

**Final Report on the Government Efficiency Study**  
**MUNICIPALITY OF MT. LEBANON, PENNSYLVANIA**

**DRAFT**



**May 15, 2009**

# TABLE OF CONTENTS

May 15, 2009

	Page #
1. INTRODUCTION AND EXECUTIVE SUMMARY	1
2. FINANCE DEPARTMENT	22
3. FIRE DEPARTMENT	30
4. HUMAN RESOURCE FUNCTION	38
5. INFORMATION TECHNOLOGY OFFICE	44
6. INSPECTION OFFICE	52
7. PLANNING OFFICE	58
8. POLICE DEPARTMENT	66
9. PUBLIC INFORMATION OFFICE	88
10. PUBLIC LIBRARY	93
11. PUBLIC WORKS DEPARTMENT	97
12. RECREATION DEPARTMENT	111
13. TAX OFFICE	128

# **1. INTRODUCTION AND EXECUTIVE SUMMARY**

The Matrix Consulting Group, was retained by the Municipality of Mount Lebanon to conduct a Government Efficiency Study for all municipal operations. The report, which follows, presents the results of the study. This study was designed to provide an assessment of the efficiency and effectiveness of municipal operations, identifying strengths and improvement opportunities relating to organization, staffing and management. In this concluding point of the study, the project team has assembled this final report, which summarizes our findings, conclusions and recommendations.

## **1. AUDIT SCOPE AND OBJECTIVES**

The Municipality of Mt. Lebanon sought the conduct of a Government Efficiency Study to assist the Municipality in its continued efforts to streamline operations while maintaining existing service levels in an increasingly challenging economic environment.

In this Government Efficiency Study, the Matrix Consulting Group project team utilized a wide variety of data collection and analytical techniques. The project team conducted the following data collection and analytical activities:

- **Develop an in-depth understanding of the key issues impacting the Municipality.** To evaluate the Municipality, Matrix Consulting Group conducted interviews with members of the Commission, Municipality management and managers and staff in each municipal department. Interviews focused on goals and objectives, management systems, the use of technology, the levels of service provided by the department, the resources available to provide those services, etc. Additionally, interviews provided the project team with previous steps taken by the Municipality's Manager and Commission to maintain service levels within economic constraints.

- **Develop a Profile of the Municipality.** The Matrix Consulting Group conducted interviews with Municipality staff and other key staff in the Municipality of Mt. Lebanon to document current organization of services, the structure and functions of the various departments, budgets, workload data, management systems, inventory of the infrastructure, etc.
- **Provide an opportunity for employee input.** In addition to interviews, the Matrix Consulting Group administered an employee survey. This survey asked employees to evaluate a variety of statements regarding the overall operations of the Municipality as well as their departments and to identify constraints they faced as well as their perceptions on improvement opportunities.
- **Conduct a comparison of the Municipality's departments' program and practices to 'best management practices.'** The 'best management practices' included comparisons to industry standards developed by professional organizations, such as the American Public Works Association, American Planning Association, National Recreation and Parks Association, etc. Additionally, the project team also utilized the Matrix Consulting Group's library of best practices developed by the firm while conducting hundreds of management studies throughout the Country. The project team focused on best management practices for municipal operations, rather than state or federal agency practices.
- **Compile initial findings into a Phase 1 Report.** The project team conducted this study in two phases. The principal thrusts of this Phase 1 analysis were to accomplish the following:
  - Identify areas in which Municipality operations meet or exceed these standards of efficiency and effectiveness.
  - Identify areas where potential improvements should be evaluated.
  - Develop work plans for follow-up study in Phase 2 of this project.

The purpose of Phase 1 report, then, was to develop an overall assessment of Municipality operations and identify the issues that would be further evaluated and addressed in the Phase 2 report.

- **Conduct further analysis of issues identified in the Phase 1 Report and summarize analysis in the Phase 2 Report.** Based on initial findings developed for the Phase 1 Report, the project team evaluated additional data,

analyzed issues and alternatives, resulting in recommendations to staffing levels and management that would streamline operations and maintain existing service levels.

The objective of this study was to identify opportunities for improvement in the operational and economic efficiency while maintaining existing service levels. The Matrix Consulting Group was not asked to specifically identify high levels of services or evaluate alternatives that would result in a reduction in service levels.

## **(2) Methodologies**

The processes utilized in developing this study are described in the points below:

- The project team conducted interviews of the Municipality's Commission, as well as with the Municipality's management team to understand the historical practices in the Municipality, services levels and constraints. These interviews provided a context in which the study would be conducted.
- Interviews were conducted with staff in the various departments to understand staffing, operations, services levels, etc. to understand the mission, goals, objectives, business processes, service level targets, performance indicators, and initial issues and opportunities for improvement. Interviews were also conducted to obtain a detailed understanding of each department, including how services are delivered, staffed, managed, and the costs associated with the delivery of those services.
- The project team collected data regarding service delivery by the Municipality's departments, including organization of services, the structure and functions of the department, budgets, workload data, management systems, inventory of the infrastructure, etc.
- The Matrix Consulting Group compared practices and programs in each department to best management practices developed by the firm, as well as professional organizations. The specific focus of the best management practices were on practices that would improve efficiency rather than increased service levels.
- Based on the project team's initial findings in the Phase 1 Report, the Matrix Consulting Group analyzed data, evaluated operations and reviewed alternatives that resulted in the recommendations contained in this report.

The Government Efficiency Study report consists of a comprehensive review of the operations, management, and staffing of the Municipality. It is important to note that the project team was asked to evaluate the staffing, operations and management of municipal departments with respect to current service level standards (e.g., the Matrix Consulting Group was not asked to look at alternative levels of service, only at opportunities to provide existing service levels more efficiently).

## **2. BACKGROUND TO THIS STUDY**

Before presenting the recommendations contained in this final report, the project team wanted to take an opportunity to provide the reader with a summary of what it found in its review of the Municipality's current situation.

While priding itself in providing a full range of services at a high service level, Mt. Lebanon continues to face a series of short-term and long-range financial challenges. These pressures have put a premium on the need to ensure that public services are being delivered in a cost effective and efficient manner. As a result, the Municipality is exploring its service delivery system, in part through this study, and examining opportunities to ensure that services are provided as efficiently and cost effectively as possible.

There are two key factors impacting this study: (1) the Municipality's efforts over recent years to reduce costs by streamlining operations, contracts and implementing staffing reductions; and (2) the Municipality's desire to continue to provide a high level of service, as historically provided and expected by the community.

**(1) Background of the Economic Environment in the Municipality**

As part of the Government Efficiency Study, the project team made the following observations regarding the financial environment in the Municipality.

- **Commitment not to increase tax rates.** The Municipality and its Commission have made a commitment to maintain service levels, while not increasing tax rates. As illustrated in the table below, the Municipality of Mt. Lebanon’s millage rate has had limited to no increases over the past six years (and was reduced this fiscal year).

Year	Municipal Mills Levied
2004	4.34
2005	4.57
2006	4.79
2007	4.97
2008	4.97
2009	4.89

- **Frozen property assessment.** Unlike most communities in the area, Allegheny County property values have not been driven by the value of residential and commercial property due to the County’s freezing of assessments to 2002 ‘base year’ (i.e., there have been no systematic reassessments to allow municipal governments to capture increases in property values). In effect, this prevents the municipality from collecting additional revenue from increasing property values. As the table, below, shows, property values in the Municipality have been steadily increasing, even recently.

Year	Average Price
09/03-08/04	\$194,499
09/04-08/05	\$206,937
09/05-08/06	\$210,314
09/06-08/07	\$223,814
09/07-08/08	\$227,311
<b>% Change</b>	<b>17%</b>

Revenue generated from real estate (property taxes) accounts for approximately 24% of the Municipality’s annual revenue.

- **Flat and / or decreasing total revenues.** There are a number of sources of revenue for the Municipality that are limited in growth or are declining, including real estate, earned income tax, investment income, etc. For example, the number of real estate transactions has decreased by 25% in the last five years. The table, below, presents the number of property sales.

<b>Year</b>	<b>Number of Sales</b>	<b>% Change</b>
09/03-08/04	671	-
09/04-08/05	637	-5%
09/05-08/06	692	9%
09/06-08/07	602	-13%
09/07-08/08	533	-11%

The Municipality is projecting a 13.3% decrease for next fiscal year in deed transfer tax revenues as a result of the slow down in the housing market.

- **Increasing expenses.** Like many governments, the Municipality is experiencing rising costs of health care, energy, fuel, and supplies and materials. This not only affects the provision of direct services by the Municipality, but also the cost of contracting for services (e.g., refuse collection). For example, the table below presents the history of medical benefit costs for family coverage (e.g., percentage increase / decrease).

<b>Percentage Increase / (Decrease)</b>	
2005	6.64%
2006	-13.00%
2007	-8.40%
2008	5.25%
2009	29.00%
<b>Average</b>	<b>3.90%</b>

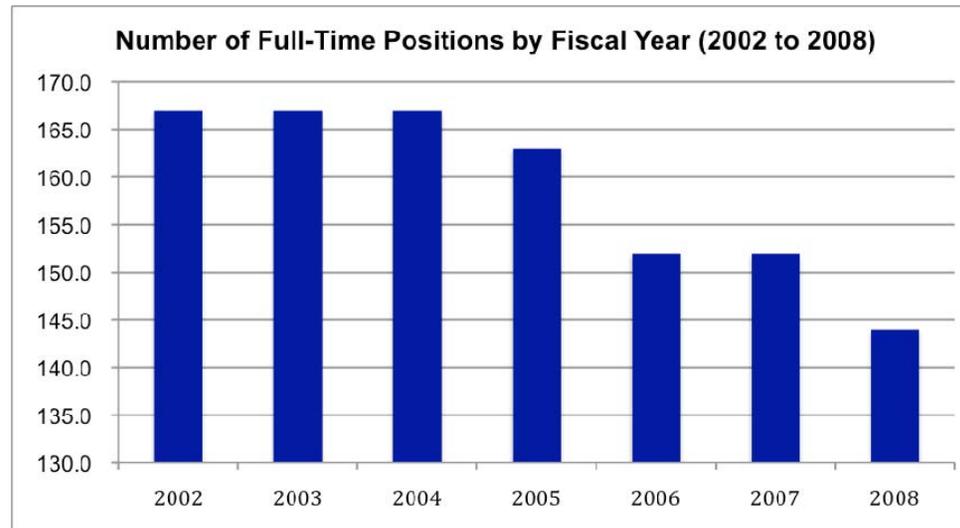
As shown in the table, the Municipality anticipates a 29% increase in medical benefit costs for family coverage for fiscal year 2009.

The Municipality of Mt. Lebanon has been operating under the financial constraints of limited growth in revenue and increasing expenditures. As the next section discusses, the Municipality has taken a number of steps to reduce the impact of those financial constraints on its operations.

**(2) Steps Taken by the Municipality**

In an effort to balance increasing expenses and declining revenues, the Municipality has taken a number of steps. The points, below, present a summary of the steps taken by the Municipality to mitigate effects of the current economic environment.

- Develop and maintain a strong financial position through conservation financial management, resulting in a Moody's Aa2 bond rating for the 2007 bond issuance.
- In determining the Municipality's bond rating, Moody stated that 'the Municipality's healthy financial position will remain stable in the medium term given conservative budget practices, timely tax rate increases, and budgeted increases to its undesignated fund balance.'
- Increase the Municipality's undesignated fund balance from 4.1% in 2004 to 9.0% in 2008 with a goal of maintaining a 10% undesignated fund balance.
- Evaluate municipal operations to determine services that could be more effectively and efficiently delivered. This has included a steady decline in personnel, as shown in the table below:



As the points above illustrate, the Municipality of Mt. Lebanon has taken several significant steps in recent years to ensure that it has positioned itself well to handle changing economic conditions. The Municipality has also used this strong financial and operational management to streamline services in the various operating departments. The points, which follow, present a discussion of the steps taken by the Municipality to improve the efficiency and effectiveness of how it operations.

- In a number of departments, staffing has remained relatively constant over the last few years, however, departmental responsibilities have increase. For example,
  - Staffing in the Finance Department has remained constant over the last decade. The current personnel allocation of 4.5 FTEs is the same as was present in 1999. With that said, staff have assumed additional / expanded duties over time to handle required financial services or policy development, which as strengthened the overall financial management of the Municipality.

- While the Community Development Department has increased staffing from 5.0 FTEs in 1999 to 7.0 FTEs currently, staff were added to address critical functions and / or gaps in services in the Municipality rather than basic operational services (i.e., additional personnel focused on GIS and economic development services). Further, key functions in this Department have been combined to allow for a single point of contact on many applications.
- Additionally, the Recreation Department has increased utilization of part-time and seasonal staff, as well as recommended the elimination of fulltime positions.
- There are a number of management systems in place to ensure that managers are effectively and actively managing operations, including:
  - Well-established financial policies and procedures.
  - Development and distribution of management reports prepared by Department managers and provided to the Municipality Manager and the Commissioners.
  - Monthly financial reports provided to operating departments.
- The Fire Department is a combination career and volunteer department. The Fire Department effectively utilizes its volunteers and has an active volunteer base.
- The Municipality has regionalized a number of programs in its Police Department, including animal control services, administration of MDT server for multiple agencies, Special Response and Tactical Negotiations Teams and a DUI taskforce. Additionally, the Municipality has jointly funded the School Crossing Guards with the Schools.
- Similarly, the Mt. Lebanon Public Library extensively utilizes volunteers to assist with services and reduce financial resource requirements. Additionally, the Public Library and its Friends of the Library organization is involved in fund raising to defray the cost of services to the Municipality.
- The Information Technology Office has implemented a number of programs to ensure the effective operations of the Municipality's information technology systems, including establishment of a data back up and recovery program, asset inventory and management and a replacement program.

- In the Department of Public Works, staff are effectively utilized by cross-assigning them to various jobs, work crews, and daily assignments. The Department has also contracted for a variety of services.
- The Tax Office has implemented a number of programs to aggressively identify and collect revenue. Additionally, the Office utilizes part-time staff to address peaks in workload.
- The Municipality utilizes part-time, seasonal, and cross-trained personnel extensively throughout the organization as an effective approach to maximizing staff utilization and reducing the need for full time employees.

Because of the best management practices in place in the Municipality, these departments were able to effectively absorb additional responsibilities and services without requiring additional personnel.

### **(3) Summary of the Service Situation in the Municipality**

The Government Efficiency Study was conducted in an effort to ensure that the efficient and effective operations of the Municipality with a goal of identifying cost saving measures which have not already been implemented by the Municipality. The Government Efficiency Study was not asked to evaluate or analyze alternative service levels. In essence, the study was to ensure that the provision of services was efficient, regardless of the level of service. With that said, the project team has noted in the points below observations regarding services levels that are significantly higher in Mt. Lebanon than in many communities in which the project has conducted studies. There is an obvious correlation between service levels and the resources required to maintain service levels.

As the Municipality continues to make difficult decisions while trying to balance revenue with the expectation of its citizens, the project team has highlighted, in the table below, areas in which the Municipality has exceptionally high levels of service.

<b>High Service Area</b>
The development review process has focused on high cycle times given the volume of activity and staffing. The Department has a plan review cycle time of 15 days for residential and 30 days for commercial development.
The Community Development Department has an extremely quick inspection request response time, generally responding to requests for inspection within two to three hours of the request and always within twenty-four hours.
The Municipality provides an extremely high and aggressive service level for the provision of municipal recreation programs and facilities for a community of its size (and with limited staff).
The number and diversity of recreation facilities is exceptionally, given its size. Facilities include recreation center, swimming pool, golf course, and ice rink.
The Department of Public Works provides weekly, curbside leaf collection.
Overall, proactive time in the Police Department is well over the range of 40% to 50%.
Response times in the Police Department are well within the range by priority.
Library circulation per cardholder is 19 items per person; the collection size is 5 items per capita – indicating not only a large collection but a highly utilized one.
Mt. Lebanon Public Library offers over 1,300 program elements.
The Library is open 68 hours per week during the school year and 64 hours per week during the summer (no Sunday hours). For a library this size, this is exceptional.

**3. EXECUTIVE SUMMARY – OVERALL RECOMMENDED BUDGETARY IMPACTS**

The table, which follows, presents a summary of the fiscal impacts of the recommendations contained in Phase 2 Report of the Government Efficiency Study.

<b>Department</b>	<b>Costs</b>	<b>Savings / Additional Revenue</b>	<b>Net Fiscal Impact</b>
Finance	–	–	–
Fire	–	(\$104,167)	(\$104,167)
Human Resources	–	(\$20,000)	(\$20,000)
Inspection	\$52,500	(\$20,000)	\$32,500
Planning / GIS	–	–	–
Police	–	(\$275,371)	(\$275,371)
Public Information Office	–	(\$24,900)	(\$24,900)
Public Library			
Public Works	–	(\$113,055)	(\$113,055)
Recreation	\$25,000	(\$350,000)	(\$325,000)
<b>Total</b>	<b>\$77,500</b>	<b>(\$907,493)</b>	<b>(\$829,993)</b>
<b>One-Time</b>	<b>\$77,500</b>	<b>(\$104,167)</b>	<b>(\$26,667)</b>
<b>Annual</b>		<b>(\$803,326)</b>	<b>(\$803,326)</b>

Presented in the table, on following pages, are the key findings and recommendations contained in this report.

**4. EXECUTIVE SUMMARY – DEPARTMENTAL RECOMMENDATIONS**

Issue	Analysis and Recommendations	Cost / (Savings)
<b>1. FINANCE</b>		
<p>Modifications to the financial system are prioritized and based upon ability to increase productivity of the software and enhance services provided electronically.</p>	<p>The municipality utilizes a financial system that has been developed specifically for the municipality. As such, it has been developed to conform to financial needs and practices employed in Mt. Lebanon. However, this requires that any changes desired by staff must be handled through contracted software programming. A plan for prioritizing software modification to expand functionality should be developed.</p>	<p>No additional costs estimated. Existing funds allocated to software modification should be prioritized to meet most critical needs identified.</p>
<p>Given the decentralized nature of the procurement function, the Finance Department should provide routine training to all departments regarding procurement policies and opportunities.</p>	<p>The current procurement function of the municipality is decentralized with most functions being handled at the Departmental level. The Finance Department should provide annual training to operating Departments regarding compliance with the procurement policies and informing / educating them of available state and regional procurement sources.</p>	<p>None</p>
<b>2. FIRE DEPARTMENT</b>		
<p>The Fire Department does not utilize operations personnel to conduct fire code and life safety inspections of local businesses.</p>	<p>Using operations personnel to conduct fire code and life safety inspections of business occupancies is an effective way to mitigate the incidence of fire and increase the utilization of operations personnel. The Municipality and the Fire Department should utilize line personnel to conduct fire and life safety code inspections of local businesses, in addition to the multi-family inspections being planned. The Municipality should also consider charging a fee to cover the costs of these services, in the range of \$50 to \$100 annually.</p>	<p>Depends upon implementation of program</p>

<b>Issue</b>	<b>Analysis and Recommendations</b>	<b>Cost / (Savings)</b>
<p>The Fire Department has a program called Fire Look Pro, which provides for mobile pre-planning of target hazards as well as geo-coded locations for hydrants, addresses, and photos. The Fire Department has also purchased touch screen computer to allow operations personnel with access to this information. However, the Fire Department has not updated its pre-fire plans for some time.</p>	<p>Pre-fire plans are important tools for managing fires and other large incidents. While the Department has purchased software, which allows for mobile access to pre-fire plan information, pre-fire plans have not been updated. The Fire Department should ensure that operations personnel are utilized for this purpose.</p>	<p>N/A</p>
<p>The Fire Department has requested that its two front line pumpers be replaced in 2012, at which point, they will be 10 years old, though they will remain as reserve apparatus. This is a very aggressive replacement plan for fire apparatus.</p>	<p>A 10-year replacement plan for fire apparatus is uncommon, particularly for small fire agencies. Typically, these targets are utilized in large agencies with very high vehicle utilization rates. However, the Municipality should plan for the purchase of the Quint in 2012 to replace the current 1992 ladder truck and provide better access to narrow roadways. The Municipality should also use a 15 year plan for front line fire apparatus. This approach would free up \$104,167 for other CIP purchases.</p>	<p>(\$104,167) Annually over the next 3 years</p>
<p><b>3. HUMAN RESOURCES</b></p>		
<p>The municipality of Mt. Lebanon should provide a centralized human resources function.</p>	<p>The provision of a centralized and dedicated human resources function will enable the municipality to devote greater focus and energy on employee relations, consistency in application of personnel rules and collective bargaining agreements, and greater management of employee benefit programs and expenses. The project team recommends that, upon vacancy, the position of Assistant Municipal Manager be reclassified to a Human Resources Director position to provide a more concentrated focus on employee relations and benefit management.</p>	<p>(\$17,500 to \$22,500)</p>
<p><b>4. INFORMATION TECHNOLOGY OFFICE</b></p>		

<b>Issue</b>	<b>Analysis and Recommendations</b>	<b>Cost / (Savings)</b>
Is there an information technology strategic plan in place that serves as a roadmap for the Municipality?	The Office of Information Technology is responsible for all of the Municipality's information technology needs, including hardware and software. The Office must work with municipal departments to prioritize resources. The Municipality should develop an information technology strategic plan to serve as a roadmap for the Municipality's information technology needs and to assist in long term planning and direction of technology for the entire Municipality on a comprehensive basis.	None
Are there management tools in place to assist with the management of information technology?	The Municipality should create an information technology committee to govern information technology resource allocation and prioritization on a Municipality-wide basis. The Office of Information Technology should also create service level agreements with its customer departments.	None
<b>5. INSPECTION OFFICE</b>		
The Inspections Office does not have a fully implemented and integrated permitting system that enables field access and entry of inspections.	The utilization of an automated permitting system would enable the more efficient processing of plan reviews, and inspection results. The system implemented should be integrated with field laptops to eliminate paper processing of inspection results.	Depends upon system selected. Range of \$25,000 to \$40,000.
Technology is effectively utilized to schedule and result inspections.	The implementation of an IVR system would eliminate the need for staff to personally handle each call requesting an inspection. Inspections would be scheduled via the telephone on the system, and the permitting software would schedule the inspection. The IVR system would also enable staff to result inspections in the field.	Estimated one time cost of \$20,000.

