Reinvestment Area, and updating the zoning code to encourage mixed-use development.

CITY OF *Beachwood*
INTEROFFICE MEMORANDUM

TO: Brian Linick, Council President
Members of City Council

FROM: Tina M. Turick, Assistant Administrative Officer 

DATE: October 4, 2018 – **Amended October 12, 2018**

SUBJECT: Agenda Request - Recreation Fees Proposed Changes

Every year the City takes a look at our Recreation Fee schedule to determine whether increases are necessary. The Mayor, Law Director, Finance Director, Recreation Director, Recreation Supervisor and I recently met to review our fees. The proposed changes are a result of those discussions.

Attached you will find a draft ordinance outlining the proposed changes and below is a summary of same:

- Pool Fees – modest increases
 - General Admission Fees, Birthday Party Rates, and Private Lessons
- Camp Fees – 10% increases
 - Similar to the security arrangements currently in place for the schools, the City intends to assign part-time officer(s) to buildings during camps
 - **Update: Increased an additional \$10 to cover expense of having a nurse**
- Child Care Fees – small increase in fees associated with before and after camp childcare
- General Clean up
 - deletions of various programs not offered

We are happy to meet with City Council in committee to discuss/review these changes. We are, however, up against a deadline for the Winter Recreation Brochure. The City traditionally has our camp fees posted in this brochure and have always touted the fact that our residents exclusively have 4 months to register for camps. We begin receiving registration in December and January. The Mayor and Recreation Department do not recommend moving forward with the Recreation Guide without the new rates posted. In order to meet the printing/delivery deadlines, legislation must be voted on by City Council no later than **November 5, 2018**. We respectfully request this item be scheduled for a Committee meeting and/or be placed on a Council Agenda before our deadline.

T.M.T.

Cc: Martin S. Horwitz, Mayor - Diane Calta, Law Director - Larry Heiser, Finance Director
Karen Carmen, Community Services Director - Pete Conces, Recreation Supervisor
Whitney Crook, Clerk of Council

Enclosure(s): Draft Fee Ordinance

INTRODUCED BY:

AMENDED ORDINANCE NO. 2018-

AN ORDINANCE AMENDING ORDINANCE NO **2017-153** WHICH AMENDED VARIOUS FEE SCHEDULES FOR THE RECREATION AND HUMAN SERVICES PROGRAMS FOR THE CITY OF BEACHWOOD, OHIO; AND DECLARING THIS TO BE AN URGENT MEASURE

WHEREAS, the Council of the City of Beachwood has previously passed Ordinance Nos.: 2016-30, 2016-119, 2017-133 and 2017-153 establishing various Fee Schedules for the Recreation and Human Services Programs; and

WHEREAS, the Administration, as set forth in a memorandum dated October 4, 2018, a copy of which is hereto and made a part hereof, requests that certain fees be increased.

NOW, THEREFORE, BE IT ORDAINED by the Council of the City of Beachwood, County of Cuyahoga, and State of Ohio that:

Section 1: The fee schedule for the Recreation and Human Services Programs is as Follows:

OUTDOOR POOL

Season Passes for Resident

Per Person	\$50.00 \$55
Per Family - not to exceed (Each additional member)	\$155.00 \$160 (4) \$20.00 \$25
Senior (60 years age or older)	\$25.00 \$30

There will be no Season Pass Rates for Non-Residents * *

Governess (does not reside in Beachwood; must accompany Beachwood youth pass holder under 11 yrs. of age)	\$60.00 \$65
Individual employed in Beachwood (non-resident taxpayer Not eligible for family passes). <i>This pass has The following restriction – only allowed to use Monday – Friday, no weekends (Sat/Sun) Or Holidays. Daily passes for guests may be purchased with the same restrictions.</i>	\$100.00 \$105
Individual employed at Beachwood City School District (Beachwood School Employees are eligible for family passes. Also, the pass has the following restriction – only allowed to use Monday – Friday, no weekends (Sat/Sun) or Holidays. Daily passes for guests may be purchased with the same restrictions	\$50.00 \$55

- * * All requests for a weekly pass for a non-resident guest living in a resident's house will be \$20/week per person. The purchaser must petition the Recreation Division using the proper form (obtainable from the Recreation Division). A decision will be made by a representative of the Recreation Division as to the validity of the request. All requests must be made prior to the week the pass is to be used.

