



Town of Victor Strategic Plan

Fiscal Responsibility Task Force



**Strategic Intentions and Key Initiatives –
Final Report**

September 26, 2011



Victor Strategic Plan
Fiscal Responsibility Task Force
Strategic Intent and Key Initiatives Summary

Strategic Intent # 4

By 2011, the Town of Victor will benefit from a budgeting process which maximizes available financial resources, minimizes debt service and maximize return on investments.

A detailed, workable fiscal plan will be in place that defines the steps needed to maximize revenue opportunities, manage the financial impacts of development in the areas surrounding Victor, and also minimize the cost of delivering the highest level of appropriate services while staying true to the Mission and Vision for the future of the Victor community.

Achieving these goals will be the responsibility of the Finance Office.

Key Initiatives



1. Complete a benchmark of 12 'like communities' and create a detailed plan identifying areas of greatest opportunity for improvement in our Fiscal Responsibility, including a budget plan for that improvement.

Completed

2. Incorporate best practices discovered during the benchmarking activity in Town services, by department.

Data collected; presentations made to Town Board.

3. A proactive plan will be in place to manage the impact of development in both the Town of Victor and the surrounding Towns, on our community fiscal health. Development impacts will be identified and documented and with next steps outlined to improve our handling and responsiveness to these development impacts.

This is being addressed in the Comprehensive Plan.

This Task Force's main project was to conduct the benchmarking study and analyze and deliver the results to the Town Board. The Finance Dept. had several changes over the past three years - the other Key Initiatives and Strategic Intentions outside of the benchmarking activity need to be re-evaluated for applicability and need by the Town Board and the Finance Department.



Victor Strategic Plan

Task Force:	Date:	Champion(s):
Fiscal Responsibility	2011	Keri Curtis/Gloria Dunton

Strategic Intent # 4

Key Initiative # 1
<p>1. Complete a benchmark of 12 ‘like communities’ and create a detailed plan identifying areas of greatest opportunity for improvement in our Fiscal Responsibility, including a budget plan for that improvement.</p>

Year	#	Action Plan	Status
2009	1.1	The Fiscal Responsibility Task Force to generate a rough draft of this benchmarking and form a study group of various government officials, Department Heads, and private citizens as necessary.	<i>Completed</i>
2009	1.2	Coordinate the benchmarking activity with the other Task Forces. As part of this effort with the other Task Forces, define a budget and search for an organization that can help us with the benchmarking activity. <i>The Center for Government Research conducted the study.</i>	<i>Completed</i>
2009	1.3	Present to the Town Board.	<i>Completed</i>
2009	1.4	Define and collect comparative information: examples may include but are not limited to, Town structure, salaries/benefits of elected and appointed officials, term of officials, services, acres of land owned, total acres in Town, acres of green space, salaries/benefits of appointed board members, debt, cash on hand, revenues from sale tax, revenues from property tax, school tax per thousand, total tax.	<i>Completed</i>
2011	1.5	Evaluate information and develop implementation plan for areas of opportunity.	<i>Completed</i>
2011	1.6	Identify budget plan for any improvements identified	<i>Presented</i>



		during the benchmarking.	<i>in reports to Town Board</i>
2011	1.7	Present final findings to Town Board.	Completed



Victor Strategic Plan

Task Force:	Date:	Facilitator(s):
Fiscal Responsibility	2011	Keri Curtis/Gloria Dunton

Strategic Intent # 4

Key Initiative # 2
2. Incorporate best practices discovered during the benchmarking activity in Town services, by department.