<b>Issue</b>	<b>Analysis and Recommendations</b>	<b>Cost / (Savings)</b>
Are staff resources effectively allocated to handle existing and anticipated workloads.	The implementation of technology resources outlined above would enable the reduction of staff time spent in the office handling paperwork associated with each inspection. The elimination of paperwork and entry of results associated with the inspections program (and plan review function) may enable the municipality to reduce administrative support from a full-time position to a part-time position over time.	(\$20,000)
<b>6. PLANNING / GIS OFFICE</b>		
Is there an adopted schedule for routine review and updating of critical enabling legislation (i.e. – Zoning Ordinance, Design Review Guidelines)?	A formal work plan should be developed to outline a multi-year plan of review and updating of enabling legislation including the zoning ordinance and design review guidelines. This plan should be developed in conjunction with the Council, the Planning Commission and the Municipal Manager to prioritize the schedule for review and updating. The work program should be integrated with the Municipal Planners on-going work program for long-range planning efforts.	None
Has a plan been developed of the highest priority needs for GIS system development to guide the allocation of limited staff time to meet the most critical needs of the municipality?	Staff has limited time available to develop new GIS layers and expand utilization of GIS software throughout the organization. A prioritization system should be developed, in conjunction with IT staff and operating departments, that clearly outline highest priority projects / layers for development.	None
<b>7. POLICE DEPARTMENT</b>		

<b>Issue</b>	<b>Analysis and Recommendations</b>	<b>Cost / (Savings)</b>
<p>In 2003, the Police Department modified its deployment of officers within patrol during the midnight shift. Analysis of workloads within patrol indicates that proactive time levels are above recommended targets.</p>	<p>The Police Department changed its minimum staffing target on the midnight shift from 3 Officer to 4 Officers. Though this was accomplished by transferring a detective, overtime appears to have increased as a result. Analysis of call for service workloads and officer availability indicates that proactive time, particularly on the midnight shift is well above recommended levels of 40 to 50%. However, in order to balance officer safety and productive time, the project team recommends that the Police Department modify its minimum-staffing plan slightly by reducing the minimum officer target on the midnight shift to 3. This approach better matches resources to workload while ensuring that a sufficient number of units are available for back-up. In addition, this approach will result in overtime cost savings, since the current staffing plan requires one additional position beyond the number authorized.</p>	<p>(\$196,213)            Annually in salaries, benefits, and overtime</p>
<p>Current workloads and time commitments within the Crime Prevention Unit do not support two full time positions.</p>	<p>The total time commitments required for 2 Officer presentations and events was 102 hours in 2007. Overall, 718 hours were committed to delivering programs / presentations individually in addition to the 102 hours of presentations which required 2 officers. This level of workload can be more cost effectively handled using overtime.</p>	<p>(\$79,158)            Annually</p>

<b>Issue</b>	<b>Analysis and Recommendations</b>	<b>Cost / (Savings)</b>
<p>The Investigative Services Unit does not utilize case management as effectively as it could to monitor workload.</p>	<p>The ISU uses case screening tools to prioritize cases and make assignments. In addition, a case status log is utilized by the supervisor to document cases. However, many of these cases are several months old with no indication of the last activity or prospects for solvability. Without this information, the supervisor is not able to get an accurate picture of the workload of each detective.</p> <p>The Police Department should adopt a policy that all open cases receive a supplemental report every 30 to document activity on a case. This includes a simple explanation of what activities have been performed within the past 30 days and additional leads for follow up. This change will allow the ISU to evaluate workload by investigator, better distribute caseloads, and focus efforts on higher priority, workable cases.</p>	<p>N/A</p>
<p>The Police Department does not utilize management reports, which identify the reasons for overtime.</p>	<p>During 2007, the Police Department reported “regular overtime” for field services of 284,545 out of a total of 354,981 for the Division. There is no additional information, which allows Department of Municipality Management to identify the cause of this overtime. For example, how much overtime was spent in order to maintain minimum staffing of 4 officers per shift, how much overtime was utilized for officer time spent handling calls that ran past their designated shift, how much overtime was utilized for training? Without this information, the Police Department and the Municipality cannot effectively determine how overtime is spent.</p> <p>The Police Department should track overtime usage by reason to better manage overtime spending.</p>	<p>N/A</p>

<b>Issue</b>	<b>Analysis and Recommendations</b>	<b>Cost / (Savings)</b>
The Police Department 's level of traffic enforcement is below the recommended range.	Research conducted by the Traffic Safety Institute suggests that the optimal level of traffic enforcement is 1:35 to 1:40 injury accidents to traffic citations and DUI arrests. Based on 2007 data, the Police Department's Traffic Enforcement Index is 1:30, slightly below the optimal range. The Police Department should utilize available proactive time within patrol to focus on traffic enforcement.	N/A
<b>8. PUBLIC INFORMATION OFFICE</b>		
Is the production of the MTL Magazine cost neutral?	The production of the Municipality's MTL Magazine should be cost neutral (i.e., supported by advertisement revenue). While it was this past year it has not in the past.	(\$24,900)
<b>9. PUBLIC LIBRARY</b>		
How to organize the Public Library to maximize its ability to raise revenue.	The Mount Lebanon Public Library should changing its organizational structure to a 501c3 not for profit organization in order for it to avail itself of additional fundraising opportunities.	Additional revenue through private fundraising efforts, grants which it is not eligible for now, etc.
<b>10. PUBLIC WORKS DEPARTMENT</b>		
Are fleet management programs centralized?	Centralize the management of the Municipality's fleet. DPW should be responsible for setting Municipality-wide policies, replacement guidelines and coordination and sharing of the fleet.	None
Is staffing for fleet maintenance adequate?	The project team analyzed the Municipality's fleet. Given the mix of in-house and contracted work, the project team recommends the reduction of a fleet maintenance position form 1.0 to 0.5 FTE hours.	(\$51,739)
Does the Department have the right staffing levels given the mix of in-house and contract work?	The project team recommends the elimination of 1.0 laborer position. This is in addition to the elimination of 1.0 FTE in the 2009 – 2010 budget.	(\$61,316)

Issue	Analysis and Recommendations	Cost / (Savings)
<b>11. RECREATION DEPARTMENT</b>		
Is there a comprehensive strategic plan in place to determine community needs (relative to recreation programming), facility sufficiency, and the marketing program for the department?	The Recreation Department does not have in place a strategic plan that evaluates the current programs and services provided against the identified needs of the Community. On-going customer feedback is not solicited as a means of determining whether programs offered are meeting residents needs. A comprehensive marketing plan should be developed to identify additional methods of promoting participation in programs.	No direct financial cost. Plan can be developed internally.
Does the Department cover all direct costs for the provision of programs and services?	At the present time, the Department is not covering all costs for services. Over the last several years, the amount of the annual "deficit" has been declining in most program areas, but only seasonal programs have routinely covered all costs. Facility costs in the past year, except for the pool, have recovered their costs. Additional efforts should be undertaken, including the conduct of a comprehensive user fee study, to set rates at a level sufficient to cover the total cost of service provision. Prior to adjusting fees, the Commission should adopt a cost-recovery policy that identifies that programs that should be 100% self-sufficient and those programs that will be subsidized (either through other program revenue or general funds).	\$25,000 for performance of user fee study.  (\$300,000 - \$450,000) Potential for increased revenues to offset general fund support if programs become self-sufficient (dependent upon specific cost-recovery goal adopted by the Commission).
Is there a comprehensive inventory of community resources available that identifies space suitable for use in providing community recreation programs?	The Recreation Department has traditionally utilized significant facility resources to supplement those available under the control of the Recreation Department (i.e. – Recreation Center). Additional free or low-cost community locations should be identified to provide alternatives and to supplement the limited space available within the Recreation Center.	None.

<b>Issue</b>	<b>Analysis and Recommendations</b>	<b>Cost / (Savings)</b>
Is there a comprehensive maintenance plan developed that identifies total deferred and on-going maintenance needs for the major Recreation Facilities under the control of the Department?	No comprehensive maintenance plan has been developed at this time. A comprehensive long-range maintenance and rehabilitation plan should be developed for major capital resources of the Department to enable decisions to be made during annual budgeting process regarding capital investment needs.	None.

## 2. FINANCE DEPARTMENT

### 1. DEPARTMENT SUMMARY

The Finance Department is responsible for the oversight and administration of the municipal fiscal operations and funds. Major functions include investment of funds, expenditure of funds, preparation of a variety of financial reports, accounting, payroll/personnel administration, insurance processing, risk management, cash management, sewage lien collections and processing, and tax certification letters. The overall organization, and number of authorized positions assigned to the Finance Department is shown in the table and chart that follow.

Function	Staffing by Classification	
Finance Department	Finance Director	1.00
	Assistant Finance Director	1.00
	Payroll Administrator	1.00
	Accounts Payable/Collections	1.00
	Account Clerk (part time)	.50

Organization of the Mt. Lebanon Finance Department



## **2. DEPARTMENTAL STRENGTHS**

Based on the project team's review of the Finance Department's organization, management, and operations, there are a number of areas where the Department meets or exceeds "best practices." These includes the following:

- Most staff have been cross-trained to provide backup for critical financial functions. Given the small size of the finance staff, the ability to expand cross-training is limited.
- The Department has developed extensive written financial policies and procedures (including a Risk Assessment conducted in accordance with the Statement of Auditing Standards on Risk Assessment #s 104 – 112). Written and adopted policies are in place to govern key financial transactions including: investments, collection procedures, returned checks, etc.
- The Department utilizes an integrated financial and human resources information system that has been developed specifically for the municipality.
- The Department has been awarded the GFOA budget awards.
- The municipality has developed a five (5) year capital improvement plan for use in planning longer-term for large capital investments necessary to support services.
- Appropriate internal and external financial controls are in place to regulate critical financial transactions (including cash investment, wire transfers, etc.).
- An annual review of fees charged by the municipality is conducted as part of the annual budgetary process.

### **3. PRINCIPAL IMPROVEMENT NEEDS**

There were only a few key issues identified in this study that need to be addressed by the Finance Department. Overall, the project team found a high level of service and presence of necessary financial controls within the department. These include the following:

- A plan for financial system modifications should be developed to prioritize changes and maximize use of limited software development funds. The system should be modified to enable electronic billings and payments.
- Additionally training should be provided to Departments regarding procurement practices.

### **4. SUMMARY OF RECOMMENDATIONS**

As a result of the project team’s analysis, the Municipality of Mount Lebanon should make several changes to the Finance Department. The Matrix Consulting Group makes the following recommendations:

<b>Issue</b>	<b>Analysis and Recommendations</b>	<b>Cost / (Savings)</b>
Modifications to the financial system are prioritized and based upon ability to increase productivity of the software and enhance services provided electronically.	The municipality utilizes a financial system that has been developed specifically for the municipality. As such, it has been developed to conform to financial needs and practices employed in Mt. Lebanon. However, this requires that any changes desired by staff must be handled through contracted software programming. A plan for prioritizing software modification to expand functionality should be developed.	No additional costs estimated. Existing funds allocated to software modification should be prioritized to meet most critical needs identified.

<b>Issue</b>	<b>Analysis and Recommendations</b>	<b>Cost / (Savings)</b>
Given the decentralized nature of the procurement function, the Finance Department should provide routine training to all departments regarding procurement policies and opportunities.	The current procurement function of the municipality is decentralized with most functions being handled at the Departmental level. The Finance Department should provide annual training to operating Departments regarding compliance with the procurement policies and informing / educating them of available state and regional procurement sources.	None

The detailed analysis of the above issues can be found in the following pages.

**FINANCE DEPARTMENT**  
**Expansion of Financial System Capabilities**

**Issue:**

Modifications to the financial system are prioritized and based upon ability to increase productivity of the software and enhance services provided electronically.

**Current Situation:**

The municipality utilizes a financial system that has been developed specifically for the municipality. As such, it has been customized to conform to financial needs and practices employed in Mt. Lebanon. While this approach provides, in many cases, a very functional system, it also requires that any changes desired by staff must be handled through contracted software programming. The ability to customize the system by staff is not possible. A plan for prioritizing software modification to expand functionality should be developed so that limited funds available for software modification are spent on the most critical functions.

Priority should be given to those software modifications that enhance the ability to conduct financial operations / transactions electronically, and that simplify tasks for staff utilizing the system.

**Analysis and Discussion:**

While a best practice is to utilize a financial management system that is available “off the shelf” (due to enhanced levels of support, greater functionality, etc.), the system in place for Mt. Lebanon appears to be meeting critical financial functions at an acceptable level. However, there are some functions that the current system is not fully capable of providing including electronic billing, purchasing, and payments. Discussion should be conducted with all operating departments to identify the most critical modifications necessary that would simplify or eliminate manual processes. The municipality should prioritize the implementation of these modifications to the financial system to reduce manual processes and increase the use of electronic capabilities (especially in the area of payments). The municipality should target achieving a minimum of 25% of payments processed electronically within the next three years.

**FINANCE DEPARTMENT  
Expansion of Financial System Capabilities**

**Recommendations:**

The Municipality should prioritize changes to the existing financial system and develop a plan of action, that can be supported by existing funds available for software modification, to enable the implementation of a greater range of electronic transactions – specifically in the areas of purchasing, billing, and payments.

**FINANCE DEPARTMENT**  
**Procurement Support**

**Issue:**

Given the decentralized nature of the procurement function, the Finance Department should provide routine training to all departments regarding procurement policies and opportunities.

**Current Situation:**

The current procurement function of the municipality is decentralized with most functions being handled at the Departmental level. The Finance Department should provide annual training to operating Departments regarding compliance with the procurement policies and informing / educating them of available state and regional procurement sources.

**Analysis and Discussion:**

The lack of a centralized procurement functions often results in increased cost of purchasing goods and services to an organization due to the inability to maximize bulk purchases, limited awareness of procurement sources, etc. While it does not appear appropriate, at this point in time, to develop a centralized procurement function within the Finance Department, there are several actions that should be undertaken by Finance Staff relative to the procurement function including:

- Provision of annual training for all departments on the procurement policy and available procurement sources (especially consortiums, state contracts, etc.), and
- On-going education regarding new procurement sources or available consortium / contract opportunities.

The Finance Director and Assistant Finance Director should provide annual and on-going training and education to all key staff involved in procurement in operating departments regarding the existing procurement policy (and how to maintain compliance), and education regarding existing consortium, state contracts, and other procurement sources that can be utilized for the purchase of good and services.

**FINANCE DEPARTMENT**  
**Procurement Support**

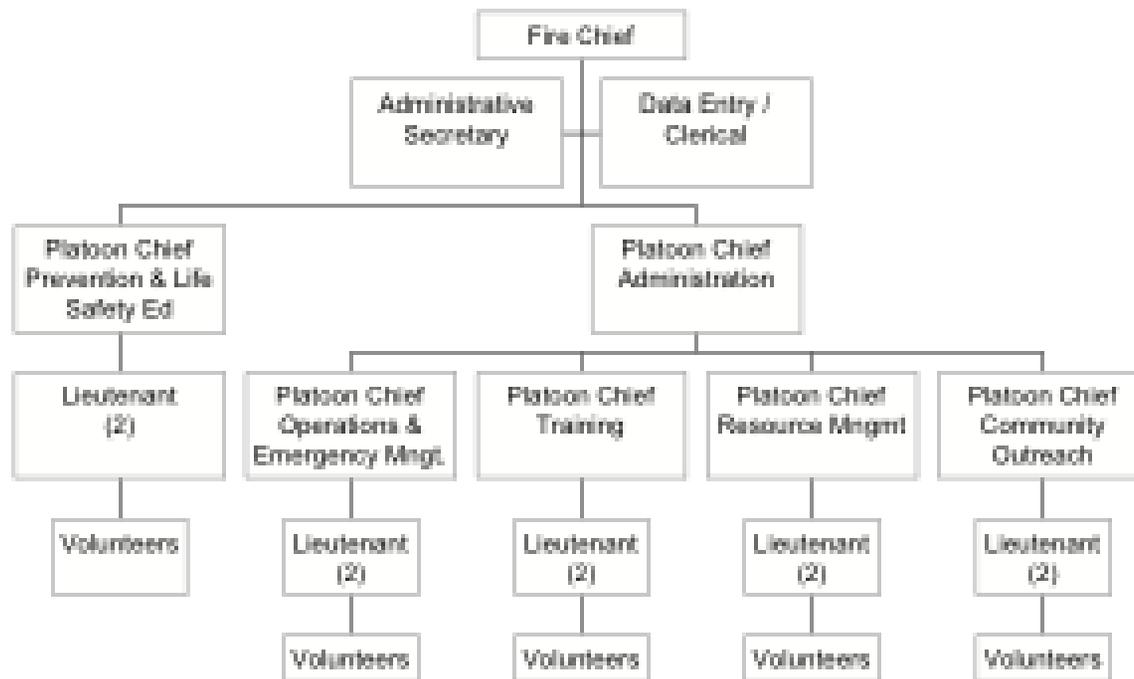
**Recommendations:**

Finance staff should provide annual training and ongoing education to operating departments on the procurement functions. Training should be focused on compliance with the adopted procurement policy. Additionally, education regarding available procurement sources – such as state contracts, consortiums, regional efforts, etc. – should be provided on an on-going basis to operating departments.

### 3. FIRE DEPARTMENT

#### 1. DEPARTMENT SUMMARY

The Fire Department is responsible for response to emergency incidents including fire, rescue, disasters, and other incidents. The Department also provides fire prevention and education programs to the Municipality. The overall organization, and number of authorized positions assigned to the Fire Department is shown in the chart, below:



## **2. DEPARTMENTAL STRENGTHS**

Based on the project team's review of the Fire Department's organization, management, and operations, there are a number of areas where the Department meets or exceeds "best practices." These includes the following:

- The Fire Department does a very good job of utilizing volunteer personnel to supplement its core of full time personnel during high risk, low probability incidents. As shown above, only 3 personnel are on duty each day for emergency response. Volunteer personnel are utilized during structure fires and other higher risk incidents where additional personnel are required.
- Volunteer personnel are used for fire prevention inspections as well as monthly "duty shifts" where they come into the station to provide additional staffing and train with career personnel. From January 1, 2008 to October 31, 2008, volunteer worked a total of 6,378 duty shift hours. Volunteer personnel are also used to supplement fire prevention inspections. During 2008, volunteers
- The Fire Department provides a number of community services / public education programming including: chimney inspections, home and business safety inspections, smoke detector installation for senior citizens, the junior firesetters program (which provides counseling for juvenile arson), and others.
- The Fire Department has organized collateral duty assignments by shift. This ensures that roles and responsibilities are clear for collateral duty assignments and that operations personnel are highly utilized. For example, the four platoons are assigned one of the following responsibilities: operations and emergency management, training, resource management, and community outreach.
- The Fire Department has mutual aid agreements in place with neighboring communities, which was facilitated through the South Hills Area Council of Governments.

