

CGR

Evaluation of Potential Government Structures

Analysis of Operational and Fiscal Impacts

Joseph Stefko, Ph.D. | Project Director



About CGR

- ▶ Founded in 1915, we've been at the forefront of local government efficiency for *ninety-six years*
- ▶ Independent 501(c)(3) non-profit organization staffed by 20 professionals with expertise in the fields of government management, economic/fiscal analysis, service delivery and community analysis
- ▶ Unmatched experience on issues of dissolution, shared services and consolidation
 - ▶ Forty (40) communities in the past four years alone
 - ▶ Work spanning NJ, NY, OH, MA and ME

Primary Staff Team

▶ **Joseph Stefko, Ph.D.**

Director of Public Finance

13 yrs experience working on/in local government management, directing dozens of projects on shared services and consolidation; has managed consolidation/ dissolution/reorganization studies in seventeen (17) communities since 2008 in New York, Massachusetts and New Jersey; directing CGR's soon-to-begin engagement in Rye, NY

▶ **Ana Liss, M.P.A.**

Research Associate

Analyst with CGR's local government services management team; formerly staff member with the Economy League of Greater Philadelphia and the University of Pennsylvania's Fels Institute of Government, where her research focused on governance models, inter-municipal collaboration and enhancing regional economic competitiveness

▶ **Jaime Saunders, M.P.A.**

Senior Associate

Key member of CGR's local government services management team, currently managing CGR's dissolution feasibility studies in Candor and Potsdam, and consolidation engagements in Hudson Falls and Kingsbury, NY

CGR's Philosophy

- ▶ **Objective, fact-based collection and review of data**
 - ▶ We've no preconceived notion! An independent collection of data and facts is essential to building a shared information foundation for *any* examination of dissolution, shared services or consolidation.

- ▶ **Facilitate an active public engagement strategy and two-way flow of information**
 - ▶ Any consolidation or shared service effort *must* encourage an active, transparent and open flow of information with the larger community.

Phase 1: Project Kickoff and the Initiation of Community Engagement

- ▶ Meet with the Steering Committee to overview project objectives, clarify roles and expectations, and ensure strategy for achieving goals in the most timely manner
- ▶ Identify critical data components, stakeholders and primary interviewees for *Baseline Review*
- ▶ Launch comprehensive project website to provide community access to the study, data, the study team and Steering Committee
 - ▶ Sample: www.cgr.org/princeton

Public Forum #1

- ▶ Review study objectives
- ▶ Inform the community of how to access information and solicit feedback
- ▶ Public comment



Phase 2: Baseline Review of Current Operations and Finances

- ▶ Independent collection of key data components, both quantitative *and* qualitative
 - ▶ Budgets, municipal services and key operational considerations
 - ▶ Debt statements
 - ▶ Assets
 - ▶ Properties
 - ▶ Collective bargaining agreements
 - ▶ Staff rosters and organizational charts
 - ▶ In-depth interviews with key stakeholders, elected officials and department heads to fully understand how the municipalities function

Public Forum #2

- ▶ Update study process
- ▶ Present *Baseline Review* of current governance, services
- ▶ Inform community of “what exists” in Town and Village
- ▶ Public comment



Phase 3: Analysis of Feasibility and Impact of Coterminous Town/Village Option

- ▶ Analysis of Operational and Financial Impacts
 - ▶ How would services be addressed?
 - ▶ How would staff allocations be addressed?
 - ▶ Which entity/entities would assume service responsibilities?
 - ▶ How would shifts impact operations and/or budgets?
 - ▶ What cost efficiencies may be available?

- ▶ Analysis of Governance Options
 - ▶ Process requirements for coterminous Town/Village
 - ▶ Transitional and fiscal impacts of different options
 - ▶ Develop model for reallocating existing revenues
 - ▶ Identify other potential shared services that could remain

Phase 3 (continued)

- ▶ How would option(s) impact existing IMAs?
- ▶ How would option(s) impact taxpayers?
- ▶ How would option(s) impact Village of Briarcliff?

- ▶ Phase 3 results in the *Coterminous Options Feasibility Report*

Phase 4: Developing the Coterminous Plan

- ▶ Based on the menu of options presented in the *Coterminous Options Feasibility Report*, CGR will work with the Steering Committee to craft a coterminous plan
- ▶ Process will occur through multiple meetings with the Steering Committee
- ▶ CGR will compile the Committee's recommendations into a *Coterminous Implementation Plan*

Phase 5: Review of Other Structural Options

- ▶ The objective of this study is to reduce costs and lower the tax burden through governance changes and efficiencies
- ▶ The RFP envisions a predetermined option – creation of coterminous town/village, but there *may* be alternative ways of accomplishing the same goal (*e.g.* shared services, functional consolidation, etc.)
- ▶ To the extent they are identified during the study, CGR will evaluate those other options at a high level and offer recommendations to the Steering Committee

Public Forum #3

- ▶ Update study process
- ▶ Present *Coterminous Options Feasibility Report/Plan* and review of other structural options
- ▶ Review potential operational and financial impacts
- ▶ Public comment



Timeframe

- ▶ Our proposal was developed to be responsive to the Steering Committee's request for an 8-month study
- ▶ We're ready, willing and able to meet that timeframe, and will work closely with the Town and Village to obtain necessary data in timely fashion
- ▶ **Our cautionary note:** *Ensure the Steering Committee and community have sufficient time to understand, synthesize and discuss the potential impacts of changes to services and governance structures*

Conclusion

- ▶ We're prepared to put 96 years of experience to work for the Ossining community on an issue of critical importance to residents, businesses and other stakeholders...
- ▶ ...to position the Steering Committee and the community to make an *informed decision based on comprehensive facts* as to the best way to govern and provide services to the community going forward