



LOCAL GOVERNMENT
MANAGEMENT SERVICES, L.L.C.

Proposal

For

Assistance in Defining and/or Redefining the Managerial and Administrative Staffing Needs

for

**East Fallowfield Township
Chester County
Pennsylvania**

March 1, 2012

*Daniel P. Olpere, AICP
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Background

East Fallowfield Township is a moderate sized township in Chester County, Pennsylvania with a reported 2010 population of 7449. It has a total township budget of \$2.5 million dollars. The township currently has 16 full time employees, 3 part time employees, and 1 contracted employee. This total includes a full time treasurer/office administrator, secretary, and part time administrative assistant, a contracted code enforcement officer, and 5 employees in the road department. There are 8 full time and 2 part time police officers including the chief plus 1 administrative assistant.

The township has recently operated with a full time township administrator, but not in the capacity of township manager. The Board of Supervisors is now contemplating whether to create a new full time position for a professional manager or to continue operating by utilizing the services of a full time secretary-administrator or treasurer-administrator.

Project Goals

The purpose of this project is to provide professional assistance to the Board of Supervisors of East Fallowfield Township in evaluating the current managerial and administrative staffing needs of the Township. The purpose of the assistance will be to:

- Review the current workload, work efforts and activities of the Township Secretary, Office Manager and Administrative Assistant.
- Determine whether additional clerical, administrative or managerial assistance is needed.
- Determine whether different skill sets and abilities are needed to perform and undertake any additional tasks and responsibilities.
- Determine whether the needs of the Board of Supervisors are effectively being met.
- Determine whether it may be appropriate to hire a professional Township Manager

Scope of Services

Local Government Management Services, LLC proposes to provide the following services in conjunction with the evaluation of the position and workload of the Township Treasurer/Administrator and in the identification of needs for a new Township Manager position for East Fallowfield Township:

Task 1-Gathering of Information and Interviewing

- a. Meet with the Board of Supervisors together and individually to determine the Board's overall level of satisfaction/dissatisfaction with the current staffing arrangement.
- b. Interview Board members to determine collectively and individually what levels of expertise are desired in a township secretary, treasurer, administrator or manager and what types of services the secretary, treasurer, administrator or manager is expected to perform.

- c. Determine level of participation that the Board members desire in the day to day affairs of the Township (degree of "hands-on" management).
- d. Meet with key staff people to generate an understanding of the current work performed, supervisory responsibility, and relative skill levels. This would include the administrative staff, code enforcement officer, public works director and police chief.
- e. Meet with outside agencies and consultants such as the solicitor, and township engineer, to identify the amount and degree of interaction, and identify areas of improvement.
- f. Review desired areas of expertise.
- g. Review desired and necessary skills needed to do the job.
- h. Review Employee Handbook and make recommendation on sections to be completed or amended.
- i. Analyze Revenues and Expenses, Budget, Fee Schedule and Capital Budget and make recommendations for improvement.
- j. Review recent audits, including Liquid Fuels audits, and including the management audit and address findings.
- k. Work with Earned Income Tax Collector to maximize revenues.
- l. Review Parks and Parks maintenance schedule and make recommendations for improvements.
- m. Review Public Works department, staffing, duties and make recommendations for improvements.
- n. Review Township Administration office.
- o. Review refuse contract and invoices and make recommendations for improvements.
- p. Address areas of inefficiencies.
- q. Review various other reports, files, and inside paperwork comprising a majority of the clerical and administrative responsibility. This would include:
 - Job descriptions
 - Accounts payable
 - Accounts receivable
 - Relevant codes and ordinances
 - Employee benefits package
 - Insurance coverages
 - Recent agendas and minutes
 - Meeting preparations efforts and paperwork/reports to the Board
 - Miscellaneous correspondence

Task 2-Prepare Draft Report

- a. Prepare draft report to the Board of Supervisors with suggestions on what skills are needed to accomplish the Board's goals and on the scope of the desired position.

Task 3-Presentation of the Results

- a. Meeting with Board of Supervisors to review and discuss initial findings and recommendations.

Task 4-Preparation and Delivery of Final Report

a. Final written report will be made from the initial findings and to reflect the comments received from the Board.

Time Frame

LGMS will immediately begin to prepare the list of questions for the Board of Supervisors and staff and to meet with them to help define the position. It is expected that the entire process will take one to three months to complete. All work will be coordinated with the Board of Supervisors or the Board's representative.

Project Cost

Local Government Management Services, LLC proposes to provide assistance in evaluating the current managerial and administrative staffing needs for East Fallowfield Township for an hourly fee of \$65. It is expected that the project director will be available in the township offices approximately 15 to 20 hours per week for up to 3 months to observe the operations, review relevant documents and material, interview key stakeholders, prepare a report and recommendations for improvements, and generally be available for consultation with the Board of Supervisors. Fees will be billed monthly:

Payment is expected within 45 days of billing.

Additional Expenses

Additional costs include project work outside the scope of this proposal, as well as necessary business expenses. While none are expected, any additional work authorized by the Board outside of the scope of this project would be billed at the rate that is agreed upon for any additional services.

There will be no charge for mileage to East Fallowfield Township for meetings or interviews.

Deliverables

One final copy of the report on "Defining and/or Redefining the Managerial and Administrative Staffing Needs" will be provided in written format and digitally.

Statement of Qualifications

David Fiorenza will be the associate in charge of this project. His expertise lies in the area of municipal finance. He has served as the Chief Financial Officer for Radnor Township and has been in the municipal finance field for 21 years. He has also served as in the capacity of interim borough manager and interim finance director for communities in southeast Pennsylvania. See his Professional Profile, which is attached.

Daniel P. Olpere is the principle of the company and will provide expertise as needed on the project based on his many years of municipal management experience. Mr. Olpere has done consulting work for local governments in Pennsylvania since 1974.