## **3. PRINCIPAL IMPROVEMENT NEEDS**

There were several issues identified in this study that need to be addressed by the Fire Department. These include the following:

- The Fire Department has not implemented a pre-fire planning program. This ensures that operations personnel have a pre-incident plan for high risk properties which details: access issues, location of hydrants, location of utilities, apparatus placement, presence of hazardous materials, construction type, layout, and other facets of a building / property.
- The Fire Department has not yet implemented an engine company inspection program for all Municipality businesses. At the time of the project team’s on site visit, the Department was planning for engine crews to inspect apartment complexes. However, business occupancies were not included.
- The Fire Department has planned for the replacement of two engines based on a 10-year replacement plan. This is a very aggressive schedule, particularly given the workloads handled by the Fire Department (approximately 1,700 calls per year or 5 per day).

The next section provides the project team’s recommendations for the Fire Department.

**4. SUMMARY OF RECOMMENDATIONS**

As a result of the project team’s analysis, the Municipality of Mt. Lebanon should make several changes to the Fire Department. The Matrix Consulting Group makes the following recommendations:

Issue	Analysis and Recommendations	Cost / (Savings)
The Fire Department does not utilize operations personnel to conduct fire code and life safety inspections of local businesses.	Using operations personnel to conduct fire code and life safety inspections of business occupancies is an effective way to mitigate the incidence of fire and increase the utilization of operations personnel. The Municipality and the Fire Department should utilize line personnel to conduct fire and life safety code inspections of local businesses, in addition to the multi-family inspections being planned. The Municipality should also consider charging a fee to cover the costs of these services, in the range of \$50 to \$100 annually.	Depends upon implementation of program

<b>Issue</b>	<b>Analysis and Recommendations</b>	<b>Cost / (Savings)</b>
<p>The Fire Department has a program called Fire Look Pro, which provides for mobile pre-planning of target hazards as well as geo-coded locations for hydrants, addresses, and photos. The Fire Department has also purchased touch screen computer to allow operations personnel with access to this information. However, the Fire Department has not updated its pre-fire plans for some time.</p>	<p>Pre-fire plans are important tools for managing fires and other large incidents. While the Department has purchased software, which allows for mobile access to pre-fire plan information, pre-fire plans have not been updated. The Fire Department should ensure that operations personnel are utilized for this purpose.</p>	<p>N/A</p>
<p>The Fire Department has requested that its two front line pumpers be replaced in 2012, at which point, they will be 10 years old, though they will remain as reserve apparatus. This is a very aggressive replacement plan for fire apparatus.</p>	<p>A 10-year replacement plan for fire apparatus is uncommon, particularly for small fire agencies. Typically, these targets are utilized in large agencies with very high vehicle utilization rates. However, the Municipality should plan for the purchase of the Quint in 2012 to replace the current 1992 ladder truck and provide better access to narrow roadways. The Municipality should also use a 15 year plan for front line fire apparatus. This approach would free up \$104,167 for other CIP purchases.</p>	<p>(\$104,167) Annually over the next 3 years</p>

The detailed analysis of these issues can be found in the following pages.

**FIRE DEPARTMENT  
COMPANY INSPECTIONS**

**Issue:**

Does the Fire Department have a engine company inspection program for inspection of businesses?

**Current Situation:**

Fire code and life safety inspections of permitted occupancies (e.g. high piled storage, hazardous materials, assemblies, etc.) are currently performed by the Fire Prevention Unit. The Fire Department is also planning to implement a multi-family housing (e.g. apartment complexes) inspection program to be performed by operations personnel. However, the fire department does not utilize operations personnel to inspect local business.

**Analysis and Discussion:**

The use of operations personnel for simple inspections of local business for fire and life safety code violations is an effective means to increase the utilization of personnel and reduce the incidence of fire. During 2007, and for the first ten months of 2008, the Fire Department averaged just under 5 calls for service each day. These calls typically last between 30 minutes to 1 hour, unless there is a major structure fire or multi-casualty incident, both of which are rare. As a result, fire companies have time available to perform additional duties. Consequently, the Municipality and the Fire Department should consider implementing an annual business inspection program. Many municipalities across the country also charge fees for these inspections to recover some of the cost of providing these services. Fees typically range from \$50 to \$100 annually.

**Recommendation:**

The Municipality and the Fire Department should utilize line personnel to conduct fire and life safety code inspections of local businesses, in addition to the multi-family inspections being planned. The Municipality should also consider charging a fee to cover the costs of these services, in the range of \$50 to \$100 annually.

**FIRE DEPARTMENT  
PRE-FIRE PLANS**

**Issue:**

Does the Fire Department have a pre-fire planning program in place? Are pre-fire plans updated regularly by operations personnel?

**Current Situation:**

The Fire Department has a program called Fire Look Pro, which provides for mobile pre-planning of target hazards as well as geo-coded locations for hydrants, addresses, and photos. The Fire Department has also purchased touch screen computer to allow operations personnel with access to this information. However, the Fire Department has not updated its pre-fire plans for some time.

**Analysis and Discussion:**

A pre-fire plan or pre-incident plan is a tool used by many progressive fire agencies to plan for high-risk incidents. A pre-incident plan provides information about a property / target hazard including hydrant location, access, utility location, presence of hazardous materials, apparatus placement, etc. These plans should be updated on a regular basis to make sure that any changes are captured in the plan. The Fire Department has purchased software to provide for mobile access to pre-fire plans, address information, photos, and other information. The Fire Department should ensure that operations personnel are utilized to update pre-fire plans.

**Recommendation:**

The Fire Department should update its pre-fire plans and incorporate these into its Fire Look Pro software. Operations personnel, including volunteers, should be utilized for this purpose.

**FIRE DEPARTMENT  
APPARATUS REPLACEMENT**

**Issue:**

Does the Municipality and the Fire Department have a fire apparatus replacement plan? Is this plan consistent with vehicle utilization and maintenance costs?

**Current Situation:**

The Fire Department has requested that its two front line pumpers be replaced in 2012, at which point, they will be 10 years old. The Fire Department estimates that at this time, they will each have 50,000 miles and have made 12,000 runs.

**Analysis and Discussion:**

There are very few small to medium sized cities that utilize a 10-year replacement plan for fire engines and trucks in a front line capacity. Only in large agencies with very high utilization levels (e.g. 100,000 miles or more and 3,000 runs each year) utilize such an aggressive replacement plan. Even large agencies like Phoenix, Sacramento, and El Paso do not follow a 10-year replacement plan. Most agencies use a 15-year replacement target for fire engine and trucks. Based on the level of workload and utilization, this plan is more than adequate for the Municipality.

One of the replacement vehicles would be a 75 foot Quint which functions as both a pumper and a ladder truck. The Fire Department has indicated this vehicle would provide better access to narrow alleys, streets, and service roads, not accessible by the ladder truck. The current ladder truck is also a 1992 model and will therefore be 17 years old. Typically, the cost of a Quint is around \$750,000. The Department has estimated a total purchase cost of \$1.25 million for a new pumper and Quint. As a result, the Quint should be purchased as planned, in 2012.

**Recommendation:**

The Municipality should change the current apparatus replacement plan for the Fire Department, from 10 years to 15 years in a front line capacity (plus reserve status). The engine planned for purchased in 2012 should be pushed back to 2017. However, the Quint should be purchased in 2012 in order to replace the 1992 ladder truck and provide better access to alleyways, service roads, and narrow streets in the Municipality.

Assuming that the Municipality saves over the next eight years for the purchase of a new engine in 2017 instead of saving each year until 2012, the estimated annual cost savings is \$104,000 (based on a purchase price of \$500,000).

## **4. HUMAN RESOURCES FUNCTION**

### **1. FUNCTION SUMMARY**

At the present time, there are no dedicated human resources professionals within the Mt. Lebanon organizational structure. The traditional functions are split between departmental responsibility to perform and limited centralization of key functions that are performed by the individuals listed below. The overall organization, and number of authorized positions assigned to the Human Resources functions are shown in the table and chart that follow.

<b>Function</b>	<b>Staffing by Classification</b>	
Human Resources	Assistant Municipal Manager*	1.0
	Personnel/Payroll Administrator*	1.0
* Positions currently are also responsible for the performance of other functions within the Municipality. The performance of Human Resources functions is only an ancillary function of the positions.		

Currently, these positions are organizationally allocated as follows:

- The Assistant Municipal Manager is located within the Municipal Manager's Office.
- The Personnel/Payroll Administrator is located within the Finance Department.

### **2. FUNCTION STRENGTHS**

Based on the project team's review of the Recreation Department's organization, management, and operations, there are a number of areas where the Department meets or exceeds "best practices." These includes the following:

- Maintenance of a central personnel file containing all documents related to pay and benefits.

- Central tracking off leave use and accrual.
- Single point of contact for interpretation of collective bargaining agreements and personnel rules.

### **3. PRINCIPAL IMPROVEMENT NEEDS**

There were several issues identified in this study that need to be addressed by relative to the Human Resources function. These include the following:

- There is a need for a more concentrated effort and focus on managing the human resources activities of the municipalities. Several concerns were identified regarding the ability to get timely responses to personnel policies and procedures under the current system.
- A greater focus should be placed on the on-going management of employee benefit programs – typically one of the largest annual expenditures after direct salary costs. The municipalities ability to effectively manage these costs will be difficult unless dedicated personnel are responsible for this effort.
- The ability to ensure organization-wide compliance and consistency in application of human resources practices, equal employment opportunity, good employee relations can be enhanced with a dedicated professional focused on the human resources function.

### **4. SUMMARY OF RECOMMENDATIONS**

As a result of the project team's analysis, the Municipality of Mount Lebanon should make several changes to the provision of Human Resources functions. The Matrix Consulting Group makes the following recommendations:

<b>Issue</b>	<b>Analysis and Recommendations</b>	<b>Cost / (Savings)</b>
The municipality of Mt. Lebanon should provide a centralized human resources function.	The provision of a centralized and dedicated human resources function will enable the municipality to devote greater focus and energy on employee relations, consistency in application of personnel rules and collective bargaining agreements, and greater management of employee benefit programs and expenses. The project team recommends that, upon vacancy, the position of Assistant Municipal Manager be reclassified to a Human Resources Director position to provide a more concentrated focus on employee relations and benefit management.	(\$17,500 to \$22,500)

The detailed analysis of the above issues can be found in the following pages.

<b>HUMAN RESOURCES FUNCTION</b> <b>Establishment of a Human Resources Function.</b>
--

<b>Issue:</b>
---------------

The municipality of Mt. Lebanon should provide a centralized human resources function.
--

<b>Current Situation:</b>
---------------------------

At the current time, Mt. Lebanon does not have a centralized human resources function. Current services are either provided by the individual operating departments, the personnel payroll administrator (personnel files, payroll, etc.), or the Assistant Municipal Manager (collective bargaining, personnel rule/collective bargaining contract interpretation, benefits management). Additional support for the human resources function is provided to these individuals by others throughout the organization as needed.
---

**HUMAN RESOURCES FUNCTION**  
**Establishment of a Human Resources Function.**

**Analysis and Discussion:**

The current approach to the management of employee and labor relations functions is fragmented. Several issues were noted regarding the ability to obtain timely response to questions or concerns regarding the applicability of contract provisions / personnel rules to individual employee situations. Additionally, the lack of a centralized human resources function limits the accountability for the on-going management of personnel policies and benefit programs as it is divided among several individuals. Finally, the level of support provided to individual departments in handling employee relation matters is limited – providing the opportunity for liability to the organization due to poorly trained / supported managers and supervisors in handling employment matters.

A consistently utilized benchmark for a dedicated human resources professional is one (1) HR Professional per 125 to 150 full-time employees. With Mt. Lebanon employing a total of approximately 144 full-time plus an extensive part-time and seasonal workforce, this supports a dedicated human resources professional. The project team recommends that the municipality implement one full-time Human Resources Director who is assisted half-time by the existing Personnel/Payroll Administrator in the Finance Department. The Personnel/Payroll Administrator should have a dual reporting relationship to both the Human Resources Director and the Finance Director.

In evaluating the need for this additional position, the project team considered the addition of new position and the reclassification of an existing position. Following review, the project team recommends that the Assistant Municipal Manager position be reclassified to a Human Resources Director position. That position currently performs a significant level of work activities in the Human Resources arena including labor negotiations, benefits management, personnel policy and collective bargaining interpretation and enforcement, etc.). Given the limited financial resources of the municipality, the project team believes that the overall operation of the organization will benefit from the limited staff resources being allocated to this function. While the new position would need to be classified, we estimate that the cost savings on an annual basis could approximate \$17,500 to \$22,500, inclusive of benefit costs. Implementation of this recommendation will require the reallocation of some functions currently provided by the Assistant Municipal Manager to other individuals.

**HUMAN RESOURCES FUNCTION**  
**Establishment of a Human Resources Function.**

**Recommendations:**

Mt. Lebanon should implement a centralized human resources function consisting of a dedicated Human Resources Director supported part-time by the existing Personnel/Payroll Administrator position. This should be implemented, upon the next position vacancy, through the reclassification of the Assistant Municipal Manager position to the Human Resources Director position.

## 5. INFORMATION TECHNOLOGY OFFICE

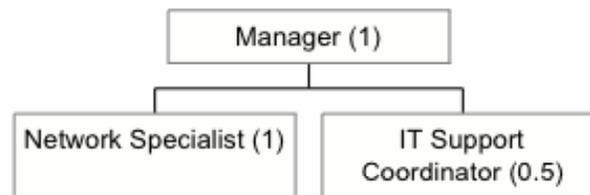
### 1. DEPARTMENT SUMMARY

Information Technology is responsible for supporting the Municipality’s technological needs. Information Technology oversees the municipal phones, PDAs, software and hardware. The Office also provides help desk support, equipment upgrades and replacement, oversees contractors and vendors and assists with the acquisition of technological solutions.

Function	Staffing by Classification	
Information Technology	Manager	1.00
	Network Specialist	1.00
	IT Support Coordinator	0.50

The Information Technology Office is organized as follows.

**Current Organization of  
Information Technology  
Mt. Lebanon, Pennsylvania**



## **2. DEPARTMENTAL STRENGTHS**

The project team compared the organization, operations, and management of the Information Technology Office to 'best practices.' This section highlights a number of key strengths with respect to the Information Technology Office. This includes a discussion of the steps taken in the Office to reduce costs and increase the efficiency and effectiveness of operations. The points, which follow, present this discussion.

- The Information Technology Office is a relatively small department of 2.5 fulltime equivalents that supports the entire Municipality's information technology needs. This includes hardware and software support.
- This Office has taken steps to minimize costs, including the sharing of administrative and clerical staff with another municipal department.
- The Information Technology Office has centralized management and responsibility for the Municipality's information technology needs, services and programs.
- The Information Technology Office has developed a number of programs, including a data back up and recovery process, asset inventory and management and a inventory refresh program.
- The Office has also centralized technology procurement.

Overall, there a number of strengths within the Office of Information Technology, which has taken a number of steps to reduce cost while maintaining service levels.

### **3. PRINCIPAL IMPROVEMENT NEEDS**

The project team identified a number of opportunities for improvement with respect to the management and operations of the Office of Information Technology. The points, which follow, present a summary of the improvement opportunities.

- There are a number of opportunities to formalize the management of technology in the Municipality. For example, the Office of Information Technology has not developed a formal, strategic plan or written policies and procedures pertaining to technology (e.g., hardware / software standards, etc.)
- The Office of Information Technology has not developed formal use agreements for its customers.
- There are opportunities to expand technology in the Municipality (e.g., implement online / web-based payments).

Overall, the Office of Information Technology has implemented a number of tools to manage the Municipality's information technology. However, there are additional 'best practices' from which the Municipality could benefit from their implementation.

### **4. SUMMARY OF RECOMMENDATIONS**

As a result of the project team's analysis, the Municipality of Mount Lebanon should make several changes to the Information Technology Office. The Matrix Consulting Group makes the following recommendations:

<b>Issue</b>	<b>Analysis and Recommendations</b>	<b>Cost / (Savings)</b>
Is there an information technology strategic plan in place that serves as a roadmap for the Municipality?	The Office of Information Technology is responsible for all of the Municipality's information technology needs, including hardware and software. The Office must work with municipal departments to prioritize resources. The Municipality should develop an information technology strategic plan to serve as a roadmap for the Municipality's information technology needs and to assist in long term planning and direction of technology for the entire Municipality on a comprehensive basis.	None
Are there management tools in place to assist with the management of information technology?	The Municipality should create an information technology committee to govern information technology resource allocation and prioritization on a Municipality-wide basis. The Office of Information Technology should also create service level agreements with its customer departments.	None

The detailed analysis of the above issues can be found in the following pages.

**INFORMATION TECHNOLOGY OFFICE**

**The Information Technology Office should develop a strategic information technology plan.**

**Issue:**

Is there an information technology strategic plan in place to assist in the prioritization of resources and long-term planning of technology programs?

**Current Situation:**

The Office of Information Technology is responsible for managing and maintaining the Municipality's technology programs, including hardware and software, procurement, data recovery and backup plans, etc. This Office works with all municipal departments to identify their information technology needs, as well as support their technology requirements.

**Analysis and Discussion:**

The Municipality is an information-based organization. If the Municipality is to successfully respond to the challenges that lie ahead, support business goals and objectives, improve programs, measure performance, make good policy decisions, and respond to rapid changes in business requirements, it must continue to improve the way that it uses its technology and information resources.

The improvement of the use of technology, given the scarce financial resources available to the Municipality, necessitates the development of a strategic plan to address such areas as the integration of information from different databases, the level of IT expenditures for application development and priorities over the next several years, and managerial accountability for implementation and timeframes for implementation of the plan.

The strategic plan should identify both a vision for information technology as well as the specifics over the next three to five years that will be utilized to accomplish that vision. Not all of the vision will be realized over the three to five years; the plan should identify priorities for allocation of scarce financial resources and the costs of the prioritized technological expenditures over the next three to five years.

## **INFORMATION TECHNOLOGY OFFICE**

### **The Information Technology Office should develop a strategic information technology plan.**

#### **Recommendations:**

The information strategic plan should include guiding principles for the investment of scarce financial resources in information technology (such as utilizing these investments to eliminate inefficient tasks and duplicate data). The strategic plan should also include a number of relevant topics including the following:

- The mission, goals and objectives of the Information Technology Office. This should include identifying the staff responsible for implementation of the objective and the time frame for implementation.
- A description of the current information technology environment – in terms of file servers, desktops, operating systems, telephone network, data network, video network, LAN support service, etc.;
- A SWOT analysis that presents the strengths, weaknesses, opportunities, and threats (such as technology obsolescence);
- The planned information technology changes in response to the SWOT. The Office of Information Technology should include specific plans to address areas identified in the SWOT to address weaknesses relating to technology (e.g., system integration, system downtime, prioritization of resources, procurement, expansion of technology, etc.)
- A description of strategic issues. For each significant strategic issued identified, the Office of Information Technology should develop a description of the issue to include a summary of the issue, how it impacts current operations of the Municipality and how resolves the issue would improve operations, services and costs.
- A work program for each strategic issue that identifies the following:
  - The title of the initiative;
  - The priority of the initiative;
  - The business requirement of the initiative;
  - The information technology goals and objectives supported by this initiative;
  - A description of the initiative; and
  - Estimated resources or costs required by the initiative (broken down by hardware, software, staffing costs, communication services, training, software annual maintenance, and hardware annual maintenance.

The purpose of the information technology strategic plan is to provide a road map for the Municipality and identify how to best allocate scarce financial resources given the inevitable competing demands.

**INFORMATION TECHNOLOGY OFFICE**

The Office should implement a number of management tools.

**Issue:**

Are there management tools in place to assist with the management of information technology?

**Current Situation:**

The Office of Information Technology has implemented a number of best practices, including:

- Meets with customers to determine their information technology needs.
- Oversight and management of most technology in the Municipality, including hardware and software, networks, procurement and telephone systems.
- Development of a number of written policies and procedures, such as web and email usage, security, licensing requirements, etc.
- Provision of training to customer groups.
- Development of system back up and data recovery programs.
- Provision of help desk and end user support.

The Office of Information Technology has implemented a number of best management practices to ensure the efficient operations of the Office.

**Analysis and Discussion:**

There are a number of opportunities to improve the overall management of information technology in the Office of Information Technology. For example:

- An information technology steering committee has not been formed to provide an opportunity for customer input and guidance. The purpose of an information technology steering committee is:
  - To consider and recommend policies and strategies for information technology;

**Analysis and Discussion (continued):**

- To consider and recommend a municipality-wide strategic information technology plan and to prioritize goals and objectives;
  - To prioritize funding for information technology;
  - To establish a means of regular communication between customers and the Office of Information Technology;
  - Review trends and areas of complaints to deal with the root cause.
- Service level agreements with customer departments have not been developed and adopted. The purpose of service level agreements is:
    - The services to be provided;
    - The funding resources required for acquisitions, maintenance, and repair;
    - The terms and conditions under which the customer and the Office of Information Technology will operate in order to properly support the Municipality’s information technology investment;
    - The standard business practices including how compliance with the service agreement will be measured, problem (trouble) reporting protocol, how to request services, emergency service priorities, services provided after hours, etc.;
    - The services provided and not provided; and
    - The dispute resolution process.

