

Task Force Final Report: Part A

Charge / SWOT and Critical Issues

Task Force # 4	Facilitators:	Date:
Fiscal Responsibility	Mike Weidner	October 10, 2006 Certified Copy

<p>Members: Betty Dean, Mike Donnelly, John Holden</p> <p>Charge: To analyze and investigate all Town services and amenities as related to their cost/benefit and the impact on tax rates.</p> <p>Benchmark with other “like communities” and conduct a comparable analysis. Included in the discussion will be school and property taxes, assessments, sales tax rate, employee compensation and benefits as related to quality and delivery of services. Prepare recommendations for the most cost effective solutions for supporting the highest caliber of services and quality of life we can achieve.</p>

<i>SWOT Analysis Summary:</i>	
Internal (S/W)	External (O/T)
<p><u>Strengths:</u></p> <ul style="list-style-type: none"> - Healthy balance sheet - Good tax base - Town government ready to change - Town and Village shared resources - Stable per capita cost <p><u>Weakness:</u></p> <ul style="list-style-type: none"> - Communication of fiscal information - Prioritization of expenditure - Assessments and tax rate stability - Town and Village relationship - Unknown demographic impact 	<p><u>Opportunities:</u></p> <ul style="list-style-type: none"> - Benchmark ourselves against like communities to improve services - Planned development - Aggressive Investments - <p><u>Threats:</u></p> <ul style="list-style-type: none"> - Unplanned development - Unstable economy - Changes in the real estate markets - State aid to municipalities and schools

<i>Our Critical Issues:</i>
1. Do we have duplication of services that can be combined?
2. What services do citizens really want?
3. How stable is sales tax revenue?
4. What about cost of services to developments?
5. What is the difference in cost of services for school age vs. non school age residents?
6. How do we return to the state that “Money Magazine” gave Victor as one of the top two communities to reside in NYS?

7. Are there redundant services between the Village and Town?
8. Can any service be combined/streamlined/eliminated?
9. How should we prioritize expenditures?
10. What is controlled by government mandates - state and federal?
11. How does increased development impact demand for services and cost for services?
12. How to define region?
13. What were the “Money Magazine” criteria for a “Top Rated Community”?
14. How can the community obtain and trust clear, concise fiscal information?

<i>Summary of Recommendations/Findings</i>
Final statement of support, any additional information to be considered.
We had very little resource participation on this Task Force and are concerned about not reflecting the Village’s input to this document.

Task Force Final Report: Part B

Strategic Intent/Key Initiatives/Action Plans and Cost Benefit\

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Strategic Intent # 1: By 2011, the Town of Victor will benefit from a budgeting process which maximizes available financial resources, minimizes debt service at not greater than __% and achieves __% return on investments, annually.

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.

Key Initiative # 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	C/B	#	Action Plan (Indicate Priority (P) with a check. Check Cost / Benefit (C/B) if required)	Who
*		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.	
*	TBD	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. Benchmarking activity budget must be determined before the end of October 2006.	
*		3	Present to the Town Board by October 2006.	
	TBD	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.	
*		5	Evaluate information and develop implementation plan for areas of opportunity.	
*		6	Identify budget plan for any improvements identified during the benchmarking.	
		7	Present final findings to Town Board by October 2007.	

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

P	C/B	#	Action Plan (Indicate Priority (P) with a check. Check Cost / Benefit (C/B) if required)	Who
		1	Form a study group of appropriate government officials, department heads and private citizens.	
*		2	Evaluate current practices and compare to best practices and refine as appropriate.	
*		3	Identify existing services to continue to be offered by our Town and the past cost of these services.	
*		4	Identify potential new services to be offered by our Town.	
		5	Work with Town officials and department heads to define budget needs.	
*	TBD	6	Create best practice plans, by department and implement.	

Key Initiative #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	C/B	#	Action Plan (Indicate Priority (P) with a check. Check Cost / Benefit (C/B) if required)	Who
*		1	Develop a list of items that could cause instability in predicting revenues and expenditures for the Town's finances.	
*		2	Develop a list of items that could impact demand for services and cost of services.	
		3	Define the process for prioritizing Town expenditures.	
*		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.	
*		5	Define the parameters for how property values may be impacted by development and instability in our Town's finances.	
		6	Determine how development in the Town will affect future plans for the Village of Victor.	
		7	Determine how development in Towns bordering Victor will affect our Town's finances.	
*	TBD	8	Create a plan and communicate to various Town boards and incorporate into Towns Comprehensive Plan.	

Strategic Intent #2: By 2011, we will have increased our community shared resource capability and reduced our community duplicate costs by 50%. 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.

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

P	C/B	#	Action Plan (Indicate Priority (P) with a check. Check Cost / Benefit (C/B) if required)	Who
*		1	Form a study group of appropriate government officials, department heads and private citizens.	
*		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.)	
		3	Analyze all financial documents – income statements, balance sheets and project budget plans.	
		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?).	
*		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.	

Key Initiative #2: Analyze the various options to save money and improve services to both the Town and Village.

P	C/B	#	Action Plan (Indicate Priority (P) with a check. Check Cost / Benefit (C/B) if required)	Who
		1	Form a study group of appropriate government officials, department heads and private citizens.	
*		2	Analyze the various options to save money and improve services to both the Town and Village. (Reference publication entitled “Consolidation for Towns and Villages”, James A. Coon Local Government Technical Series, 12/98).	
*		3	Create list of upside and downside potential for all options (affects on both revenue and expenditures).	
*		4	Analyze the impact of changing Town/Village structure on Federal and State Aid currently provided to the community of Victor.	
		5	Present findings to the Village and Town Boards and make determination of how to present to Village and Town voters with cooperation from both the Village and Town.	

Strategic Intent #3: By 2011, 75% of the community respondents will indicate that they have a clear, trusted, concise understanding of the Town’s fiscal policy and know where to easily find the information - where dollars come from, how dollars are invested, and how dollars are spent.
Our citizens have a right to see exactly where their tax dollars are ending up.

Key Initiative #1: Define the needs and wants of our citizens regarding visibility to the Towns Fiscal Information.

P	C/B	#	Action Plan (Indicate Priority (P) with a check. Check Cost / Benefit (C/B) if required)	Who
*		1	Define the role of the community in the Town budget process and define the level of interest in this information in the community.	
*	TBD	2	Develop a tool to understand what the community wants to know about the Towns fiscal policy.	
*		3	Identify areas of the fiscal policy with the highest impact to the different community groups – home assessments and impact on the homeowner, etc.	

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

P	C/B	#	Action Plan (Indicate Priority (P) with a check. Check Cost / Benefit (C/B) if required)	Who
		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	
		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	
*	TBD	3	Create the communications vehicle and deliver it to the community	

Cost/Benefit Analysis

Strategic Intent # 1: By 2011, the Town of Victor will benefit from a budgeting process which maximizes available financial resources, minimizes debt service at not greater than __% and achieves __% return on investments, annually.

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.

Key Initiative # 1	Action Plan(s) # 1 - 7
Cost	Benefit
Itemize estimated financial, time, human resource and other associated costs.	Itemize the potential impact/benefits; detail rationale and compelling reason for the Initiative or Action Plan.
\$25,000.00 - \$30,000 as per to Kent Gardner of CGR.	To take advantage of professional expertise.

Cost/Benefit Analysis

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Key Initiative # 3	Action Plan(s) # 4
Cost	Benefit
Itemize estimated financial, time, human resource and other associated costs.	Itemize the potential impact/benefits; detail rationale and compelling reason for the Initiative or Action Plan.
Hire a 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, as per Kent Gardner of CGR.	To take advantage of professional expertise.