He has also served as a full time Township/Borough Manager for over 32 years.

He has done training and management consulting for the Pennsylvania State Association of Township Supervisors and the Department of Community and Economic Development.

In 2003, Mr. Olpere began offering local government management consulting services on a full time basis to communities primarily throughout southeastern Pennsylvania.

See attached Professional Profile for additional information on Mr. Olpere's unique qualifications.

Letter of Authorization

Recruitment and Selection services must be authorized in writing by a representative of the Board of Supervisors prior to the start of work.

Expiration

This proposal is valid for a period of 60 days unless extended in writing by Local Government Management Services, LLC.

Respectfully Submitted:



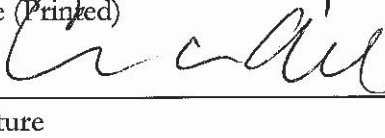
Daniel P. Olpere, President
Local Government Management Services, LLC

APPROVED by the East Fallowfield Township Board of Supervisors this 15 day of February, 2012.

BY:

Chris Makely
Name (Printed)

Chairman
Title


Signature



PROFESSIONAL PROFILE, DAVID M. FIORENZA

David M. Fiorenza is an associate of Local Government Management Services, LLC. His expertise lies in the area of Finance. In the 1980's, David worked in private industry for top banking, insurance and the mutual fund companies in Pennsylvania, Delaware and New York. In 1990, he decided to switch to municipal work and spent 16 years in this field. He started his municipal career at Radnor Township as the ACT 511 tax coordinator responsible for collecting and ensuring compliance for Business Privilege, Mercantile, Occupational and Amusement taxes. He initiated an annual ACT 511 tax audit program, which generated over \$2.8 million in Township revenues. In his years at Radnor, he was promoted to Assistant Director of Finance and in 2000 to Chief Financial Officer. He oversaw the preparation of the Township's Comprehensive Annual Financial Report, which has won the Government Finance Officers Association prestigious Certificate of Achievement for Financial Reporting for ten straight years. He also coordinated the Township's 2005 Swaption, which saved over \$900,000 in expenses and was instrumental in increasing the Township's municipal bond rating.

As a consultant, David has experience with Boroughs, Townships of the first and second class, and the PA Downtown Main Street Program. His expertise has included grant writing and revenue and expense enhancement strategies.

Mr. Fiorenza has a B.S. in Financial Management from Villanova University and an MBA from Widener University.

He is a 18 year member of the Government Finance Officers Association (GFOA) as well as a member of the International City Management Association (ICMA) and the PA Business Privilege & Mercantile Tax Collectors Association.

He has served on the board of the Pennsylvania GFOA and has held many positions in the South East Chapter of the PA GFOA, including President and Vice President. He has been a speaker at the both the GFOA National and State Conferences and is currently a Professor of Economics at Villanova University with a specialty in Public Sector Economics and Urban Economics. David is also an instructor in the Masters of Public Administration Program at Villanova University and the Life Long Studies Program at Immaculata College.

In 2003, Local Government Management Services began offering government consulting services on a full time basis to communities primarily throughout southeastern Pennsylvania. Their primary focus is assisting communities with the task of interim management and financial matters during periods of transition. Other services provided include organizational studies, personnel issues, recruitment of key staff positions, budget preparation, fiscal impact and financial analysis, grant writing, strategic planning, community visioning and zoning administration.

PROFESSIONAL PROFILE, DANIEL P. OLPERE, AICP



Daniel P. Olpere has done consulting work for local governments in Pennsylvania since 1974. During the mid 70's he worked full-time for a private firm based in State College, Pennsylvania and did various types of consulting including planning and zoning, fiscal management, personnel, grant-writing and ordinance codifications. Since that time he has worked on a limited part-time basis as a municipal consultant under his own name. He has done training and management consulting for the Pennsylvania State Association of Township Supervisors, the Pennsylvania Association of Boroughs, the Pennsylvania League of Cities and Municipalities and the Department of Community and Economic Development. Also during this time he has worked full-time as the Executive Director of the West Shore Council of Governments, the Borough Manager of Lemoyne Borough, and the Township Manager of Montgomery and Lower Providence Townships in Montgomery County. In his twenty years of service to Montgomery Township he helped to guide the overall growth of this once-rural area of 5,000 people into an economically healthy, affluent, suburban community of over 20,000.

Mr. Olpere has a B.S. in Community Development and an M.P.A. in Public Administration, both from Penn State. He is also a graduate of the renowned Dale Carnegie Course.

He is a 30-year member of the International City Management Association (ICMA) as well as the Association for Pennsylvania Municipal Management (APMM) and the American Planning Association (APA). In addition to his certification in the American Institute of Certified Planners (AICP), he is a certified trainer in both "Subdivision Review" and "Community Planning" by the Pennsylvania Municipal Planning Education Institute (PMPEI). He is also certified under the new Pennsylvania Act 45 as a "Building Code Official" (BCO).

He has served as President of the Montgomery County Consortium of Communities. He is a past member of the Boards of both the Transportation Management Association of Montgomery County and the Greater Valley Forge Transportation Management Association and recently served as Chairman of the Board of Governors of the Norristown (Lower Providence) Katharine Gibbs School. He is a member of the adjunct faculty at Villanova University where he teaches graduate courses in the Department of Public Administration.

In 2003, Mr. Olpere began offering local government management consulting services on a full time basis to communities primarily throughout southeastern Pennsylvania. His primary focus is on assisting communities with the task of interim management during periods of transition. He also provides general management including organizational studies, personnel issues, recruitment of key staff positions, budget preparation, fiscal impact and financial analysis, grant-writing, strategic planning, community visioning and zoning administration.