**Recommendations:**

The Municipality should create an information technology committee. This should be lead by the Office of Information Technology and should include representatives from all major departments.

The Office of Information Technology should create service level agreements with its customer departments.

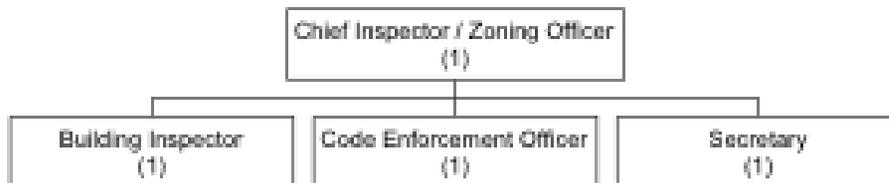
## 6. INSPECTION OFFICE

### 1. DEPARTMENT SUMMARY

The Building Inspection Office is responsible for providing all services related to construction within Mt. Lebanon. These services include plan review (for code compliance), permit issuance, new construction building inspections, code enforcement (relative to minimum property standards, health and safety), and all inspections related to grading, health and safety, solid waste, and zoning provisions of the Mt. Lebanon municipal code. The Office also conducts annual swimming pool inspections. The overall organization, and number of authorized positions assigned to the Inspection Office is shown in the table and chart that follow.

Function	Staffing by Classification	
Inspection Office	Chief Inspector / Zoning Officer	1.00
	Building Inspector	1.00
	Code Enforcement Officer	1.00
	Secretary	1.00

Organization of the Mt. Lebanon Inspection Office



## **2. DEPARTMENTAL STRENGTHS**

Based on the project team's review of the Inspection Office's organization, management, and operations, there are a number of areas where the Department meets or exceeds "best practices." These includes the following:

- Inspection requests are accepted at all times and responded to the same day based upon the following schedule:
  - Inspection requests received before 10 a.m. are handled between 10:00 a.m. and Noon;
  - Inspection requests received after 10 a.m. are handled between 2:00 p.m. and 4:00 p.m.; and
  - Inspection requests received after 2:00 p.m. (if not handled same day) are handled during the following days morning inspections.
- Inspectors are handling more than one trade when conducting inspections. Some inspections are handled through external agencies (i.e. – electrical inspections by Middle Department Inspection Agency and plumbing inspection by the Alleghany County Health Department). Reinspection fees are charged when necessary.
- Building plan reviews are conducted concurrently. Staff review all plans for both building code and zoning code compliance. Review times meet best practices standards with residential reviews conducted within 15 days and commercial permits within 30 days.
- Code enforcement complaints typically receive an initial inspection within five (5) days of receipt of the complaint.

## **3. PRINCIPAL IMPROVEMENT NEEDS**

There were several issues identified in this study that should be addressed to improve the efficiency of the Inspection process and to increase efficiency and effectiveness of staff to handle increasing workloads. These include the following:

- The implementation of on-line inspection results and requests for inspection.
- The utilization of an IVR (interactive voice response) system would enable all inspection requests to be requested and assigned through the telephone without the need to talk with a staff member.
- The utilization of laptops tied to an automated permitting and inspection software system, would enable field entry and printing of inspection results (building code and property maintenance), placement of results on-line for access by the customer, and eliminate need to enter results in the office.

The next section provides the project team’s recommendations for the Inspections Office.

**4. SUMMARY OF RECOMMENDATIONS**

As a result of the project team’s analysis, the Municipality of Mt. Lebanon should make several changes to the Inspection Office. The Matrix Consulting Group makes the following recommendations:

<b>Issue</b>	<b>Analysis and Recommendations</b>	<b>Cost / (Savings)</b>
The Inspections Office does not have a fully implemented and integrated permitting system that enables field access and entry of inspections.	The utilization of an automated permitting system would enable the more efficient processing of plan reviews, and inspection results. The system implemented should be integrated with field laptops to eliminate paper processing of inspection results.	Depends upon system selected. Range of \$25,000 to \$40,000.
Technology is effectively utilized to schedule and result inspections.	The implementation of an IVR system would eliminate the need for staff to personally handle each call requesting an inspection. Inspections would be scheduled via the telephone on the system, and the permitting software would schedule the inspection. The IVR system would also enable staff to result inspections in the field.	Estimated one time cost of \$20,000.

<b>Issue</b>	<b>Analysis and Recommendations</b>	<b>Cost / (Savings)</b>
Are staff resources effectively allocated to handle existing and anticipated workloads.	The implementation of technology resources outlined above would enable the reduction of staff time spent in the office handling paperwork associated with each inspection. The elimination of paperwork and entry of results associated with the inspections program (and plan review function) may enable the municipality to reduce administrative support from a full-time position to a part-time position over time.	(\$20,000)

The detailed analysis of these issues can be found in the following pages.

**INSPECTION OFFICE**  
**Technology Utilization**

**Issue:**

Does the Inspection Office make effective use of technology to reduce staff processing time and eliminate manual / duplicate entry of plan review and inspection comments?

**Current Situation:**

Currently, the plan review and inspections processes are highly manual and paper-intensive. While staff allocated are generally utilized in a cross-trained approach (handling of multiple types of reviews / inspections), the use of technology is limited. No IVR (interactive voice response) system is currently in place and the utilization of an automated permitting system is lacking.

**Analysis and Discussion:**

Most communities, large and small, have implemented a higher level of technology to support the work activities of professional staff by eliminating the manual processing of plan review comments, inspection requests, and the resulting of inspections. The automated permitting system is generally supplemented with the utilization of an IVR system that enables customers to request inspections through the phone system without the need to talk to a staff member. Additionally, the IVR system will enable field resulting of inspections which makes results immediately available (as soon as inspection is complete and entered by staff in the field) on the IVR and if integrated, on-line, through the permitting system. Additionally, most inspections offices have moved to the utilization of field lap-tops to enable entry of inspection results in the field (while also having access to all prior inspection history) which eliminates the need for manual note-taking in the field with subsequent entry of inspection results in the office.

**Recommendation:**

The Municipality should implement, at a minimum, an IVR system to enable automated inspections requests and resulting and ideally, to integrate with a fully automated permitting system that enables on-line access to plan review and inspection requests for customers, and field entry by Municipal staff. Additional one-time technology costs should be anticipated in the range of \$45,000 to \$60,000 to implement the permitting and IVR system.

The implementation of additionally technology resources, while requiring an initial investment of capital funds, should enable the longer-term reduction in the level of administrative support required to support the three professional staff members through the elimination of most calls for inspections, office entry of inspection results / plan review comments, etc. as professional staff directly enter these items into the permitting system upon plan review and result inspections in the field. Potential savings would approximate \$20,000 annually by reducing the position to half-time.

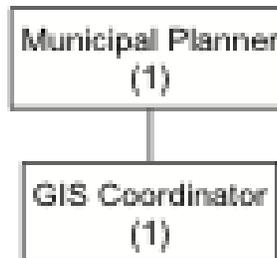
## 7. PLANNING OFFICE

### 1. DEPARTMENT SUMMARY

The Planning and GIS functions are responsible for providing state-mandated municipal land use regulation development and enforcement related to zoning and land development. The GIS function provides retrieval and mapping system for the municipal infrastructure, properties and facilities, and associated property related data. The overall organization, and number of authorized positions assigned to the Planning Office is shown in the table and chart that follow.

Function	Staffing by Classification	
Planning Office	Planner	1.00
	GIS Coordinator	1.00

#### Current Organization of the Mt. Lebanon Planning/GIS Office



## **2. DEPARTMENTAL STRENGTHS**

The project team compared the organization, operations, and management of the Planning Office to ‘best practices.’ This section highlights a number of key strengths with respect to the Planning Office and a general discussion of the operations. The points, which follow, present this discussion.

- The Planning Office is responsible for the implementation of all state-mandated land use regulation development and enforcement for zoning and land development functions.
- This office has a small staff – one municipal planner and one GIS Coordinator.
- The GIS Coordinator provides general oversight of the entire municipal GIS function including entry and coordination of all base-data and the development of new layers to support municipal department needs and operations. This position provides as needed training and support to other municipal departments relative to GIS utilization.

Overall, there were a number of strengths identified within the Planning Office. The include the following points:

- The Department maintains an updating program for the zoning ordinances and design review guidelines designed to support and enforce the “character of Mt. Lebanon”.
- GIS is available for use by staff of this Office and other municipal departments.
- An interdepartmental development review committee is utilized consisting of staff from the Planning Office, Inspection Office and the Municipal Manager. The committee meets weekly to review current applications and ensure a consistent municipal response to applicants regarding conditions of approval.

### **3. PRINCIPAL IMPROVEMENT NEEDS**

The project team identified a number of opportunities for improvement with respect to the management and operations of the Planning Office. The points, which follow, present a summary of the improvement opportunities.

- A formal multi-year work plan should be developed that identifies the municipal priorities on updating enabling legislation (such as zoning ordinance, design review guidelines, etc.).
- The GIS updating and expansion work program for the GIS Coordinator should be based upon an workplan developed in conjunction with all departments to prioritize the allocation of limited staff time to the development of the highest priority GIS layers.

Overall, the Planning Office is functioning with a minimal staff – with one individual responsible for all planning functions of the municipality and one individual handling all GIS functions. The limited staffing limits the ability achieve cost-savings through staff reductions but the municipality has a need to prioritize work activities to ensure that limited staff time is spent on the highest priority work activities.

### **4. SUMMARY OF RECOMMENDATIONS**

As a result of the project team’s analysis, the Municipality of Mount Lebanon should make several changes to the operations / work programs of the Planning Office. The recommendations are outlined in the following table:

<b>Issue</b>	<b>Analysis and Recommendations</b>	<b>Cost / (Savings)</b>
<p>Is there an adopted schedule for routine review and updating of critical enabling legislation (i.e. – Zoning Ordinance, Design Review Guidelines)?</p>	<p>A formal work plan should be developed to outline a multi-year plan of review and updating of enabling legislation including the zoning ordinance and design review guidelines. This plan should be developed in conjunction with the Council, the Planning Commission and the Municipal Manager to prioritize the schedule for review and updating. The work program should be integrated with the Municipal Planners on-going work program for long-range planning efforts.</p>	<p>None</p>
<p>Has a plan been developed of the highest priority needs for GIS system development to guide the allocation of limited staff time to meet the most critical needs of the municipality?</p>	<p>Staff has limited time available to develop new GIS layers and expand utilization of GIS software throughout the organization. A prioritization system should be developed, in conjunction with IT staff and operating departments, that clearly outline highest priority projects / layers for development.</p>	<p>None</p>

The detailed analysis of the above issues can be found in the following pages.

<b>PLANNING OFFICE</b> <b>Maintenance of Enabling Legislation</b>
--

<b>Issue:</b>
---------------

Is there a formal work plan adopted to provide a systematic review and updating of the Municipality's enabling legislation (including documents such as the zoning ordinance and design review guidelines)?
---

<b>Current Situation:</b>
---------------------------

The Planning Office does not have an adopted work plan that outlines a routine review and updating of the Municipality's enabling legislation including the zoning ordinance and design review guidelines. The Commission and staff have both identified the need for updating to the Zoning Ordinance.
---

**PLANNING OFFICE**  
**Maintenance of Enabling Legislation**

**Analysis and Discussion:**

An on-going and routine review of critical enabling legislation is a best practice for municipal governments to ensure that the major ordinances guiding development activities within the community are based upon current community desires and relevant conditions of approval. Best practices indicate at least a five year cycle for review of all aspects of the zoning ordinance. Additionally, design review guidelines should be reviewed every three to five years to ensure continued applicability and enable updating to ensure community standards are appropriate for the type of development activity that is occurring.

The Municipality of Mt. Lebanon has only one individual allocated to perform traditional planning functions. In addition to responsibility for long-range planning, this individual also serves as staff to the Planning Commission, maintains responsibility for review of current planning applications, and is responsible for the staff review and maintenance of all enabling legislation. In order to effectively utilize this individuals time and to provide guidance on Commission priorities, a formal schedule to review and update the zoning ordinance and design review guidelines should be developed.

The five year work plan should identify the specific components to be reviewed annually, and the level of review that will be required by the Planning Commission and the Municipal Commission to provide direction to staff on desired policy issues. The plan should be developed to provide a full review of the zoning ordinance - at least every five years – and the design review guidelines every three to five years.

**Recommendation:**

The work plan should be developed by staff, in conjunction with input from the Municipal Commission and the Planning Commission, to provide a complete review and updating of the zoning ordinance on a five year cycle. Additionally, the design review guidelines should be reviewed at least every three to five years.

**PLANNING OFFICE**

**A GIS work program should be developed.**

**Issue:**

Is there a defined approach and work plan developed and implemented to guide the expansion of the GIS system for use by additional departments (or to provide additional support to departments) and to identify the highest priority layers to be developed?

**Current Situation:**

The GIS system is currently maintained by one individual, the GIS Coordinator, who is responsible for maintenance of the base GIS layers and system data, provision of training to user departments, and the development / expansion of new layers and functionality to support operating department needs.

**Analysis and Discussion:**

There are a number of opportunities to improve the overall management, expansion and utilization of the municipalities GIS program; however, staff time available to develop this resource is limited. To guide the effort, a work plan should be developed that identifies the most critical components and functionality of the GIS system that should be developed by the GIS Coordinator. This plan should be developed with input from the IT staff and the recommended IT committee, departmental input, and input from elected officials. Key components of the plan should include:

- Identification of the base work required to maintain the base GIS layers;
- Outline of basic training to be provided to staff to enable operating department use of the existing system;
- Identification of all desired GIS layers by individual departments including a general description of availability of the data needed to develop, estimation of time to develop the layer, and identified use of the layer upon creation. These requested layers should be prioritized to provide a work plan for the GIS Coordinator. Highest priority should be given to those layers that provide: (1) use by multiple departments; (2) provide data suitable for use in reducing staff time; (3) are linked to the accomplishment of Commission goals / objectives; and (4) have an identified use / operational need.

**Recommendation:**

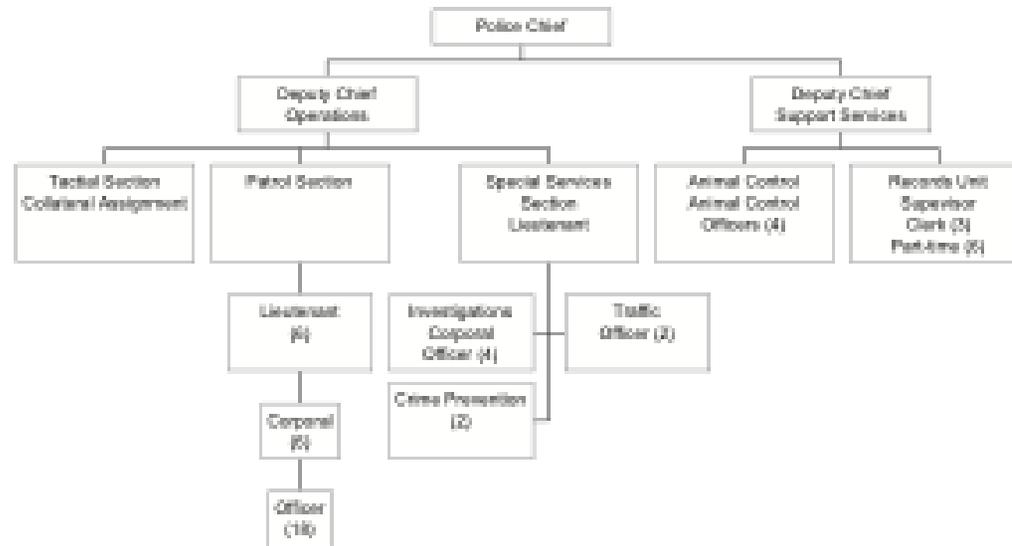
The Municipality should develop a GIS work plan that allocates the GIS Coordinator's available time for GIS system development to the highest priorities. The work plan should be developed with considerable input from operating departments, IT Staff, and elected officials to develop a multi-year plan focusing GIS development on highest value layers and functions.

## 8. POLICE DEPARTMENT

In the following section is provided the project team’s analysis of current operations, services and staffing issues in the Police Department.

### 1. DEPARTMENT SUMMARY

The Police Department is responsible for the enforcement of local and state laws. The Department provides patrol of the Municipality, crime scene response and investigation, proactive enforcement, crime prevention programming, property and evidence control, specialized response and other activities. The Department participates in a number of regional groups for SWAT, DUI enforcement, communications, and information technology (CAD/RMS) sharing.



## **2. DEPARTMENTAL STRENGTHS**

Based on the project team's review of the Police Department's organization, management, and operations, there are a number of areas where the Department meets or exceeds "best practices." These includes the following:

- The Police Department recently consolidated its dispatch services with the County. Dispatch centers in small municipalities are inherently inefficient due to the high capital costs and the need to maintain staffing levels sufficient to provide relief for dispatchers despite low workload levels.
- The Police Department is part of the South Hills Area Council of Governments and has utilized this organization to implement a number of regionalization strategies to mitigate the cost of services. This includes:
  - Utilization of a regional Special Response Team and Tactical Negotiations Team.
  - Utilization of a regional DUI taskforce to address targeted areas and provide additional enforcement.
  - Use of SCHAGOG to develop a regional animal control service funded by eight communities.
- The Support Division administers a Mobile Data Terminal server for 52 agencies in 6 Counties of Western Pennsylvania. In addition to providing revenue, the operation allows for instant communication between field units and provides access to PennDOT records via vehicle computers.
- The Department utilizes a number of crime prevention programs which target community problems including the adopt a business program aimed at improving communication and information sharing between the Police Department and local businesses, underage drinking presentations, anti-bullying programs, senior safety presentations, home and business security surveys, and other programs.

## **3. PRINCIPAL IMPROVEMENT NEEDS**

There were several issues identified in this study that need to be addressed by the Police Department. These include the following:

- In 2003, the Police Department modified its deployment of personnel on the midnight shift from 3 to 4 Officers. Based on the level of proactive time available within patrol, the previous approach to patrol deployment provides more than adequate officer time to handle calls for service and proactive enforcement. The Department should go back to the old approach, which would result in significant cost savings and still provide a high level of service.
- The current level of staffing within the Crime Prevention Unit does not support the use of two full-time positions. The Department should utilize overtime for those events, which require additional resources. This approach better matches resources to workloads and service commitments.
- There are additional case management tools that can be utilized to more effectively management caseload within the Investigative Services Unit.
- There are additional management tools that the Police Department should utilize to monitor the use of overtime and identify overtime drivers.
- The current level of traffic enforcement is below the recommended targets.

The next section provides the project team's recommendations for the Police Department.

#### **4. SUMMARY OF RECOMMENDATIONS**

As a result of the project team's analysis, the Municipality of Mt. Lebanon should make several changes to the Police Department. The Matrix Consulting Group makes the following recommendations:

<b>Issue</b>	<b>Analysis and Recommendations</b>	<b>Cost / (Savings)</b>
<p>In 2003, the Police Department modified its deployment of officers within patrol during the midnight shift. Analysis of workloads within patrol indicates that proactive time levels are above recommended targets.</p>	<p>The Police Department changed its minimum staffing target on the midnight shift from 3 Officer to 4 Officers. Though this was accomplished by transferring a detective, overtime appears to have increased as a result. Analysis of call for service workloads and officer availability indicates that proactive time, particularly on the midnight shift is well above recommended levels of 40 to 50%. However, in order to balance officer safety and productive time, the project team recommends that the Police Department modify its minimum-staffing plan slightly by reducing the minimum officer target on the midnight shift to 3. This approach better matches resources to workload while ensuring that a sufficient number of units are available for back-up. In addition, this approach will result in overtime cost savings, since the current staffing plan requires one additional position beyond the number authorized.</p>	<p>(\$196,213)                      Annually in salaries, benefits, and overtime</p>
<p>Current workloads and time commitments within the Crime Prevention Unit do not support two full time positions.</p>	<p>The total time commitments required for 2 Officer presentations and events was 102 hours in 2007. Overall, 718 hours were committed to delivering programs / presentations individually in addition to the 102 hours of presentations which required 2 officers. This level of workload can be more cost effectively handled using overtime.</p>	<p>(\$79,158)                      Annually</p>

<b>Issue</b>	<b>Analysis and Recommendations</b>	<b>Cost / (Savings)</b>
<p>The Investigative Services Unit does not utilize case management as effectively as it could to monitor workload.</p>	<p>The ISU uses case screening tools to prioritize cases and make assignments. In addition, a case status log is utilized by the supervisor to document cases. However, many of these cases are several months old with no indication of the last activity or prospects for solvability. Without this information, the supervisor is not able to get an accurate picture of the workload of each detective.</p> <p>The Police Department should adopt a policy that all open cases receive a supplemental report every 30 to document activity on a case. This includes a simple explanation of what activities have been performed within the past 30 days and additional leads for follow up. This change will allow the ISU to evaluate workload by investigator, better distribute caseloads, and focus efforts on higher priority, workable cases.</p>	<p>N/A</p>
<p>The Police Department does not utilize management reports, which identify the reasons for overtime.</p>	<p>During 2007, the Police Department reported “regular overtime” for field services of 284,545 out of a total of 354,981 for the Division. There is no additional information, which allows Department of Municipality Management to identify the cause of this overtime. For example, how much overtime was spent in order to maintain minimum staffing of 4 officers per shift, how much overtime was utilized for officer time spent handling calls that ran past their designated shift, how much overtime was utilized for training? Without this information, the Police Department and the Municipality cannot effectively determine how overtime is spent.</p> <p>The Police Department should track overtime usage by reason to better manage overtime spending.</p>	<p>N/A</p>

<b>Issue</b>	<b>Analysis and Recommendations</b>	<b>Cost / (Savings)</b>
The Police Department 's level of traffic enforcement is below the recommended range.	Research conducted by the Traffic Safety Institute suggests that the optimal level of traffic enforcement is 1:35 to 1:40 injury accidents to traffic citations and DUI arrests. Based on 2007 data, the Police Department's Traffic Enforcement Index is 1:30, slightly below the optimal range. The Police Department should utilize available proactive time within patrol to focus on traffic enforcement.	N/A

The detailed analysis of these issues can be found in the following pages.