AMENDED ORDINANCE NO. 2018-

Daily Rates

Children up to 3 years of age	NO CHARGE
Beachwood Residents (all times)	\$ 6
Senior Resident (60 years of age or older)	\$ 3.00 \$4
Non-Resident Guest (must be accompanied by a resident/individual employed in Beachwood)	\$10
Senior Non-Resident (60 years of age or older and must be accompanied by a resident/ individual employed in Beachwood)	\$ 5.00 \$6
Individual Employed in Beachwood	\$ 10
<i>The pass has the following restriction – only allowed to use Monday – Friday, no weekends (Sat / Sun) or Holidays</i>	

<u>Lessons</u>	<u>RESIDENT</u>	<u>NON-RESIDENT</u>
Learn-to-Swim (3 week session)	\$ 30	\$ 60
Learn-to-Swim, W.S.I. Life guarding	As determined by Red Cross	
Swim Team	\$ 80.00	\$ 90.00
Private Lessons	<u>Singles</u>	<u>Group of Two</u>
Residents	\$ 12.00 / ½ hr. \$ 15/½ hr.	\$ 16.00 / ½ hr. \$ 20/½ hr
Non-residents	\$ 16.00 / ½ hr. \$ 20/ ½ hr.	\$ 22.00 / ½ hr. \$ 25/½ hr

<u>Organized Birthday Party:</u> (Resident only)	\$ 50.00 75 minimum for up to 10 children plus \$ 3.00 5 per child after 10 th child
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DAY CAMPS - KIDZ AND BISON ALL DAY CAMPS

No. Of Weeks	Early bird (Resident)	Regular (Resident)	Regular (Non-Resident)
7 weeks	\$575.00 \$655	\$645.00 \$720	\$774.00 \$860
6 Weeks	\$545.00 \$620	\$610.00 \$680	\$735.00 \$820
5 Weeks	\$500.00 \$570	\$560.00 \$630	\$675.00 \$755
4 Weeks	\$440.00 \$500	\$490.00 \$550	\$595.00 \$665
3 Weeks	\$365.00 \$420	\$410.00 \$460	\$495.00 \$555
2 Weeks	\$290.00 \$330	\$320.00 \$360	\$435.00 \$490
1 Week	\$200.00 \$230	\$220.00 \$250	\$345.00 \$390

Add-On Rate (weekly)	\$200.00 \$230 for Resident	\$250.00 \$285 for Non-resident
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AMENDED ORDINANCE NO. 2018-

SPORTS CAMP

<u># of Weeks</u>	<u>Early Bird RESIDENT</u>	<u>Regular RESIDENT</u>	<u>Regular NON-RESIDENT</u>
6 Weeks	\$ 565.00 \$625	\$615.00 \$690	\$825.00 \$920
4 Weeks	\$ 440.00 \$480	\$470.00 \$530	\$680.00 \$760
2 Weeks	\$ 300.00 \$330	\$320.00 \$360	\$460.00 \$520

THEATER CAMP

<u>SESSIONS</u>	<u>Early Bird RESIDENT</u>	<u>Regular RESIDENT</u>	<u>Regular NON-RESIDENT</u>
Session 1 (5 weeks)	\$645	\$710	\$810
Session 1 (4weeks) <i>This is for kids attending private schools who are still in session during the 1st week</i>	\$510	\$560	\$660
Session 2 (2 weeks)	\$275	\$300	\$370
Both Sessions 7 weeks	\$860	\$945	\$1080
Both Sessions 6 weeks	\$725	\$800	\$935

THEATER CAMP TEEN MASTERS PROGRAM

<u>SESSION</u>	<u>Regular RESIDENT</u>	<u>Regular NON-RESIDENT</u>
Session 1	\$345.00 \$390	\$400.00 \$450
Session 2	\$145.00 \$170	\$183.00 \$210

TEEN TRAVEL CAMP

<u>SESSION</u>	<u>Regular RESIDENT</u>	<u>Regular NON-RESIDENT</u>
Any 1 Session	\$490.00 \$550	\$545.00 \$610
Both Sessions	\$825.00 \$920	\$925.00 \$1030

BEFORE AND AFTER CAMP CHILD CARE ENRICHMENT

Summer After and Before Camp Child Care

	Registered by <u>Weekly Deadline *</u>	Registered After <u>Weekly Deadline *</u>
A.M.	\$10.00 \$11.00/ day	\$20.00 \$22.00/day
P.M.	\$12.00 \$14.00/ day	\$24.00 \$28.00/day

*Deadline will be determined by Recreation Office

SOFTBALL / BASEBALL

	<u>Resident</u>	<u>Non-Resident</u>
Slow Pitch Softball/Baseball	\$55.00	\$75.00
Co-Ed Softball	\$325.00/team	
Traveling Teams	Price Determined Annually	

