

STRATEGIC ASSESSMENT REVIEW

&

FIVE YEAR “GAME PLAN”

FOR

EAST BRANDYWINE TOWNSHIP



By:

The Strategy Group, Inc. & Halvorsen Associates, LLC

EAST BRANDYWINE TOWNSHIP

**THE FASTEST GROWING MUNICIPALITY IN SOUTHEAST
PENNSYLVANIA**

...As Chester County grew in population by **3.9%** between 2010 and 2017, East Brandywine Township experienced a **25.3%** increase during the same timeframe

...Growth, the Township will continue to experience with three *additional* new developments *already* planned, according to Township Manager, Scott Piersol (Philadelphia Inquirer, June 2018)

...Resulting in a population growth from 6,771 in 2010 to approximately 11,000 within just a few years...

A common theme expressed by several of the Township Managers interviewed for this project, included the following:

1. The *faster and bigger* the Township grows, the greater will be the challenges. Put into one phrase: *“you need to understand that how you managed things in the past doesn’t necessarily mean it will work in the future.”*
2. There’s reconciling the different demands and expectations of the new residents with those who have lived in East Brandywine for decades, which will require a high degree of diplomacy and evenhandedness.
3. Recognizing the increased demands on Township services will require a more sophisticated level of operational, human resource, financial planning & management and oversight.
4. Undertaking a full-on review to determine if the Township’s priorities, when it was much smaller, still make sense, today and over the next five years.

“And with all of that, to be successful will necessitate the biggest challenge of all: communication!!!!...communication!!!!...communication!!!!... with all the stakeholders!”

PROJECT INTERVIEW LIST

In addition to our reviewing voluminous Township-related and external documents & reports, and moderating a Public Town Hall meeting involving several dozen Township residents that took place June 18th, we are grateful to the following individuals who agreed to participate in confidential in-depth interviews and/or a strategic focus group.

Name	Title	Date
Scott Piersol	East Brandywine Township Manager	2/7/2018
Luke Reven	Assistant East Brandywine Township Manager	2/7/2018
Jay Fisher	East Brandywine Township Supervisor	2/8/2018
Kyle Scribner	East Brandywine Township Supervisor	2/14/2018
Jason Winters	East Brandywine Township Supervisor	2/14/2018
Matt VanLew	East Brandywine Roadmaster	2/14/2018
Lisa Taraschi	East Brandywine Administration Assistant	2/14/2018
Norann King	East Brandywine Administration Codes	2/14/2018
Chief Mark Kocsi	East Brandywine Police Chief	2/15/2018
Mary Slade	East Brandywine Treasurer/ Secretary	2/15/2018
Chris Ott	East Brandywine Public Work Crew	2/15/2018
Derek Claas	East Brandywine Public Work Crew	2/15/2018
Bruce Rawlings	East Brandywine Planning Commission	2/20/2018
Jim Buczala	East Brandywine Historical Commission	2/22/2018
Casey LaLonde	West Goshen Township Manager	2/22/2018
Kristen Camp	East Brandywine Township Solicitor	2/26/2018
Tom Oeste	East Brandywine Authority Solicitor	2/26/2018
Mike Corbin	East Brandywine Planning Commission	2/27/2018
John Black	Phone Interview East Brandywine	2/27/2018
Doug Hanley	Uwchlan Township Manager	2/27/2018
David Summers	East Brandywine Municipal Authority	3/13/2018
Jim Gorman	Vanguard Advisor	3/13/2018
Alan Yefko	East Brandywine Open Space Commission	3/15/2018
Sandy Lammey	East Brandywine Park/Recreation Chairman	3/15/2018
Sandy Moser	East Brandywine Municipal Authority	3/15/2018
Dennis Mulhern	East Brandywine Tax Collector	3/20/2018
Anthony Damiano	East Brandywine Zoning Chairman	3/20/2018
Steven Rodia	GreenDrake Advisors President	3/24/2018
Andy Heinrich	East Brandywine Traffic Consultant	3/27/2018
David Sweet	East Brandywine Planning Consultant	3/29/2018
Laurel Jordan	Business Banking, PNC Assistant Vice President	3/29/2018
Tony Dragoni	Applecross Homeowner's Association Chairman	4/4/2018
Bonnie Nye	Applecross Homeowner's Association Member	4/4/2018
George Scherbak	Applecross Homeowner's Association Member	4/4/2018
Cary Vargo	Upper Uwchlan Township Manager	4/4/2018
Rick Smith	East Goshen Township Manager	4/5/2018
Joe Edwards	East Brandywine Fire Company	4/11/2018