**POLICE  
PATROL PROACTIVE TIME**

**Issue:**

Given call for service workload and the deployment of personnel, does the availability of proactive patrol time fall within the 40% to 50% range? Does the current minimum staffing plan for each shift provide targeted service levels?

**Current Situation:**

Patrol is responsible for proactive and reactive enforcement of local, state, and federal laws. The Patrol Section is headed by 6 Lieutenants who provide watch command duties for three shifts. All personnel work a rotating 4 days on 2 days off schedule. Patrol shifts run from midnight to 8:00 a.m. (midnight), 8:00 a.m. to 4:00 p.m. (daylight), and 4:00 p.m. to 12:00 a.m. (shift 3). There are four reporting areas or “beats” in the Municipality. There are 30 total Officers assigned to patrol including 6 Lieutenants and 24 Officers. Two officers are K-9 officers. Minimum staffing per shift is 4 Officers (including Corporals) and 1 Watch Commander. The Police Department recently changed minimum staffing on the midnight shift from 3 Officers to 4 Officers.

**Analysis and Discussion:**

While it would be useful to identify a “standard evaluative tool” of community staffing needs, the utilization of “officer per capita” or other general agency evaluations does not provide for an appropriate evaluation of field staffing needs, nor should it be used as a primary basis for the Municipality to measure the effectiveness of police services. For the following reasons the Matrix Consulting Group does not use an “officers per capita” ratio as an analytical tool in assessing field staffing needs.

- The “officers per capita” ratio does not consider the seriousness of the workload levels of the jurisdictions being compared. For example, the crime rate could be considered in any comparative analysis of workloads, specifically, the number of Part 1 and Part 2 Crimes in a community (e.g., homicide, rape, robbery, aggravated assault, burglary, motor vehicle theft, and larceny).
- The “officer per capita ratio does not consider a jurisdictions’ approach to alternative service delivery or “differential police response” such as the use of civilian personnel to handle community generated calls for

**POLICE**  
**PATROL PROACTIVE TIME**

service and other workloads. These resources impact the staffing levels of sworn personnel and maximizes the efficiency and effectiveness of sworn personnel to handle higher priority calls.

- The “officers per 1,000 ratio does not consider service level and service delivery differences between police organizations, (e.g. community-oriented or problem-solving oriented, reactive versus proactive, etc.). All of which add to the inability to compare the necessary number of field patrol personnel.
- The “officers per capita” ratio does not consider other operational differences that have an impact on staffing needs such as the use of civilians for non-emergency response, specialized enforcement units (e.g. community policing, bike patrol, street level proactive enforcement, traffic, etc.).

For these reasons, the Matrix Consulting Group does not use an “officers per capita” ratio as a way for our clients to measure its effectiveness in providing police services, nor a s determinant in developing staffing need. The Matrix Consulting Group uses a method in which the number of field personnel required is based on an analysis of unique workloads and service level requirements of the Municipality.

Patrol represents one of the areas of police operations that staffing and service levels can be clearly quantified. Several factors determine the level of patrol staffing required in a community. The following is a summary of the key elements of the staffing model as well as a brief discussion for each.

**Reactive Workload**

- Intended to be established by policy as between 50% and 60% of an officer’s net available time.
- This calculation takes administrative time, (i.e., shift availability factors) out before this calculation is made.
- The portion the workload is based on actual call for service workload, committed time (for all units) relating to all elements of patrol workload.

**Proactive Time Available**

- Targeted at between 40%-50% of total time (i.e., the time not reacting to community generated calls for service but rather uncommitted time).
- This needs to be adjusted to reflect the unusual amount of proactive time on the night shift.

## **POLICE PATROL PROACTIVE TIME**

### **Administrative Time**

- On-shift time that typically makes a patrol officer unavailable to respond to calls for service and is counted as unavailable time.
- Based on policy for meals / lunches and estimates for briefing, meeting time, miscellaneous time, court, etc.

### **Staff Availability**

- Approach that considers Officer availability to evaluate actual time spent on duty.
- This analysis also needs to reflect the demands of shift time not available for work (e.g., briefing, breaks, etc.).
- Finally, the analysis also needs to consider the impacts of position vacancy, recruiting to fill vacant positions, academy and field training, and continuing education.

The project team methodology is based on evaluating patrol staffing and time available to meet targeted service levels including: proactive policing, availability for immediate response, and targeted response times for high priority calls for service.

The mechanics for utilizing this methodology is as follows:

**Patrol Workload:** Involves two distinct components

- Response to community generated calls for service that involve one or more officers responding to a service request initiated by a citizen's call to the communication center.
- Officer initiated activities that occur based on an action taken by one or more officers to address a problem or potential problem observed in the field, but no generated by a service request call from a citizen. Examples of self-initiated activities are traffic stops, investigating a suspicious circumstance or person observed by the officer.

Based on information obtained from the Department's CAD system field patrol personnel responded to 15,627 community-generated calls from August 1, 2007 to July 31, 2008. This represents approximately 1.8 calls for service each hour. This excludes community-generated calls for service assigned to other units in the Department.

## POLICE PATROL PROACTIVE TIME

**Estimated Officer Time to Handle Community Generated Calls for Service:** The following components are included as follows:

- Travel time and on-scene time for the primary officer dispatched to a call.
- Travel and on-scene time for officers who respond to a call in a back-up role.
- Time required to write reports for those calls that generate reports.
- Time required to book and transport prisoners who are arrested as a result of calls for service.

Based on data developed from the Department's CAD system, Mt. Lebanon Patrol Units spent an average of 62.79 minutes per call for service including on-scene time, back-up, report writing, and booking and arrest time. The table, below, shows the breakdown of how this time was estimated:

Handling Time Primary Unit	28.94
Back-up Units per Call	0.61
Estimated Back up Time (@ 75% of primary)	21.71
Average Handling Time	42.18
Reports (Minutes per Call)	19.59
Arrests (Minutes per Call)	1.02
<b>Total handling</b>	<b>62.79</b>

Please note that report writing time was estimated based on 7,653 incident reports and an estimated time of 40 minutes per report. In addition, there were 265 arrests during this report, which the project team estimated to take 60 minutes to complete. The total time for these activities was divided by the number of calls for service to arrive at the per call figure.

### **Officer Availability:**

The project team utilized use of leave data collected from the Municipality's payroll system to document officer availability. Based on sick, vacation, and worker's compensation time taken during 2007, officers used an average of 83 hours of leave. This represents a net availability rate of 89% (i.e. Officers were available for work 89% of regularly scheduled hours).

**POLICE**  
**PATROL PROACTIVE TIME**

In evaluating patrol staff utilization it is also necessary to account for time not available to handle calls for service, accomplish self initiated activities during a typical shift. Factors contributing to shift time not available for the above include briefing time, time for meals and breaks, etc. The project team estimated that approximately 1.25 hours per shift are spent on administrative time including: 15 minutes for briefing, 15 minutes for general administrative / preventive maintenance activities, and 45 minutes for meals / breaks. In addition, time spent conducting training or in court must be accounted for to estimate actual on duty availability. Based on Department records, police officers spent an average of 72 hours conducting training over the past year. The project team also estimates that officers spend an average of 40 hours per year in court.

Based on the preceding factors, the project team estimated the amount of time available within patrol for proactive enforcement. The table, below, shows the results of this analysis:

	<b>Overall</b>	<b>0000 - 0800</b>	<b>0800 - 1600</b>	<b>1600 - 0000</b>
<b><u>Deployment</u></b>				
Actual On-Duty Staffing (Officers -- no supervisors)	14.01	4.67	4.67	4.67
Length of Shift (hours)	24.00	8.00	8.00	8.00
Total Gross Duty Time Available (mins.)	6,725	2,242	2,242	2,242
Less Breaks / Meals (1.25 hours / Officer)	(1,051)	(350)	(350)	(350)
Net Duty Time Available	5,674	1,891	1,891	1,891
<b><u>Reactive Workload Requirements</u></b>				
Average Number of Calls for Service per Hour	1.78	0.88	2.24	2.06
Committed Time (Travel, On-Scene, Reports, Arrests, etc. - All Units)	62.79	62.79	62.79	62.79
Direct Call Handling Time (mins.)	2,688.27	439.87	1,124.52	1,036.98
<b>Percentage of Time Committed to Reactive Workload</b>	<b>47.4%</b>	<b>23.3%</b>	<b>59.5%</b>	<b>54.8%</b>
<b>Total Proactive Time Available After Reactive Work</b>	<b>52.6%</b>	<b>76.7%</b>	<b>40.5%</b>	<b>45.2%</b>

As shown above, overall, patrol officers have approximately 52% of on duty, availability time for proactive enforcement. The table also shows that proactive time is within the recommended range of 40% to 50% during the daytime and afternoon/early evening hours. However, proactive time levels during the midnight shift are well above recommended targets – 77%. At this level, proactive time becomes difficult to manage, as the vast majority of officer time is not spent

**POLICE**  
**PATROL PROACTIVE TIME**

handling calls for service.

While the level of proactive time is an important measure of service levels within patrol, the project team also considers the need to maintain a basic level of officers on duty to provide for officer safety. While, on average, workloads result in high levels of proactive time, there is still a need to maintain a certain number of officers in the event that back-up is needed or major incidents occur. As a result, we compared the number of officers needed under three service level options: the current minimum staffing plan, the 45% proactive time level, and an alternative plan. The table, below, shows the results of this analysis:

Shift	Current Plan	45% Plan	Alternative
Midnight	4	2	3
Day	4	4	4
Swing	4	4	4
Daily Hours of Coverage	96	80	88
Annual Hours of Coverage	35,040	29,200	32,120
<b>Number of Officers Needed (with 5% turnover)</b>	<b>25</b>	<b>21</b>	<b>23</b>

As shown above, the current staffing plan calls for 25 officers, 1 more than currently authorized, while the 45% proactive time plan calls for 21 officers, 3 less than currently authorized. An alternative staffing plan requires 23 total officers, or 1 less than currently authorized. Please note that a 5% turnover factor was added to the number of officers needed to account for the time lost due to turnover and the time needed to recruit, academy train, and field train a new officer.

It is interesting to note that the current staffing plan requires 1 more officer than currently authorized by the Municipality. In order to meet the current plan, the Police Department must use overtime when fewer than 4 officers are available for duty. Based on the current hourly rate of a non-probationary police officer of \$31.34, the overtime cost for covering one additional officer positions to meet the current minimum staffing plan is \$97,780 annually.

**POLICE**  
**PATROL PROACTIVE TIME**

**Recommendation:**

Based on the current level of proactive time available within patrol, the Municipality can reduce the number of authorized police officer positions by 1. This approach provides for a minimum of 3 officers on the midnight shift, 4 officers on the day shift, and 4 officers on the swing shift. In addition, this approach is likely to save money on overtime costs associated with the current minimum-staffing plan. In total, the net cost savings from this change is \$196,213 annually (estimated overtime of \$97,780 annually + 65,187 base salary + 51% benefit rate).

**POLICE  
CRIME PREVENTION UNIT STAFFING**

**Issue:**

Is the current level of staffing dedicated to Crime Prevention programming in line with workloads and services provided by the Police Department?

**Current Situation:**

Two Officers are assigned to Crime Prevention. These personnel provide a number of crime prevention presentations to local schools, senior facilities, and community groups. These personnel also attend community meetings, recruiting fairs, neighborhood events, and other special events. These officers generally work daytime hours, although they will also work a flexible schedule to accommodate evening and weekend meetings and events.

**Analysis and Discussion:**

Given the size of the Department, it is unusual to have 2 full-time officers assigned to crime prevention programs. However, each agency utilizes its resources based on the service levels expected the community. As a result, the project team collected workload data to document the time commitments of various crime prevention programs and activities for the two officers assigned to the crime prevention unit. The tables, which follow, show the event or activity and estimated time commitment (which was provided by the crime prevention unit) for those activities that require one officer or two officers to attend.

As shown in the crime prevention event tables, the total time commitments required for 2 Officer presentations was 102 hours in 2007. In addition, there were another 78 hours of crime prevention program time for presentations made by either officer in 2007. Individually, the Corporal delivered 186 hours of programs or events attended, while the Officer delivered or committed 455 hours. Overall, 718 hours were committed to delivering programs / presentations individually in addition to the 102 hours of presentations which required 2 officers. It should also be noted that there are other activities that are not accounted for in this summary including: scheduling, meeting coordination, training, and other administrative assignments. However, the preceding analysis indicates that the current level of programming does not require 2 full-time personnel. Particularly for those events or programs, which require 2 or more officers, these activities

**POLICE**  
**CRIME PREVENTION UNIT STAFFING**

should be done on overtime or using available personnel within patrol.

Assuming that the half of the current workload within the Crime Prevention Unit is performed on an overtime basis (820 / 2), the project team estimates that approximately \$79,000 in salaries and benefits can be saved. This is based on:

Total Crime Prevention Program Hours	820
Half of Program Hours	410
Base PO (non probationary) Hourly Rate	31
Overtime Rate (@ 1.5 x base hourly)	47
Total Overtime	19,274
Full time Position Salary (Base PO)	65,187
Benefits (@51%)	33,245
Total Position Costs	98,432
<b>Net Savings</b>	<b>(79,158)</b>

The above calculation assumes that half of the current programming delivered by the Crime Prevention Unit is delivered on overtime. As a result, this is a conservative estimate since some of these hours may be able to be absorbed by the Crime Prevention Corporal or on duty patrol personnel.

**Recommendations:**

Based on the workload of current programs and services provided by the Crime Prevention Unit, the Municipality and the Police Department should eliminate the Officer position assigned to this unit. If additional officer time is needed to assist with crime prevention programs, this should be done on overtime. As a conservative estimate, this change would result in annual savings of \$79,158.

**Programs Presented with 2 CP Officers**

<b>Event / Program</b>	<b>2007</b>	<b>Approx. Time per Activity</b>	<b>Total Time (Hrs.)</b>
Safewalking Kindergarten	23	0.75	17.25
Safewalking 1st Grade	24	0.75	18
Stranger Safety 2nd Grade	24	0.75	18
Howe School Safety Fair	1	7.00	7
St. Clair Hospital Safety Fair	1	8.00	8
ML Employee Safety Fair	1	4.00	4
Bike Rodeos	3	3.00	9
Montessori School Child IDs	1	5.00	5
Howe School Stranger Safety Refresher	6	0.50	3
Galleria Safety Fair	2	5.00	10
KO Prom Promise	1	3.00	3
<b>Subtotal</b>	<b>87</b>	<b>N/A</b>	<b>102</b>

**Presentations by Either CP Officer**

<b>Event / Program</b>	<b>2007</b>	<b>Approx. Time per Activity</b>	<b>Total Time (Hrs.)</b>
Driver's Education	10	3	30
Child ID Cards	176	0.05	8.8
Patrol Follow-up	73	0.5	36.5
Summer Rec Camp Visits	5	0.5	2.5
<b>Subtotal</b>	<b>264</b>	<b>N/A</b>	<b>77.8</b>

**Presentations by CP Corporal**

<b>Event / Programs - Corporal</b>	<b>2007</b>	<b>Approx. Time per Activity</b>	<b>Total Time (Hrs.)</b>
DARE Jubilee School	10	0.75	7.5
DARE Montessori		0.75	0
MLHS Law in Action	2	0.75	1.5
Security Surveys	14	1	14
Car Seat Inspections	37	1	37
Preschool Visits	7	0.5	3.5
Police Station Tours	16	1	16
Boy / Girl Scout Presentations	7	1	7
Modified DARE Lesson	52	0.75	39
ID Theft/Scams for senior citizens	6	1	6
Bike Safety Classes	6	0.75	4.5
MRSTA Crime Scene Training	1	2	2
Crime Scene Processing	1	2	2
Temple Emanuel Child ID's	2	2	4
Lincoln Elementary ID's	4	2	8
Municipal Safety Meetings	8	1	8
Career Day Mellon Middle		0.75	0
Career Fair at Convention Center	1	8	8
Meeting at Sky Bank	1	1	1
PCCD Crime Prevention Course	1	2	2
Washington Road Bus Association Meet	1	1	1
Galleria Merchants - security meeting	1	1	1
PAUSA Meetings	2	1.5	3
Meeting with CSB merchants	1	2	2
Assist with Crossing Guard Camp	1	3	3
Job Fair Monroeville		8	0
National Night Out Please Hills	1	5	5
<b>Subtotal</b>	<b>10</b>	<b>N/A</b>	<b>186</b>

**Presentations by CP Officer**

<b>Presentations / Activities - Officer</b>	<b>2007</b>	<b>Approx. Time per Activity</b>	<b>Total Time (Hrs.)</b>
Sports Team alcohol consequences	32	0.75	24
Alcohol awareness	90	0.75	67.5
Orientation New Students Mellon Middle	2	3	6
Orientation New Students Jefferson Middle	2	3	6
Orientation New Students MLHS	1	3	3
PTA Meetings Internet Safety	3	1	3
Bullying	110	0.75	82.5
Cyber Bullying	64	0.75	48
Parent Ed Night Jefferson Middle	1	3	3
Parent Ed Night Mellon Middle	1	3	3
Sexual Harassment	64	0.75	48
Teacher in Service Drug Recognition	4	2	8
Teacher in Service Violence in Schools	4	2	8
DARE St. Bernard's	20	0.75	15
Career Day Mellon Middle	5	0.75	3.75
Career Day Jefferson	6	0.75	4.5
Junior Women's League Self Protection	1	2	2
Teen center at Middle Schools	2	3	6
Counseling of Juveniles	18	1	18
Car Seat Inspections		1	0
National Night Out Pleasant Hills	1	5	5
Job Fair Monroeville		8	0
PAUSA Meetings	12	1.5	18
ASAP Training	1	8	8
Safe Schools Conference	3	8	24
Bomb Threat Response at School	3	8	24
Ovweus Bullying Program MLHS	2	8	16
<b>Subtotal</b>	<b>40</b>	<b>n/a</b>	<b>454.25</b>

**POLICE DEPARTMENT**  
**Investigations Case Management**

**Issue:**

Does the Police Department effectively utilize case management techniques to prioritize cases assigned to investigators and manage workloads?

**Current Situation:**

The Police Department assigns a Corporal and 4 Detectives to the Investigative Services Unit. The Corporal is responsible for supervision of the three Detectives (currently 1 vacancy) including case assignment and follow-up. The Investigative Services Unit uses solvability factors to prioritize caseloads and make assignments. In addition, ISU uses an excel based case management system to track the status of cases. However, there are no policies in place, which require case status updates on a regular basis as a case management mechanism.

**Analysis and Discussion:**

Effective investigative case management requires a number of tools to assign, monitor, and actively manage case loads so that higher priority cases with workable leads receive the attention needed. Based on the project team's interviews with ISU personnel as well as review of caseload data, the Police Department does not actively monitor when cases were last worked, whether there continue to be workable leads, and then make decisions about whether a case should remain open or be inactivated. As indicated above, the ISU does utilize screening tools to prioritize cases and make assignments. In addition, a case status log is utilized by the supervisor to document cases. However, many of these cases are several months old with no indication of the last activity or prospects for solvability. Without this information, the supervisor is not able to get an accurate picture of the workload of each detective.