Year	#	Action Plan	Status
2010	2.1	Form a study group of appropriate government officials, Department Heads and private citizens. <i>This was the Task Force itself, which was composed of all of the above members.</i>	Completed
2011	2.2	Evaluate current practices and compare to best practices and refine as appropriate. <i>Best practices identified within “survey” towns and communicated through Town Board reports.</i>	Completed
2010	2.3	Identify existing services to continue to be offered by our Town and the past cost of these services. <i>Done in Town Board presentations and discussions.</i>	Completed
2010	2.4	Identify potential new services to be offered by our Town. <i>Done in Town Board presentations and discussions.</i>	In-process
2010	2.5	Work with Town Officials and Department Heads to define budget needs. <i>Quarterly budget review sessions implemented with Department Heads/Town Supervisor/Fiscal Manager</i>	On-going
2011	2.6	Create best practice plans, by Department and implement. <i>This Task Force has learned from other Towns in the Benchmarking Study, and has passed recommendations on to the Town Board concerning best practices for their consideration.</i>	On-going



Victor Strategic Plan

Task Force:	Date:	Champion(s):
Fiscal Responsibility	2011	Keri Curtis/Gloria Dunton

Strategic Intent # 4

Key Initiative # 3
<p>3. A proactive plan will be in place to manage the impact of development in both the Town of Victor and the surrounding Towns, on our community fiscal health. Development impacts will be identified and documented and steps will be outlined to improve our handling and responsiveness to these development impacts.</p>

Year	#	Action Plan	Status
2011	3.1	Develop a list of items that could cause instability in predicting revenues and expenditures for the Town's finances.	<i>Finance Dept. deemed as non applicable</i>
2011	3.2	Develop a list of items that could impact demand for services and cost of services.	<i>Finance Dept. deemed as non applicable</i>
2010	3.3	Define the process for prioritizing Town expenditures. <i>Budget process in place; Town Board reviews budget requests through a series of budget workshops.</i>	On-going
2010	3.4	Hire consultant such as Center for Governmental Research to put together a report that will define how development will impact sales, school, and county taxes. Cost of this is estimated to be no more than \$10,000.	<i>Finance Dept. deemed as non applicable</i>
2010	3.5	Define the parameters for how property values may be impacted by development and instability in our Town's finances.	<i>Finance Dept. deemed as non applicable</i>
2010	3.6	Determine how development in the Town will affect future plans for the Village of Victor.	<i>Finance Dept. deemed as non applicable</i>
2010	3.7	Determine how development in Towns bordering Victor will affect our Town's finances.	<i>Finance Dept. deemed as non applicable</i>



			<i>applicable</i>
2010	3.8	Create a plan and communicate to various Town boards and incorporate into Towns Comprehensive Plan.	<i>Finance Dept. deemed as non applicable</i>



Victor Strategic Plan

Strategic Intent # 5

By 2012, we will have increased our community shared resource capability and reduced our community duplicate costs to as low a threshold as possible.

This will be accomplished by working with both the Town and Village governments to analyze current financial documents and identify areas of possible improvements and various options available to us as a community to improve the services and reduce costs to the Town and Village. It is recognized that this is a sensitive issue; we believe that we need full cooperation of the Village government.

The Village is looking for a grant to identify the pros and cons of service/government consolidation.

Key Initiatives



Victor Strategic Plan

Task Force:	Date:	Champion(s):
Fiscal Responsibility	2011	Keri Curtis/Gloria Dunton

Strategic Intent # 5

Key Initiative # 1

1. Identify areas of community shared resources and duplicate costs from current Town / Village balance sheet and income statements.

The Village is looking for a grant to examine the Action Plan items listed below. The items below have not been completed and will require a willing partnership between the Town and Village to pursue cost-sharing efforts. Currently the Village DPW and Town Highway Dept. share in service and equipment.