TENNIS

Passes	Residents - no fee
Guest Pass	\$4.00 per non-resident guests (must be accompanied by resident)

Tennis Ball Machine Rental

~~Resident Pass holder~~ — \$ 10.00 per one hour

SOCCER

	<u>RESIDENT</u>	<u>NON-RESIDENT</u>
Spring and Fall (Early Bird Registration)	\$ 33.00	\$ 48.00
Regular Fee	\$ 50.00	\$ 65.00

BASKETBALL

	<u>RESIDENT</u>	<u>NON-RESIDENT</u>
Adult League	\$ 250.00 per team	
Youth Basketball League	\$ 55.00	\$75.00

All recreation programs and facilities shall be available to City of Beachwood Employees and their immediate families for the "resident" rate. For purposes of this ordinance "immediate family" shall mean all persons related by marriage or blood who reside with the employee.

OTHER PROGRAMMING FEES INCLUDING HUMAN SERVICES/SENIOR ADULT PROGRAMMING

Fees to be determined per activity or per special program by Community Services Director.

~~Section 2: The Community Services Director, with the approval of the Mayor or his designee has the discretion to adjust the above rates under special circumstances.~~

AMENDED ORDINANCE NO. 2018-

Section 2: It is found and determined that all formal actions and deliberations of Council and its committees relating to the passage of this legislation that resulted in formal action were in meetings open to the public where required by Chapter 105 of the Codified Ordinances of the City.

Section 3: This ordinance is hereby declared to be an urgent measure necessary for the preservation of the public peace, health, safety, and welfare; and further that such fees may be established for publication in Recreation Brochures in a timely manner.

WHEREFORE, this Ordinance shall be in full force and effect from and after the earliest date permitted by law.

Attest: I hereby certify this legislation was duly adopted on the ____ day of _____, 2018 presented to the Mayor for approval or rejection in accordance with Article III, Section 8 of the Charter on the ____ day of _____, 2018.

Clerk

Approval: I have approved this legislation this ____ day of _____, 2018 and filed it with the Clerk.

Mayor

2018 Camp (Bison, Sports, Kidz, Teen Travel, Theatre) Expenses

BY SEASON

\$468,181* divided by 801 campers = \$584.50

*includes seasonal labor, supplies; field trips, busses, shirts

+ \$34,000/school divided by 801 campers = \$ 42.45

+ \$10,195/Shannon divided by 801 campers = \$ 13.73

TOTAL: \$639.68 per camper

BY DAY

\$468,181 divided by 34 days = \$13,770.40/day div/by 801 \$ 17.19 camper/day

\$ 34,000 divided by 34 days = \$ 1,000/day div/by 801 \$ 1.25 camper/day

\$ 10,195 divided by 34 days = \$ 299.85/day div/by 801 \$.37 camper/day

TOTAL: \$ 18.81 camper/day

\$18.81 x 34 = \$639.54/camper

INCOME

\$562,103.63 divided by 801 campers = \$701.75 per camper

\$701.75 divided by 34 days = \$20.63 a day or +\$1.83 above expenses

-REFLECTS NO CAMP FEE INCREASES-

SURROUNDING CITIES CAMP FEES 2018				
City	Resident Rate	Non-Resident	Notes	7 Week Rate
Shaker Hts.	\$145 per wk.	\$165 per wk.		\$1015/\$1155
Willoughby	\$96 per wk.	\$129 per wk.		\$672/\$903
Solon	Camp \$285 per session	N/A	2 week session	\$997.50
Solon	Adv. Camp \$310 per session	N/A	2 week session	N/A
Orange	\$829	\$899	7 weeks	
Rocky River	Member: \$330 per session Resident: \$365 per session	\$440 per session	3 week sessions	\$660/\$880 6 weeks only
Westlake	\$190 per wk.	\$210 per wk.		\$1330/\$1470
Twinsburg	\$80 per wk.	\$150 per wk.		\$560/\$1050
Highland Hts.	\$905	\$1,135	7 weeks	\$905/\$1135
Mayfield Village	\$230 per session	\$255 per session	2 week sessions	\$805/\$892.50
Mayfield Hts.	\$820	\$940	9 weeks	
	\$570	\$660	6 weeks	
	\$305	\$380	3 weeks	
Lyndhurst (YMCA)	\$145 per wk.	\$145 per wk. (need to buy membership fee for addl. \$25)	\$5 registration fee per child	\$1020/\$1045
Beachwood	\$575/\$645	\$774	7 weeks	\$575/\$774
Proposed 2019	\$655/\$720	\$860	7 weeks	\$655/\$860