While a review of the case logs for each detective indicate that there are between 13 and 34 open cases with some activity, it is difficult to tell which cases merit additional follow up without regular supplemental reports from detectives.

**POLICE DEPARTMENT  
Investigations Case Management**

**Recommendation:**

The Police Department should adopt a policy that all open cases receive a supplemental report every 30 to document activity on a case. This includes a simple explanation of what activities have been performed within the past 30 days and additional leads for follow up. This change will allow the ISU to evaluate workload by investigator, better distribute caseloads, and focus efforts on higher priority, workable cases.

**POLICE DEPARTMENT**  
**Management of Overtime**

**Issue:**

Does the Police Department have effective management tools in place for tracking and managing the utilization of overtime?

**Current Situation:**

The Police Department and the Finance Department track overtime utilize as part of its quarterly financial reports. Overtime is tracked by Division / Unit and by type including: Regular overtime, holiday, court, special, and grant. However, the Police Department does not utilize overtime management reports, which describe the hours, costs, and reasons for overtime at the level of detail required to understand overtime drivers.

**Analysis and Discussion:**

The Police Department does not utilize management reports, which identify the reasons for overtime. For example, during 2007, the Police Department reported “regular overtime” for field services of 284,545 out of a total of 354,981 for the Division. There is no additional information, which allows Department of Municipality Management to identify the cause of this overtime. For example, how much overtime was spent in order to maintain minimum staffing of 4 officers per shift, how much overtime was utilized for officer time spent handling calls that ran past their designated shift, or how much overtime was utilized for training. Without this information, the Police Department cannot effectively determine how overtime is spent.

**Recommendation:**

The Police Department should track overtime usage by reason including, at a minimum: overtime needed to meet minimum staffing, training, calls for service holdover, special events, special details, etc.

**POLICE DEPARTMENT**  
**Traffic Enforcement**

**Issue:**

Is the Traffic Enforcement Index (citations and DUI arrests divided by injury accidents) in the 1:35/1:40 range?

**Current Situation:**

During 2007, the Department issued 2,551 hazardous traffic citations. During the same period, a total of 86 injury accidents occurred. The traffic enforcement index is 1:30, which is slightly below the recommended range.

**Analysis and Discussion:**

The primary purpose of traffic enforcement and selective enforcement units is to impact the number of accidents within the Municipality. Particular attention should also be paid to reducing the number of injury accidents and traffic fatalities that occur each year. Research conducted by the National Traffic Safety Institute and confirmed by additional research completed by traffic safety research organizations at Northwestern University and the University of California at Berkeley has indicated that there is a relationship between levels of, and changes in, citation volume and motor vehicle accident frequency. Based on this research, a measure of traffic enforcement effectiveness has been developed. This measure, termed the "Traffic Enforcement Index", compares moving citations and traffic warnings with injury accident frequency. The ratio is calculated as follow:

$$\text{Traffic Enforcement Index} = \frac{\text{Number of Moving Citations Issued + DUI Arrests}}{\text{Number of Injury Accidents}}$$

The research indicates that the optimum effectiveness range for the traffic enforcement index is 35 to 40 (i.e., ratio of 35 moving citations issued for each injury accident which occurs in the community). As traffic citations and DUI arrests increase, injury accidents decrease and the 35 to 40 ratio is the range in which enforcement activities have an 'optimum' impact.

**POLICE DEPARTMENT**  
**Traffic Enforcement**

**Recommendation:**

The Police Department should utilize available proactive patrol time to increase the level of traffic enforcement in the Municipality. As an example, in order to reach the recommended range of traffic enforcement, the Department would need to issue an additional 1.25 citations each day.

## 9. PUBLIC INFORMATION OFFICE

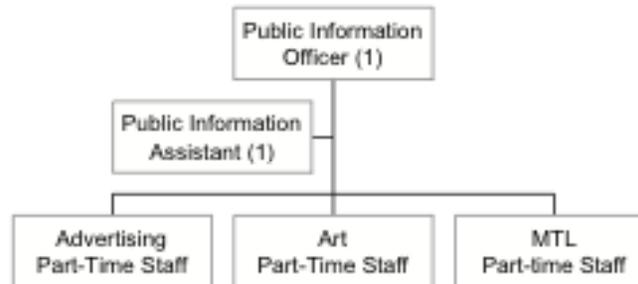
### 1. DEPARTMENT SUMMARY

The Public Information Office is responsible for producing the Mt. Lebanon magazine (MTL), staffing the information booth in the municipal building, coordinating marketing activities and event promotion, media relations, etc. This Office also operates the customer service center in the Municipal building. The Public Information Office is staffed as follows:

Function	Staffing by Classification	
Public Information	Public Information Officer	1.00
	Public Information Assistant	1.00
	Part-Time	Various

The plan of organization for the Public Information Office is presented below.

**Current Organization of the Public Information Office  
Mt. Lebanon, Pennsylvania**



**2. DEPARTMENTAL STRENGTHS**

The project team compared the organization, operations, and management of the Public Information Office to ‘best practices.’ This section highlights a number of key strengths with respect to the Public Information Office. This includes a discussion of the steps taken in the Office to reduce costs and increase the efficiency and effectiveness of operations. The points, which follow, present this discussion.

- The Public Information Office works with the Information Technology Office to ensure that the Municipality’s website is effectively utilized, provides relevant information and communicates the Municipality’s message, as appropriate.
- The Public Information Office is responsible for producing Mt. Lebanon Magazine of which there are ten editions annually. The magazine covers a variety of topics pertain to local residents. It is also partly supported by advertisement revenues.

- The Public Information Office has responsibility for coordinating publications and marketing materials for municipal departments. The Office is also in the process of developing a municipality-wide policy to further centralize responsibility.

The Public Information Office has centralized responsibility for public information and communication under its Office. Additionally, the Office utilizes part-time personnel to support its MTL Magazine productions.

### **3. PRINCIPAL IMPROVEMENT NEEDS**

The project team identified a number of opportunities for improvement with respect to the management and operations of the Public Information Office. The points, which follow, present a summary of the improvement opportunities.

- While the Public Information Office has begun to centralize public information activities, there are opportunities to further centralize responsibilities, including:
  - Formalization of the Public Information Officer's role to include review of issuance of department related communications;
  - Review and approval of marketing materials, including program catalogues, press releases, flyers, posters, etc.
  - Ability to work with departments to expand the content and use of their websites.
- Though it did so this past year, the MTL Magazine generally does not fully recover its cost of production through advertisement revenues.

#### **4. SUMMARY OF RECOMMENDATIONS**

As a result of the project team’s analysis, the Municipality of Mount Lebanon should make several changes to the Public Information Office. The Matrix Consulting Group makes the following recommendations:

<b>Issue</b>	<b>Analysis and Recommendations</b>	<b>Cost / (Savings)</b>
Is the production of the MTL magazine cost neutral?	The production of the Municipality’s MTL magazine should be cost neutral (i.e., supported by advertisement revenue).	(\$24,900)

The detailed analysis of the above issues can be found in the following pages.

**PUBLIC INFORMATION OFFICE**

**The MTL Magazine Generally Does Not Fully Cover Its Costs.**

**Issue:**

Is the production of the MTL magazine cost neutral?

**Current Situation:**

The Public Information Office is responsible for the production of the MTL magazine. This magazine has ten annual editions. The Public Information Officer is responsible for coordinating and approving part-time personnel, as well as contractual services for the production of the magazine.

**Analysis and Discussion:**

In the Municipality's 2008 budget, the Public Information Office estimated that the production of the MTL magazine covered approximately 94% of its costs. The PIO estimated a total cost of \$665,900 of which \$24,900 was subsidized from the general fund. The Public Information Office was able to bring in approximately \$641,000 in advertising revenue. The project team would expect a publication such as the MTL magazine would be cost neutral/

**Recommendations:**

The project team recommends that the production of MTL magazine be cost neutral. This should be done through an increase in advertisement revenue and / or a reduction in part-time personnel and / or contractual services.

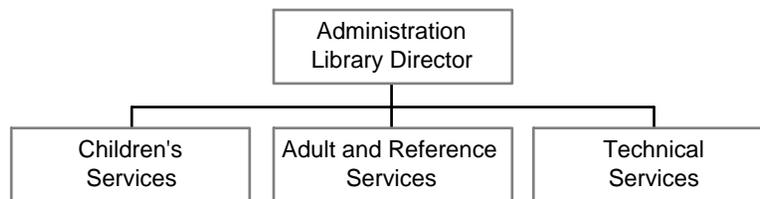
## **10. PUBLIC LIBRARY**

The Mt. Lebanon Public Library provides a wide variety of informational, educational, business, reference and recreational services to the community and region. It provides these services from a single location, currently on Castle Shannon Boulevard – dating from 1932, first supported by the Lion’s Club, then by the Mt. Lebanon Women’s Association. After legislation passed by the Commonwealth in 1961, the library became a public resource. The facility has grown in size several times over the period since its creation. A brief inventory of the services provided includes traditional and on line reference services, other computer and on line services (e.g., stand alone computers for word processing, etc., use of the internet), extensive children’s collection and reading programs, audio visual services (e.g., circulation and reference services for most AV including videos, DVDs, audiobooks, music CDs and learning foreign language materials, etc.). The Mt. Lebanon Public Library is a part of the Allegheny County Library Association and, as such, is part of a regional System. The Library has extensive special collections dedicated to documenting Mt. Lebanon’s business, social and cultural history; there are also several special needs collections. The Library is overseen by a five person Board of Trustees which is appointed by the Commission. The Library is open seven days per week during the school year; six days during the summer. It is also open four nights per week. In all, the Library operates 68 hours per week during the school year and 64 hours per week during the summer.

Funding is principally from the Municipality, though the State provides approximately 15% of revenue, and fines another 9%. A Friends of the Library group provides financial and other support to the library through book sales and their responsibility for the revenue stream associated with the audio visual collection (last year, they collected \$63,000 on behalf of the Public Library).

The Public Library has 27 FTE's, supplemented by approximately 5,000 volunteer hours each year. A functional organizational structure of the Mt. Lebanon Public Library is shown n the following page.

**Current Organization of the Public Library**  
**Mt. Lebanon, Pennsylvania**



**2. DEPARTMENTAL STRENGTHS**

The Mt Lebanon Public Library is a special resource to the community – it exceeds virtually every library service benchmark utilized by the project team and exceeds the performance of regional and national libraries. Indications of its performance are provided in the following dot point:

- Cardholders exceed 75% of the population. This is particularly impressive given the fact that all expired cards were purged in 2007.

- Circulation per cardholder exceeds 19 per person. Circulation per cardholder is more than 58% above the benchmark target.
- The collection, at 175,302, represents a level 5 times greater than the population. Given ongoing efforts to weed out older and non-circulating materials this is impressive.
- The Library has extensive cooperative efforts with the Municipality's schools as it relates to projects as well as special needs populations. The Library also partners with the Municipality's recreation services. It partners with the business community for web design and other activities.
- As with many libraries, the Mt. Lebanon Public Library is rich in children's programs. However, extensive programs are also directed at young adults, adults, special needs and special interest populations (e.g., genealogy, local history). In all there are over 1,300 program elements offered. The Library has speakers' series, puppet shows, pet shows, and other areas of non-traditional programming.
- There is a Homebound service which is provided through the use of volunteers. There are also deposit collections for various institutions which are also coordinated by volunteers.
- The catalog is electronic and regional; the Library subscribes to a number of electronic databases (e.g., business, genealogical, history, etc); the library offers 52 public computer terminals (on T-1 lines) for internet research as well as to work and print work; reference questions can be answered on the internet (or via e-mail).
- The Library extensively applies for and has been successful in securing grants. In the past year this has included the State Keystone Grant (\$167,000 which is matched by the Municipality) and DCED grants totaling \$35,000.
- Staff receive training every year in new services and refreshers on existing services.
- The Library surveys customers on a regular basis.

These are just a few of the exception ways in which the Mt. Lebanon Public Library excels at providing service to the community and the region.

### **3. PRINCIPAL IMPROVEMENT NEEDS**

The cost effectiveness of library services is determined by the way it meets established and appropriate service objectives with the right balance of staff for the facilities utilized. Because library service costs are determined commitments to service hours, there are no cost reductions possible without significantly changing the level of service. The fact that staffing levels are supplemented by a significant number of volunteer hours contributes to an environment of focus on cost effectiveness within the service level selected and traditionally supported by the community.

The project team identified a single improvement opportunity for the Mt. Lebanon Public Library. The Library is one of only six libraries in the County which is not organized as a municipal department or as a not for profit organization. Evaluation of the Mt. Lebanon Public Library's organization within the Municipality may not offer additional opportunities to raise revenues. However, its organization as a not for profit would confer advantages in terms of its ability to raise funds privately through contributions, some grants, etc. Because of the economies offered in pooled insurance and other costs, this should be accomplished, if possible, while retaining the Library's status as a Municipal function.

### **4. SUMMARY OF RECOMMENDATION**

As a result of the project team's analysis, the Municipality and the Mount Lebanon Public Library should evaluate changing its organizational structure to a 501c3 not for profit organization in order for it to avail itself of additional fundraising opportunities.

## 11. PUBLIC WORKS DEPARTMENT

### 1. DEPARTMENT SUMMARY

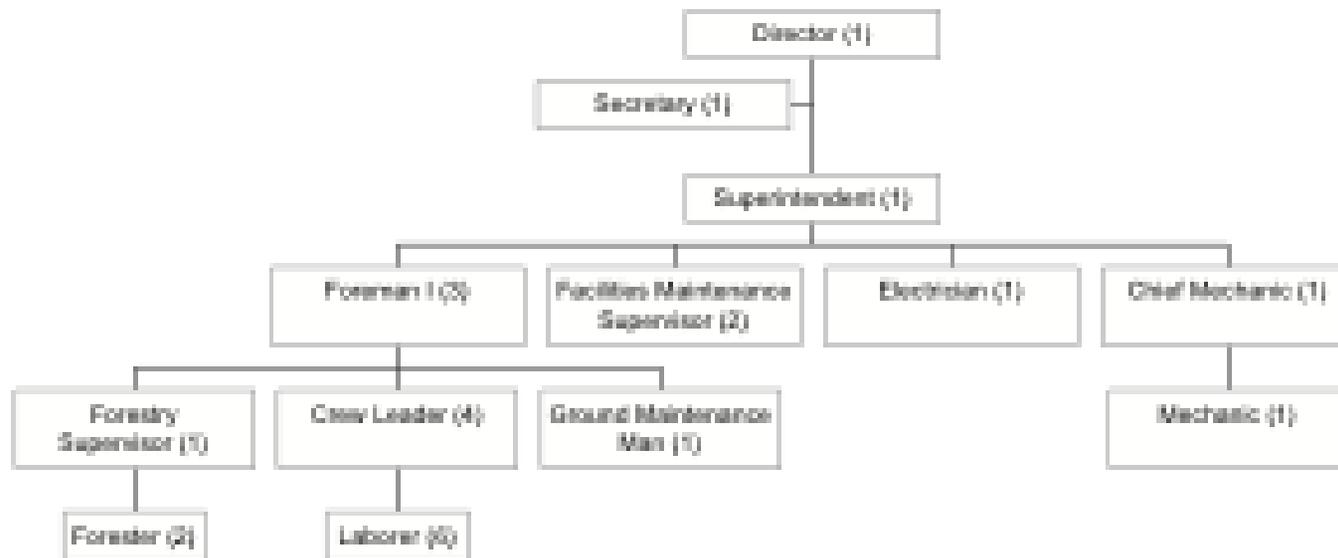
The Department of Public Works is responsible for the maintenance and management of the Municipality’s infrastructure, including roads, trees, grounds, storm mains, sanitary sewer mains, etc. The Department is also responsible for the maintenance and repair of the Municipality’s facilities, signalized intersections, vehicles and equipment and contract oversight (i.e., solid waste, mowing, building maintenance, custodial services, etc.). The Department provides routine services to the community, such as sidewalk inspections, tree planting, snow and ice control, street sweeping, lead vacuuming, etc.

Function	Staffing by Classification		Function	Staffing by Classification	
Administration	Director	1.00	Facilities	Facilities Maintenance	2.00
	Superintendent	1.00		Supervisor	1.00
	Secretary	1.00		Electrician	
Operations	Foreman I	3.00	Forestry	Forestry Supervisor	1.00
	Crew Leader	4.00		Forester	2.00
	Ground Maintenance	1.00			
	Laborer	6.00			
Fleet	Chief Mechanic	1.00			
	Mechanic	1.00			

These positions are organized as follows:

**Current Organization of the  
Department of Public Works**

**Mt. Lebanon, Pennsylvania**



## **2. DEPARTMENTAL STRENGTHS**

The project team compared the organization, operations, and management of the Department of Public Works to ‘best practices.’ This section highlights a number of key strengths with respect to the Department of Public Works. This includes a discussion of the steps taken in the Department to reduce costs and increase the efficiency and effectiveness of operations. The points, which follow, present this discussion.

- The Municipality has centralized services with respect to the repair and maintenance of the Municipality’s infrastructure, facilities, fleet and grounds. The Department of Public Works is responsible for all maintenance and

infrastructure management in the Municipality and has organized its services around the delivery of core functions needed in the Municipality.

- The Department has taken a number of steps to reduce costs, while maintaining service levels. This includes the contracting out of various services, such as grounds maintenance, sanitary sewer main replacement and televising, solid waste collection, etc.
- The Department has implemented a number of management systems to ensure the effective management of Department operations. These systems include an annual goals and objectives report, pavement management system, etc.
- The Department has implemented a number of proactive programs, such as televising sewer mains, cleaning catch basins, completed sidewalk inspections and replacement.
- The Department has contracted out a number of services, including some facilities maintenance, engineering services and road maintenance, reconstruction and paving.

Overall, there a number of strengths within the Department of Public Works, which has taken a number of steps to reduce cost while maintaining service levels.

### **3. PRINCIPAL IMPROVEMENT NEEDS**

The project team identified a number of opportunities for improvement with respect to the management and operations of the Department of Public Works. The points, which follow, present a summary of the improvement opportunities.

- While there a number of management systems in place, there are opportunities to strength the tools available to decision makers, including performance data related to staff utilization and allocation (e.g., work orders by service request, scheduled versus unscheduled work, grounds maintenance activities, etc.), preventive maintenance activities and asset management.

- Additionally, there are opportunities to expand personnel management and support in the Department. For example, the Department lacks an employee handbooks, policies and procedures manual and does not conduct formal training needs assessments of staff.
- There are narrow spans of control with one-over-one reporting relationship between the Director and Superintendent, 1:7 ratio of supervisors to employees and 1: 4.6 ratio of foreman to line position.
- Fleet management has not been centralized. While the Department of Public Works is responsible for the maintenance of the Municipality's fleet, operating departments are responsible for the management of their fleet (i.e., replacement guidelines, specification development and acquisition, etc.)
- There are opportunities to develop and formal programs to ensure effective utilization of personnel, including proactive tree-trimming, preventive maintenance on vehicles, inventory control and management, etc.

The project team developed a number of recommendations based on the review of the Department of Public Works and the best practices comparison. This is presented in the following section.

#### **4. SUMMARY OF RECOMMENDATIONS**

As a result of the project team's analysis, the Municipality of Mount Lebanon should make several changes to the Department of Public Works. The Matrix Consulting Group makes the following recommendations:

<b>Issue</b>	<b>Analysis and Recommendations</b>	<b>Cost / (Savings)</b>
Are fleet management programs centralized?	Centralize the management of the Municipality's fleet. DPW should be responsible for setting Municipality-wide policies, replacement guidelines and coordination and sharing of the fleet.	

<b>Issue</b>	<b>Analysis and Recommendations</b>	<b>Cost / (Savings)</b>
Is staffing for fleet maintenance adequate.	The project team analyzed the Municipality's fleet. Given the mix of in-house and contracted work, the project team recommends the reduction of a fleet maintenance position from 1.0 to 0.5 FTE hours.	(\$51,739)
Does the Department have the right staffing levels given the mix of in-house and contract work?	The project team recommends the elimination of 1.0 laborer position. The Municipality eliminated 1.0 FTE in its 2009 – 2010 budget. As a result, the project team recommends the elimination of a second laborer.	(\$61,316)

The detailed analysis of the above issues can be found in the following pages.

**DEPARTMENT OF PUBLIC WORKS**  
**Centralize Fleet Management Programs.**

**Issue:** Is there a comprehensive fleet management program in the Municipality?

**Current Situation:**

While the Department of Public Works is responsible for the maintenance of the Municipality's Fleet, responsibility for the management of the Municipality's fleet is decentralized. Operating departments are exclusively responsible for making decisions relating to their fleet, including specifications, acquisition, deadlining vehicles, etc. There are two FTEs responsible for the maintenance of the Municipality's fleet, including preventive maintenance, repairs and coordinating outsourced repairs.