Year	#	Action Plan	Status
2010	1.1	Form a study group of appropriate government officials, department heads and private citizens.	<i>Not completed</i>
2010	1.2	Use a checklist to see what the potential is for cost saving changes in our government – general areas for checklist should include general government, public safety, highways, health, recreation, sanitation, and water; other as appropriate. (Cost savings checklist available from publication entitled ‘Consolidation for Towns and Villages,’ James A. Coon Local Government Technical Series, 12/98.)	<i>Not completed</i>
2010	1.3	Analyze all financial documents – income statements, balance sheets and project budget plans.	<i>Not completed</i>
2010	1.4	Develop inventory of services now being provided by the individual governments (begin with information obtained above from Key Initiative # 1-3 answer two important questions – What services are the existing governments providing? And - What do these services costs?).	<i>Not completed</i>
2010	1.5	Plan the services that the Town / Village government(s) will provide and estimate the expenditures and revenues by using information from Key Initiatives #1-3.	<i>Not completed</i>



Victor Strategic Plan

Task Force:	Date:	Facilitator(s):
Fiscal Responsibility	2011	Keri Curtis/Gloria Dunton

Strategic Intent # 5

Key Initiative # 2

2. Analyze the various options to save money and improve services to both the Town and Village. .
The items below have not been completed and will require a willing partnership between the Town and Village to pursue cost-sharing efforts.

Year	#	Action Plan	Status
2010	2.1	Form a study group of appropriate government officials, department heads and private citizens.	<i>Not completed</i>
2010	2.2	Use a checklist to see what the potential is for cost saving changes in our government – general areas for checklist should include general government, public safety, highways, health, recreation, sanitation, and water; other as appropriate. (Cost savings checklist available from publication entitled ‘Consolidation for Towns and Villages,’ James A. Coon Local Government Technical Series, 12/98.)	<i>Not completed</i>
2010	2.3	Analyze all financial documents – income statements, balance sheets and project budget plans.	<i>Not completed</i>
2010	2.4	Develop inventory of services now being provided by the individual governments (begin with information obtained above from Key Initiative # 1-3 answer two important questions – What services are the existing governments providing? And - What do these services costs?).	<i>Not completed</i>
2010	2.5	Plan the services that the Town / Village government(s) will provide and estimate the expenditures and revenues by using information from Key Initiatives #1-3.	<i>Not completed</i>



Victor Strategic Plan

Strategic Intent # 6

By 2012, 75% of the community respondents will indicate that they have a clear, trusted, concise understanding of the Town's fiscal policy. (Note: Our citizens have a right to see exactly where their tax dollars are ending up.)

Key Initiatives

1. Define the needs and wants of our citizens regarding visibility of the Town's fiscal Information.
2. Develop and deliver a communication vehicle for providing Town fiscal information to the community.

Audits and budgets are posted on the Town website. Budget workshops and public hearings



Victor Strategic Plan

Task Force:	Date:	Champion(s):
Fiscal Responsibility	2011	Keri Curtis/Gloria Dunton

Strategic Intent # 6

Key Initiative # 1
1. Define the needs and wants of our citizens regarding visibility of the Town’s fiscal Information.

Year	#	Action Plan	Status
2010	1.1	Define the role of the community in the Town budget process and define the level of interest in this information in the community. <i>Budget workshops are advertised and open to the public.</i>	Completed
2010	1.2	Develop a tool to understand what the community wants to know about the Towns Fiscal Policy. <i>Possible offer a shorter version of the budget – a quick synopsis for the public.</i>	<i>Not completed</i>



Victor Strategic Plan

Task Force:	Date:	Champion(s):
Fiscal Responsibility	2011	Keri Curtis/Gloria Dunton

Strategic Intent # 6

Key Initiative # 2
2. Develop and deliver a communication vehicle for providing Town fiscal information to the community.

Year	#	Action Plan	Status
2010	2.1	Working with the Communications Task Force, identify the options for a communication vehicle to get the word out to the community about the Town’s Fiscal information. <i>Town budget and audits are posted on line; news media delivers information; comment cards and “contact us” vehicles available on website and Facebook.</i>	<i>Completed</i>
2010	2.2	For each communication vehicle option, define the process to determine the community understanding of our Fiscal policy, including size and frequency of the communication. <i>Residents do show up at budget workshops and public hearings. Communications need to be simplified.</i>	<i>Not completed</i>
2010	2.3	Create the communications vehicle and deliver it to the community.	<i>Completed and delivered</i>