**Analysis and Discussion:**

There are two fulltime equivalents responsible for the maintenance and repair of the Municipality's fleet. While maintenance and repair activities are performed by the Department of Public Works, there are a number of gaps with respect to Municipal-wide management of fleet, including:

**DEPARTMENT OF PUBLIC WORKS**  
**Centralize Fleet Management Programs.**

- Municipality-wide policies and procedures relating to fleet management, including formal, written, replacement cycles for vehicles by class and use, fleet assignment, justification, etc.
- Fleet maintenance does not operate as an internal service fund. Fleet users are not charged back the cost of maintaining the fleet to promote cost controls.
- Formal training on fleet related issues, such as defensive training, operator safety, etc.
- Employees drive to all their meetings instead of using local modes of transportation or pool vehicles. A short trip to an all day meeting means a vehicle has less utilization.
- Inadequate maintenance programs. This means excessive downtime for vehicle repairs and requires a larger fleet to provide replacement vehicles for drivers.
- Unresponsive to changing technology and working conditions. Retaining vehicles that are not suited to the work requirements may increase fleet costs and reduce worker productivity.

There are a number of consequences to a municipality if actively monitoring and analysis of the municipality's fleet is not done. For example, it can result in the following issues:

- Highly decentralized vehicle assignment policies- vehicles and equipment are owned and maintained by numerous independent units of a municipality.
- Vehicles that are assigned to individuals rather than used as a pool vehicle decrease vehicle utilization.
- Determining the Municipality's fleet size based on peak demand. Fleet operations that meet 100% demand in the middle of the week may have many idle vehicles at the beginning and end of the week.

**DEPARTMENT OF PUBLIC WORKS**  
**Centralize Fleet Management Programs.**

**Recommendation:**

The project team recommends that the Department of Public Works assume responsibility for the management of the Municipality's fleet, as well as its continued maintenance. The Department of Public Works should be responsible for the following:

- Managing equipment utilization, in consultation with operating departments, with a view toward reduction of the size of the fleet, expansion of the Municipal pool, and sharing of equipment among departments. Submits recommendations for reduction of the fleet for management approval.
- Developing equipment utilization guidelines, capturing equipment utilization data, assuring the accuracy of that data, evaluating equipment utilization abnormalities, and managing equipment re-assignment or disposal. This would be accomplished in consultation with operating departments that are assigned this equipment.
- Controlling vehicle assignments, in consultation with operating departments, to assure vehicles are assigned only when warranted, balancing utilization levels with departmental need, evaluating alternatives to the assignment of vehicles including management of privately owned vehicle use reimbursement and take-home vehicle management.
- Providing a Municipality-wide driver training program and makes recommendations to management of operating departments regarding control of abuse of equipment. This includes operator certification and record keeping, operator training, pre-trip inspection and record keeping, equipment misuse / abuse management, and accident reporting, investigation and management.
- Directing an equipment replacement program, in consultation with operating departments, and submitting municipal-wide replacement recommendations for management approval. This includes preparing equipment replacement guidelines and submitting these guidelines for management approval.
- Controlling the size of equipment within the fleet, "downsizing" equipment wherever appropriate and possible, in consultation with operating departments.
- Determining the level of service provided in house, coordinating all external / out sourced services, managing contractors, vendors, etc.
- Developing municipal-wide fleet related policies, including replacement, take-home, use, assignment, etc.

**DEPARTMENT OF PUBLIC WORKS**

**Reduce 1.0 FTE to 0.5 FTE in the Fleet Maintenance Division.**

**Issue:** Is there sufficient staff to adequately maintain the Municipality's fleet?

**Current Situation:** There are 2.0 FTEs responsible for the maintenance and repair of the Municipality's fleet. This includes the Chief Mechanic and Mechanic positions. The Fleet Maintenance Division is responsible for the preventive maintenance and repair of the Municipality's fleet. While the Division handles the majority of the Municipality's fleet, there are a number of significant activities that are performed by outside vendors, including services that the Division does not have the equipment or expertise to perform (e.g., transmission overhauls, auto-body work, etc.)

**Analysis and Discussion:**

To assess the capacity of the Fleet Maintenance Division to maintain and repair the Municipality's vehicles and other equipment, staffing levels were analyzed using vehicle equivalency units (VEU). The principle of vehicle equivalent units expresses each piece of equipment in terms of its equivalent or counterpart expressed in a common unit of measure, in this case a standard fleet sedan, which is given a baseline VEU value of 1.0. All other types of equipment are assigned a VEU value in terms of their relationship to a standard fleet sedan. For example, a forklift would be given a rating of 0.25 VEU, meaning that it would require one-quarter the effort to maintain as a standard automobile. Conversely, a complex and maintenance-intensive piece of equipment, such as a fire engine, would require the same effort to maintain as 8 standard sedans. By aggregating all of the vehicles in a fleet in terms of their vehicle equivalent units, uniform standards and benchmarks can be applied regardless of the fleet's size, type, or configuration. The Matrix Consulting Group reviewed the Municipality's fleet inventory to determine its vehicle equivalency.

When the maintenance and repair workload was calculated using vehicle equivalency units, the total VEU's amounts to 185.2. This is a "snapshot" of the Municipality's fleet as it exists at the present time. The amount of workload one mechanic should be capable of handling is 110 units depending on the age and condition of the fleet. This would result in the 1.68 FTEs.

**DEPARTMENT OF PUBLIC WORKS**  
**Reduce 1.0 FTE to 0.5 FTE in the Fleet Maintenance Division.**

**Recommendation:**

Given the mix of in-house and contract work performed by the Fleet Maintenance Division, the project team recommends the reduction of fleet maintenance personnel by 0.5 FTE. The Department should utilize a part-time position to augment the work performed by the 1.0 FTE, particularly as it relates to seasonal preparation of vehicles and equipment. This would result in the following:

- Elimination of 1.0 Foreman I position – assumes a cost savings of (\$80,859, which assumes a base pay of \$28.17 per hour and a 38% benefit rate).
- Authorization of part-time hours. This position should be utilized to assist the Chief Mechanic in two ways: (1) during peaks in workload (i.e., seasonal preparation of equipment such as snow plows, leaf trucks, etc.) and for light preventive maintenance activities (i.e., oil and filter changes, fluid changes and lubrication, etc.). The Department should be authorized 1,040 hours for part-time staff (an average of 20 hours per week). The project team assumes a net hourly cost of \$28.00 per hour or an annual cost of \$29,120. This is a net savings of (\$51,739).
- Further, the Ground Maintenance Man position duties and responsibilities include repair and maintenance of vehicles and equipment. During winter months, in addition to snow plow removal, this position should be utilized to provide assistance to the Chief Mechanic, as needed.

<b>DEPARTMENT OF PUBLIC WORKS</b> <b>Eliminate 1.0 Laborer.</b>
--

<b>Issue:</b> Does the Department of Public Works have the right balance of staff given its current level of service and service delivery model?
--

<b>Current Situation:</b> The Department of Public Works is staffed with 25.0 fulltime equivalents. The Department is responsible for a diverse set of services, including the maintenance and repair of the Municipality's parks and grounds facilities, roads, sanitary sewer mains, sidewalks, trees, fleet, solid waste, etc. The Department utilizes both in-house resources, as well as contracts for services. The Department focuses on responding to citizen and Municipality requests for services and providing a core set of services, such as leaf collection, tree trimming and planting, etc. It should be noted that the Municipality has just eliminated 1.0 position in the current budget. As a result, the project team recommends the elimination of a second position.
--

**DEPARTMENT OF PUBLIC WORKS**  
**Eliminate 1.0 Laborer.**

**Analysis and Discussion:**

As noted, the Department of Public Works provides a variety of services to the Municipality of Mount Lebanon. The table, which follows, presents a summary of the infrastructure maintained and services provided by the Department of Public Works. The data are from the Department’s 2007 Outcomes report. Presented below are the data for the Municipality of Mount Lebanon regarding transportation infrastructure.

<b>Category</b>	<b>Number</b>
Total Lane Miles of Roads	162 lane miles
Lane Miles Resurfaced	3 lane miles
Lane Miles Reconstructed	1.5 lane miles
Lane Miles Treated with Rejuvenator	6.5 lane miles
Brick Streets Reconstructed	7,896 square feet
Snow Removal (Labor Hours)	2,553 labor hours
Total Miles of Sidewalk	75 miles
Miles of Sidewalk Repaired	1.5 miles
Streetlights Maintained	1,413
Traffic Signals Maintained	41
Traffic Signals	1
Traffic Signs Maintained	3,500
Crosswalks Painted	60

**DEPARTMENT OF PUBLIC WORKS**  
**Eliminate 1.0 Laborer.**

**Analysis and Discussion:**

In addition to the transportation infrastructure, the Department is responsible for the maintenance of the Municipality's sanitary and storm water infrastructure. The table, below, presents the data.

<b>Category</b>	<b>Number</b>
Total Miles of Sanitary Sewer Pipes Maintained	160 miles
Miles of Pipes Inspected and Cleaned	26.7 miles
Point of Repair Completed to Damaged Pipe	269
Linear Feet of Repairs Made to Damaged Pipe	2,182 linear feet
Liner Repairs Made to Damaged Pipe	78
Linear Feet of Damaged Pipe Lined	13,059 linear feet
Linear Feet of Root Damaged Pipe Treated	9,007 linear feet
Total Miles of Storm Water Pipe Maintained	75 miles
Total Number of Storm Inlets Maintained	2,500
Catch Basins Cleaned	1,278
Catch Basins Rebuilt	2

The Department is responsible for providing a number of environmental services, including overseeing the contract for solid waste removal, recycling, forestry, field maintenance, planting and mowing, leaf removal, street sweeping, etc. The table, which follows, presents the data for the environmental services for 2007.

<b>Category</b>	<b>Number</b>
Number of Trees Maintained	10,000
Tree Trimming Service Request	380
Unhealthy & Hazardous Trees Removed	118
New Trees Planted	194
Athletic Fields Maintained	18
Parks Maintained	15
Parklets and Traffic Islands Maintained	59
Planting Areas Maintained	90
Cubic Yards of Leaves Collected	18,055 cubic yards
Cubic Yards of Debris Collected	12,000 cubic yards

**DEPARTMENT OF PUBLIC WORKS**  
**Eliminate 1.0 Laborer.**

**Analysis and Discussion:**

The points, which follow, present a discussion of the workload, staffing and service levels in the Department of Public Works.

- The project team analyzed staffing by core service area. This included street sweeping, leaf vacuuming, pothole patching, catch basin cleaning, sewer main back up, etc.
- The project team reviewed the inventory managed by the Department of Public Works, including lane miles, catch basins, signs, street sweeping and leaf vacuuming. Utilizing assumptions developed by the project team for each of these core service areas, the project team projected labor hours required maintaining the infrastructure at the Department’s current level of service. This included the inventory, projected annual work quantity, average daily output, crew size requirements, resulting in total annual staff days required.
- The analysis also included assumptions regarding miscellaneous work assignments, such as emergency response and repairs, specialized projects, snow removal, etc.

The table, which follows, presents the project team’s estimate of staff days required to perform core services.

<b>Item</b>	<b>Staff Days</b>
Street Sweeping	270
Pothole Patching	100
Catch Basin Inspections and Cleaning	219
Sign Inspections and Repair	185
Sidewalk Inspections	18
Snow Removal	399
Construction Projects and Activities	733
Misc. Activities	800
<b>Total Staff Days</b>	<b>2,724</b>

**DEPARTMENT OF PUBLIC WORKS**  
**Eliminate 1.0 Laborer.**

**Analysis and Discussion:**

Item	Staff Days
Annual FTE Hours (7.5 Work Hours per Day)	1,950
Availability (Less Breaks, Training, Leave Time)	85%
Net FTE Hours	1,658
Total Staff Days per FTE	221
<b>Total FTEs Required</b>	<b>12</b>
<b>Total Current FTEs (excluding facilities and forestry)</b>	<b>14</b>
<b>Plus / Minus FTEs</b>	<b>(2)</b>

The Department of Public Works has sufficient staff to continue with the provision of services should it eliminate 2.0 positions. The Municipality has just eliminated 1.0 laborer position as part of its Fiscal Year 2009 – 2010 budget process.

**Recommendation:**

Given the mix of in-house and contract services, as well as the staffing analysis and review, the project team recommends the elimination of 1.0 laborer position. This is in addition to the elimination of 1.0 FTE in the 2009 – 2010 budget. The net fiscal impact of this recommendation is presented below.

Category	Laborer
Average Salary of Existing Employees (2008 Base Pay)	\$44,432
Benefit Rate	38%
Benefit Costs	\$16,884
<b>Net Fiscal Impact</b>	<b>(\$61,316)</b>

The net savings for the elimination of a laborer position is \$61,317, based on the average of 2008 base pay for laborers and a 38% benefit rate.

## **12. RECREATION DEPARTMENT**

### **1. DEPARTMENT SUMMARY**

The Recreation Department is responsible for the provision of all recreation facilities and programs within Mt. Lebanon. The Department has five major function areas including Management, Recreation Center, Golf, Tennis and Recreation Programs. The Management function is responsible for oversight of all recreation programs and recreation facilities. Additionally, the Department is responsible for coordinating the usage and scheduling of all park facilities.

The Recreation Programming Division provides seasonal programming for the citizens of Mt. Lebanon. Programming includes a variety of athletic, instructional and cultural programs on a year-round basis for all age groups. Most programs are staffed through the use of part-time or contract employees. Programs are provided at the recreation facility and at various school district facilities. The Recreation Center facility provides two indoor ice skating rinks with programming for public skating, hockey and figure skating programming. The Center also operates a nine-lane Olympic sized outdoor swimming pool. The pool is equipped with separate diving and wading areas, and slides with a separate wading pool for young children.

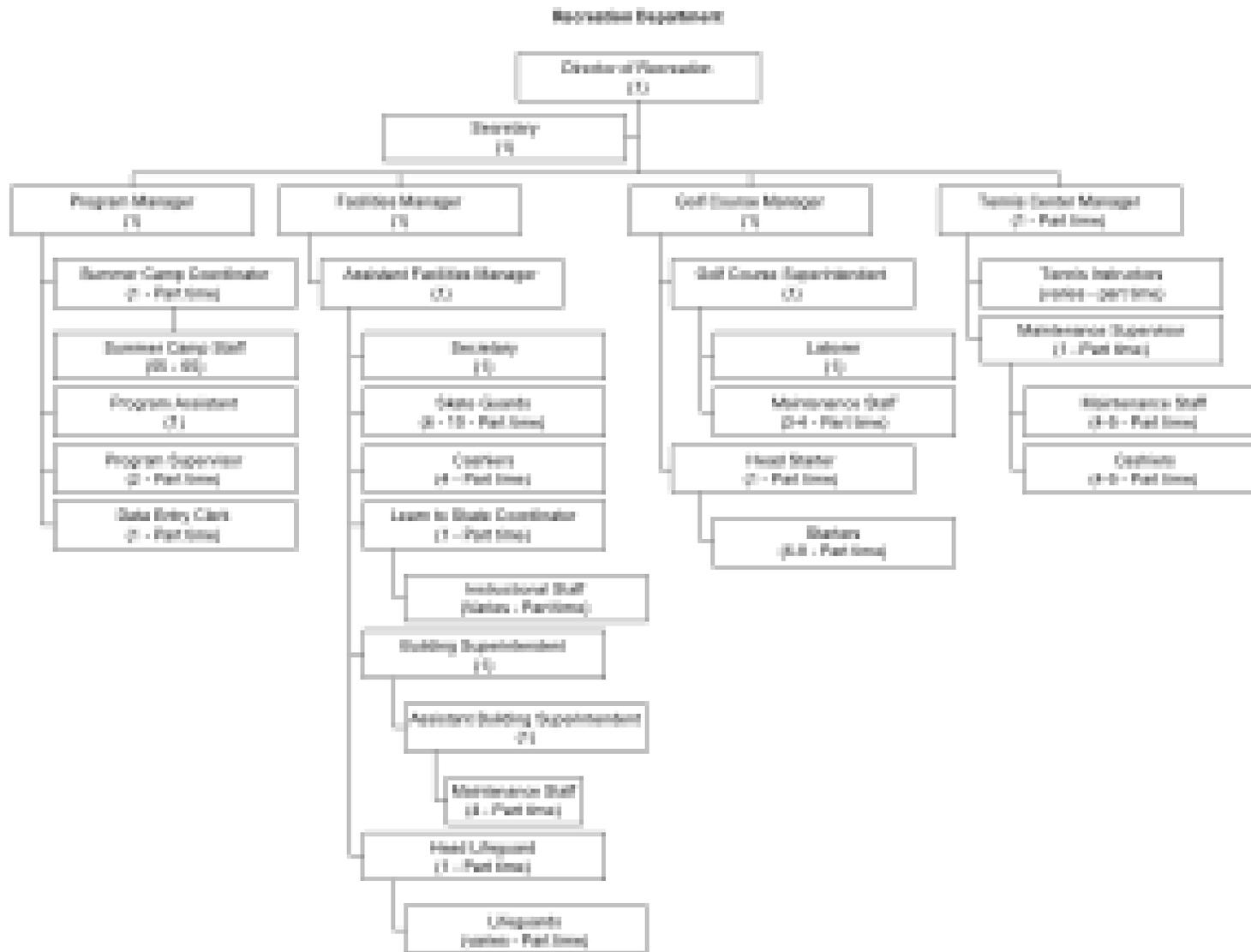
The Golf Division is responsible for the operation and maintenance of a 9 hole municipal golf course. The golf course is operated seven days per week year-round based upon weather with the primary season operating approximately May 1<sup>st</sup> through mid-September.

The Tennis program is responsible for the operation of the municipal Tennis Center, which includes 15 fast-dry courts and four platform tennis courts. Staff is responsible for scheduling of courts, accepting payments, performing general maintenance, and overall operation of the facility center. A small pro shop is operated at the Tennis Center. Staff provides instructional programming. The overall organization, and number of authorized positions assigned to the Recreation Department is shown in the table and chart that follow.

Function	Staffing by Classification	
Recreation Administration	Director	1.00
	Secretary	1.00
Recreation Programming	Program Manager	1.00
	Program Assistant	1.00
	Program Supervisor (part time)	.75
	Program Supervisor (part time)	.25
	Data Entry Clerk (part time)	.50
	Summer Camp Coordinator (pt)	.50
	Summer Camp Staff	Varies
Recreation Center	Facilities Manager	1.0
	Assistant Facilities Manager	1.0
	Secretary	1.0
	Skate Guards (part time)	6 – 10
	Cashiers (part time)	4.0
	Learn to Skate Coordinator (pt)	1.0
	Instructional Staff (part time)	Varies
	Building Superintendent	1.0
	Assistant Building Superintendent	1.0
	Maintenance (part time)	4.0
	Head Lifeguards (part time)	1.0
	Lifeguards (part time)	Varies

Function	Staffing by Classification	
Golf	Manager	1.0
	Head Starter (part time)	1.0
	Starters (part time)	Varies
	Golf Course Superintendent	1.0
	Laborer	1.0
	Maintenance (part time seasonal)	3 to 4
Tennis	Manager (part time)	1.0
	Tennis Instructors (part time)	Varies
	Maintenance Supervisor (pt)	1.0
	Maintenance (part time)	4 to 5
	Cashiers (part time)	4 to 5

The Recreation Department is organized as follows.



## **2. DEPARTMENTAL STRENGTHS**

Based on the project team's review of the Recreation Department's organization, management, and operations, there are a number of areas where the Department meets or exceeds "best practices." These includes the following:

- Program schedules are developed quarterly based upon an internal review of program suitability for the community. Specific marketing plans are developed for selected programs such as hockey.
- Registration is conducted in a variety of methods to serve residents – including mail in, walk in, phone and on-line registrations.
- The Recreation Department has an adopted cost-recovery goal of 100% of costs. The Department tracks program costs and revenues by major functional area (Tennis, Golf, Recreational Programs, and Recreation Center).
- Sponsorships are utilized to support specific programs such as special events and youth sports programs.
- A Parks Advisory Board was established in 1997 to provide guidance and input into operations of the Parks & Receptions efforts of the municipality.
- The Department participates in the Municipalities annual capital program budgeting to identify and plan for major facility and equipment needs.
- A written agreement is in place regarding joint use of school facilities to provide space in support of recreational programs.
- The Department makes extensive use of part-time and seasonal staff to support program provision. Many reductions in full-time staffing have been implemented to control costs including the proposed elimination of the Assistant Recreation Center Manager and the Golf Laborer position in the current budget. Overall, full-time staffing has been reduced to a minimal level.

### **3. PRINCIPAL IMPROVEMENT NEEDS**

There were several issues identified during the study that should be addressed by the Municipality relative to the provision of Recreation programs and services. These include the following:

- A strategic plan is not in place to guide efforts of the Department and that identifies and evaluates priorities for additions, deletions or changes in services or programs provided. A comprehensive marketing plan should be developed that utilizes a variety of methods for informing the public of program offerings and identified and promotes sponsorship and other fund-raising opportunities.
- Despite recent gains in covering costs, several functional program areas within the Recreation Department are not self-sufficient and are supported on an annual basis either through revenues from other program areas or from general funds.
- An inventory of community resources / facilities available for use in supporting provision of recreation programs should be developed. Additionally, continued efforts should be undertaken to secure maximum use of available school facilities to provide additional locations for programs and athletic programs.
- A longer-range maintenance plan should be developed to quantify total deferred maintenance needs for major recreation facilities, identify a plan of action for addressing the unmet needs, and identifying the desires of the municipality for provision of facilities (especially where they may compete with private resources – such as ice rink).

The next section provides the project team's recommendations for the Recreation Department.

### **4. SUMMARY OF RECOMMENDATIONS**

As a result of the project team's analysis, the Municipality of Mount Lebanon should make several changes to the Recreation Department mainly focusing on planning efforts to develop a vision for the provision of services and identifying methods for reducing support from the general fund. The Matrix Consulting Group makes the following recommendations:

<b>Issue</b>	<b>Analysis and Recommendations</b>	<b>Cost / (Savings)</b>
<p>Is there a comprehensive strategic plan in place to determine community needs (relative to recreation programming), facility sufficiency, and the marketing program for the department?</p>	<p>The Recreation Department does not have in place a strategic plan that evaluates the current programs and services provided against the identified needs of the Community. On-going customer feedback is not solicited as a means of determining whether programs offered are meeting residents needs. A comprehensive marketing plan should be developed to identify additional methods of promoting participation in programs.</p>	<p>No direct financial cost. Plan can be developed internally.</p>
<p>Does the Department cover all direct costs for the provision of programs and services?</p>	<p>At the present time, the Department is not covering all costs for services. Over the last several years, the amount of the annual “deficit” has been declining in most program areas, but only seasonal programs have routinely covered all costs. The swimming pool is close to covering costs. Additional efforts should be undertaken, including the conduct of a comprehensive user fee study, to set rates at a level sufficient to cover cost of service provision. Prior to adjusting fees, the Commission should adopt a cost-recovery policy that identifies that programs that should be 100% self-sufficient and those programs that will be subsidized (either through other program revenue or general funds).</p>	<p>\$25,000 for performance of user fee study.             (\$300,000 - \$450,000) Potential for increased revenues to offset general fund support if programs become self-sufficient (dependent upon specific cost-recovery goal adopted by the Commission).</p>
<p>Is there a comprehensive inventory of community resources available that identifies space suitable for use in providing community recreation programs?</p>	<p>The Recreation Department has traditionally utilized significant facility resources to supplement those available under the control of the Recreation Department (i.e. – Recreation Center). Additional free or low-cost community locations should be identified to provide alternatives and to supplement the limited space available within the Recreation Center.</p>	<p>None.</p>

<b>Issue</b>	<b>Analysis and Recommendations</b>	<b>Cost / (Savings)</b>
Is there a comprehensive maintenance plan developed that identifies total deferred and on-going maintenance needs for the major Recreation Facilities under the control of the Department?	No comprehensive maintenance plan has been developed at this time. A comprehensive long-range maintenance and rehabilitation plan should be developed for major capital resources of the Department to enable decisions to be made during annual budgeting process regarding capital investment needs.	None.

The detailed analysis of the above issues can be found in the following pages.

<b>RECREATION DEPARTMENT Strategic and Marketing Plans</b>
--

<b>Issue:</b>
---------------

Is there a comprehensive strategic plan in place to determine community needs (relative to recreation programming), facility sufficiency, and the marketing program for the department?
---

<b>Current Situation:</b>
---------------------------

At the present time, there is not a comprehensive strategic plan in place that identifies and targets where the Municipality of Mt. Lebanon wants to position its recreation programs and facilities in comparison to neighboring local communities and the services provided by the private sector. Marketing for programs is handled by individual divisions within the Recreation Department without a fully coordinated approach.
---

**Analysis and Discussion:**

The Mt. Lebanon Recreation Department should develop a comprehensive strategic plan that includes extensive public input to identify and position the Department to meet the needs of the community. The strategic plan should be utilized to target program offerings, determine long-range needs for facilities (buildings, parks, and athletic fields), and clearly indicate the core programs that will be targeted. A specific focus should be developed that discusses opportunities to cooperate with neighboring communities on program provision, and areas that are fully served by current programs offered by the private sector.

The Mt. Lebanon Recreation Department makes effective use of the traditional Recreational Program promotional techniques in advertising course / program offerings. In addition, citizens are able to view and register for classes online. In order to enhance the level of marketing, especially for underutilized programs, the Department should consider alternative advertising methods including:

- Newspaper advertisements – most suitable for high-profile community programs and special events;
- Opt-in Internet Newsletter – this approach would enable those residents who choose participation to receive a periodic newsletter regarding upcoming events, programs, etc.;
- Public Service Announcements – regarding non-traditional programs/special events provided by the Department;
- Course Offering Pamphlets – distributed through athletic clubs, fitness centers, daycare centers, etc. These pamphlets should be focused on specific programs that would be of interest, and not in competition with the offerings, provided by these groups.
- Course Offering Flyers – distributed through the school system.

These approaches can enhance the current efforts currently being undertaken. The development, printing and distribution of a traditional course catalog is a time intensive and more expensive method of informing the public. While effective and often expected by residents, given the lead time required to prepare, print and distribute the catalogs, course offerings cannot be easily added following distribution since the public would not be aware of them.

**Recommendations:**

The Department should develop a comprehensive strategic plan that identifies the Department's planned approach to meeting identified community needs. The strategic plan should include a discussion of the service levels that are being targeted and how the Municipality desires to position itself relative to neighboring communities and private resources in the provision of recreation programs.

**RECREATION DEPARTMENT**  
**Cost of Services and Program Fees.**

**Issue:**

Does the Department cover all direct costs for the provision of programs and services?

**Current Situation:**

The Department, while having a goal of 100% self-sufficiency for direct service costs, has not met this goal in the recent past. However, over the last several years the Department has reduced the amount of expenditures not covered by revenues.

The following table summarizes the cost recovery for the major recreation programs over the last five years for annual operating expenses:

	<u>2003</u>	<u>2004</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>
Seasonal Programs					
Revenue	\$620,458	\$658,262	\$635,996	\$609,962	\$610,961
Expenditures	<u>\$550,557</u>	<u>\$558,555</u>	<u>\$544,474</u>	<u>\$536,431</u>	<u>\$520,834</u>
<b>Net</b>	\$69,901	\$99,707	\$91,522	\$73,531	\$90,127
Golf Course					
Revenue	\$361,303	\$379,224	\$415,300	\$391,541	\$401,400
Expenditures	<u>\$368,269</u>	<u>\$402,916</u>	<u>\$420,351</u>	<u>\$407,473</u>	<u>\$448,341</u>
<b>Net</b>	(\$6,966)	(\$23,692)	(\$5,051)	(\$15,932)	(\$46,941)
Ice Rink					
Revenue	\$804,766	\$820,454	\$720,050	\$821,182	\$890,529
Expenditures	<u>\$999,692</u>	<u>\$1,087,791</u>	<u>\$997,143</u>	<u>\$1,003,011</u>	<u>\$984,615</u>
<b>Net</b>	(\$194,926)	(\$267,337)	(\$277,093)	(\$181,829)	(\$94,086)

**RECREATION DEPARTMENT**  
**Cost of Services and Program Fees.**

Swimming Pool					
Revenue	\$230,075	\$229,947	\$270,225	\$256,625	\$267,954
Expenditures	<u>\$260,096</u>	<u>\$310,530</u>	<u>\$315,003</u>	<u>\$305,012</u>	<u>\$268,208</u>
<b>Net</b>	(\$30,021)	(\$80,583)	(\$44,778)	(\$48,387)	(\$254)
Community Center					
Revenue	\$18,651	\$23,449	\$22,949	\$22,379	\$28,461
Expenditures	<u>\$120,124</u>	<u>\$140,020</u>	<u>\$137,228</u>	<u>\$132,414</u>	<u>\$115,564</u>
<b>Net</b>	(\$101,473)	(\$116,571)	(\$114,279)	(\$110,035)	(\$87,103)
Total Recreation					
Revenue	\$2,102,940	\$2,200,287	\$2,152,469	\$2,185,699	\$2,302,562
Expenditures	<u>\$2,612,988</u>	<u>\$2,870,593</u>	<u>\$2,769,815</u>	<u>\$2,752,381</u>	<u>\$2,698,713</u>
<b>Net</b>	(\$510,048)	(\$670,306)	(\$617,346)	(\$566,682)	(\$396,151)

As noted in the table, the provision of seasonal programs has traditionally been a revenue producer for the Department. Over the last several years, the operation of the swimming pool has been breaking even on an operating basis. Other services and programs, while operating in a deficit position, are trending downward in terms of the subsidy required to provide services. Overall, the Department is achieving approximately a 85% cost recovery for operating expenses. However, there are significant capital investments contemplated over the next several years to maintain, expand and improve facilities.

**RECREATION DEPARTMENT**  
**Cost of Services and Program Fees.**

**Analysis and Discussion:**

The primary purposes of a cost recovery strategy is (1) to know the total cost of providing each service and (2) to recover an amount of money which is acceptable to the community either in a comparative or historical context or with respect to ‘what the market will bear’. The typical definition of total costs in local government is one that includes both the direct and indirect costs for “full cost recovery.” Direct costs most often include both divisional and departmental charges incurred in providing the service. Indirect costs include all costs incurred as municipal-wide overhead in providing the services.

The pricing of community services at targeted cost recovery levels has a number of characteristics and benefits, including:

<b>Characteristics of Formal Cost Recovery Strategy</b>	<b>Advantages of Formal Cost Recovery Strategy</b>
<ul style="list-style-type: none"> <li>• All direct, indirect and allocated overhead costs are identified as a cost of providing a service to the public.</li> <li>• A cost recovery philosophy is developed which commits the city to specific cost recovery levels based on the market for each service, community goals of service, accessibility, etc.</li> <li>• Subsequent decisions regarding fee waivers or subsidies can be made to ensure that fees for specific populations do not adversely impact accessibility for these services.</li> <li>• Adjustments are made in subsequent years based on inflation in costs, changes in the market and changes in cost recovery goals.</li> <li>• City Council policy establishes a formal level of cost recovery for services.</li> </ul>	<ul style="list-style-type: none"> <li>• The City knows the real cost of providing a service, even though decisions can be made regarding recovering only a portion of these costs.</li> <li>• Fees based on costs can be charged to all users, including resident and non-resident who do not pay general property taxes.</li> <li>• Appropriately priced user fee charges where a service is not being provided to the general public, and is for the specific benefit of the person or groups charged.</li> <li>• User charges as a means of rationing the provision of certain services and of gauging the demand for service.</li> <li>• Development of a formal subsidization policy or formal scholarships (fee waiver) based on patron need.</li> </ul>

Mt. Lebanon should undertake a comprehensive fee study for the recreation department, at an estimated cost of \$25,000, to determine appropriate fees by individual program to provide full-cost recovery of annual operating costs.

**RECREATION DEPARTMENT**  
**Cost of Services and Program Fees.**

In accordance with the GFOA recommended practice for setting of government charges and fees, the association recommends that the formal policy should clearly identify the circumstances under which the full cost of providing will not be targeted (i.e. – to regulate demand, subsidize certain activities, administrative issues regarding collection of fees, or the promotion of other goals). Additionally, fees should be reviewed annually to determine whether a change is necessary to meet the policy goals. The policy adopted by Mt. Lebanon should clearly identify for each major program in the Recreation Department the targets to be achieved through cost-recovery.

**Recommendations:**

Mt. Lebanon should review the current cost recovery policy covering the Recreation Department and provide guidance, by major program area, regarding desired cost recovery guidelines. Additionally, a fee study should be conducted, at an estimated cost of \$25,000, to determine the fees necessary to meet the established cost-recovery guidelines. Fees should be reviewed annually, thereafter, to ensure they are adjusted as appropriate to cover the costs of providing services.

**RECREATION DEPARTMENT**  
**Inventory of Community Resources and Facilities.**

**Issue:**

Is there a comprehensive inventory of community resources available that identifies space suitable for use in providing community recreation programs?

**Current Situation:**

The current community center has limited space for offering recreation programs and activities. To supplement this space, the Department makes extensive use of school facilities (both buildings and athletic fields). However, some concerns have been identified recently with availability of these additional resources based upon their need to support school functions and activities.

**Analysis and Discussion:**

The Department should undertake a community survey and inventory to identify additional space within Mt. Lebanon that would be suitable and available for use as locations for Recreation programming and activities. The focus should be on identifying additional classroom-type space that can be used to support a variety of programs and that are available at minimal or no cost to the Department. Absent the identification of additional space for use in providing recreation programming, the number and types of programs offered by the Department may be limited due to space constraints.

**Recommendations:**

The Department should complete an inventory of community resources / space that is available for use to support municipal recreation programs to supplement space currently available within the Recreation Center and through School District facilities.

**RECREATION DEPARTMENT  
Maintenance Plan.**

**Issue:**

Is there a comprehensive maintenance plan developed that identifies total deferred and on-going maintenance needs for the major Recreation Facilities under the control of the Department?

**Current Situation:**

There are several identified large capital projects identified as necessary to maintain recreation facilities within the Municipality of Mt. Lebanon. However, a comprehensive deferred and on-going maintenance program has not been developed to identify all current and projected maintenance, rehabilitation and expansion needs.

**Analysis and Discussion:**

The current major facilities available for use by the Recreation Department in providing services are aging and will require significant investment to maintain their suitability for use into the future (and to provide adequate space for programming). In 2009 alone, the preliminary budget identified the need for the following capital expenditures to support the Recreation Department's facilities and grounds:

- \$4,000,000 – Swim Center Improvements
- \$1,200,000 – Athletic Field Improvements
- \$ 400,000 – Golf Course Improvements
- \$ 150,000 – Tennis Center Improvements

To more effectively manage capital investments and on-going maintenance, a maintenance plan should be developed that covers a ten to fifteen year time period and identifies major anticipated capital outlays to maintain existing facilities, perform routine rehabilitation and replacement of major mechanical systems, and estimates major on-going maintenance expenses. This plan will provide a longer-term approach for policy-makers in understanding the required on-going investment to maintain the dedicated facilities and grounds maintained and operated by the Recreation Department.

**RECREATION DEPARTMENT**  
**Maintenance Plan.**

**Recommendations:**

The Recreation Department, in conjunction with the Finance Department, should develop a long-range (at least 10 years) capital refreshment and maintenance plan for the facility and grounds operated by the Department. This plan should be utilized in making annual budgetary decisions regarding capital investments necessary to maintain existing facilities at level sufficient to provide desired services for the community.

## 13. TAX OFFICE

### 1. DEPARTMENT SUMMARY

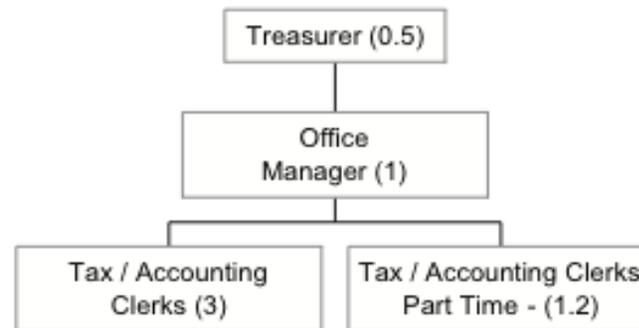
The Tax Office is responsible for the collection of the municipal earned income, real estate and municipal service taxes. Taxes are collected for the Municipality, as well as the School District. The Office is also responsible for the receipt and processing of all municipal deposits. Staff in this office receive and deposit funds from all operating departments, as well as perform collections activities on delinquent accounts.

Function	Staffing by Classification	
Tax Office	Treasurer	0.50
	Office Manager	1.00
	Tax / Accounting Clerks	3.00
	Tax / Accounting Clerks (Part-Time)	1.20

Presented below is the plan of organization for the Tax Office.

**Current Organization of the Tax Office**

**Mt. Lebanon, Pennsylvania**



**2. DEPARTMENTAL STRENGTHS**

The project team compared the organization, operations, and management of the Tax Office to ‘best practices.’ This section highlights a number of key strengths with respect to the Tax Office. This includes a discussion of the steps taken in the Office to reduce costs and increase the efficiency and effectiveness of operations. The points, which follow, present this discussion.

- The Tax Office works closely with the Finance Department. This includes cashing handling policies, procedures and training, as well as financial reporting, etc.
- The Tax Office utilizes part-time staff to address peaks in workload. Additionally, part-time staff are crossed trained and flexibility scheduled.
- The Office Manager is responsible for reviewing monthly bank statements, generating monthly reports and comparing transactions to reports.

- The Tax Office has developed proactive programs to assist in revenue collection (i.e., distribution of letters to landlords for renters to facilitate the collection of the local earned income tax, etc.)
- The Tax Office has developed collection programs to increase collection rates. This includes delinquency notices, property liens and garnishments.

Overall, there a number of strengths within the Tax Office, which has taken a number of steps to reduce cost while maintaining service levels.

### **3. PRINCIPAL IMPROVEMENT NEEDS**

The project team compared the Tax Office to ‘best management practices.’ As noted, the project team identified a number of key strengths. With that said, the spans of control in the Tax Office are narrow with a part-time Treasurer and full-time Office Manager. The Treasurer position is set by the Municipality’s Home Rule Charter.

### **4. SUMMARY OF RECOMMENDATIONS**

As a result of the project team’s analysis, the Municipality of Mount Lebanon should make several changes to the Tax Office. The Matrix Consulting Group makes the following recommendations:

<b>Issue</b>	<b>Analysis and Recommendations</b>	<b>Cost / (Savings)</b>
Is the plan of organization efficient?	There are narrow spans of control in the Tax Office and in other similar service departments, such as Finance. While the Treasurer position is set by Home Rule Charter, the Municipality should explore options to amending the charter to eliminate the Treasurer position and consolidate the Tax Office as a division of the Finance Department.	Treasurer Compensation

The detailed analysis of the above issues can be found in the following pages.

**TAX OFFICE:**

**The Municipality should explore options to amend the Charter to eliminate the Treasurer position and consolidate the Tax Office as a Division of the Finance Department.**

**Issue:**

Is the plan of organization in the Tax Office efficient?

**Current Situation:**

The Treasurer is a part-time elected position that is responsible for providing oversight and management of the Office. Requirements for this position are established by the Municipality's Home Rule Charter. This position reviews monthly deposits, collections and activities and works closely with the Office Manager to review operations. The Office Manager is responsible for the day-to-day management of the Tax Office.

**Analysis and Discussion:**

Spans of control are narrow in the Tax Office with the 0.5 Treasurer and 1.0 Office Manager. The Tax Office has a total staffing of 5.70 FTES, including the 1.5 supervisory and management positions. The Tax Office works closely with the Finance Department to ensure proper adherence to local and state regulations regarding tax collections, internal controls and financial management. The Treasurer position is set by the Municipality's Home Rule Charter and are:

- The Municipality shall have a Treasurer, elected at large and responsible for the collection of all property taxes, earned income taxes, occupational privilege taxes and other general taxes which the Commission may levy. The Treasurer shall be also responsible, as provided in Section 909, for signing all checks for the disbursement of municipal funds. He shall be entitled to complete and accurate information from the Manager or Acting Manager in regard to any check he is asked to sign.
- The Treasurer shall receive all municipal moneys from all sources, and promptly deposit the same in a bank, banking institution or trust company in the name of the Municipality, and keep distinct accounts of all sums received from taxes and other sources, which accounts shall at all times be open to the inspection of the members of the Commission and the municipal Auditor. He shall annually state his accounts, and lay the same, together with all related books and vouchers, before the municipal Auditor for audit.

**TAX OFFICE:**

**The Municipality should explore options to amend the Charter to eliminate the Treasurer position and consolidate the Tax Office as a Division of the Finance Department.**

**Recommendations:**

The Municipality should explore options to eliminate the part-time Treasurer position. The Finance Department Director and / or the Tax Office Manager should absorb the duties of the Treasurer position. The Tax Office should be organized as a Division of the Finance Department.