Name	Title	Date
John Edwards	East Brandywine Fire Company	4/11/2018
Vince D'Amico	East Brandywine Fire Company	4/11/2018
Carl Hogan	East Brandywine Township Auditor	4/12/2018
Mike Mize	East Brandywine Youth Association	4/12/2018
Hudson Voltz	East Brandywine Bondsville Mill Vice Chairman	4/20/2018
Jan Bednarchik	East Brandywine Municipal Authority	4/20/2018
Bill Kay	East Brandywine Township Resident	4/20/2018
Jeff Cantlin	Cedarville Engineering	4/20/2018
Marc Bricker	East Brandywine Focus Group Meeting	5/1/2018
Kim Bobik	East Brandywine Focus Group Meeting	5/1/2018
Dean Moldenhauer, Jr.	East Brandywine Focus Group Meeting	5/1/2018
John Winters	East Brandywine Focus Group Meeting	5/1/2018
Diane Sweeny	East Brandywine Focus Group Meeting	5/1/2018
Beth Ulrich	East Brandywine Focus Group Meeting	5/1/2018
Steve Ulrich	East Brandywine Focus Group Meeting	5/1/2018
Anthony Scalies	East Brandywine Focus Group Meeting	5/1/2018
Joe Scalise	Kennett Square Borough Manager	5/2/2018
Carl Croft	East Brandywine Budget Committee	5/3/2018
Jamie Bruton	Bruton Financial	5/3/2018
Ben Bruton	Bruton Financial	5/3/2018
Lt. Jeffrey Yankanich	East Brandywine Police Lieutenant	5/3/2018
Brian Kulakowsky	Cedarville Engineering	5/3/2018
Rose Jamison	East Brandywine Police Administration	5/3/2018
Jackie Smedley	East Brandywine Police Secretary	5/3/2018
Dale Barnett	West Brandywine Township Manager	5/29/2018
MaryF McGarrity	Sr. VP Chester County Economic Development Council	6/13/2018
Gary Smith	President Chester County Development Council	6/13/2018
East Brandywine Township	Public Town Hall Meeting	6/18/2018

INTRODUCTION

Several preliminary comments before moving forward:

1. We wish to thank members of the East Brandywine Board of Supervisors, the Township administration, the Police & Fire Departments and the many residents who agreed to be interviewed (a few several times) and/or participated in the JUNE 18th Town Hall meeting for their cooperation during this initiative.
2. The report that follows has been written to be consistent with the first directive of the majority of the Board of Supervisors - -including the Board Chair—to be *“as brief as possible but comprehensive, crisp, clear and totally candid in your observations, conclusions and recommendations...”*
3. From the outset of our interviewing process, the high tension *“atmospherics”* emanating from what had been a highly contentious political campaign became patently obvious. Made clear at the very start of a few of the interviews by a manifested suspicion regarding a deep-seated resentment due to the misperceived *“real purpose”* of the initiative, having to do with the future employment of the individuals within Township Management.
4. However, buttressed by the assurance that *“even if you don’t care one way or another, everything you say will be treated ‘totally confidential’ as to source”*, this eventuated in genuine candor and openness on the part of the vast majority of the interviewees...which in turn led to a number of surprising observational comments and suggestions.
5. One other final introductory thought for the Board of Supervisors to reflect on as you review this report: Running throughout the totality of the interviewing process—with the varied stakeholders (e.g. residents, Township departments, services providers/vendors, etc.)—is a common theme that was best characterized accordingly:

“Whether we have lived here forever or just moved here, we love this place and want the best for it...but it’s changing so quickly, it seems like things are out of control...we need effective leadership to help take me...us...into a future that may include things I personally believe we absolutely need to have and things that I don’t personally believe are necessary, but I can accept if I am confident that the decisions have been well thought through, done so with a respect for the public marked by transparency, so we all understand why it makes sense, how it will be paid for and who is best qualified to carry it out.”

PROJECT MANDATE

The mandate of and the process followed during this initiative was effectively summed up below in a recent Township announcement on its website:

East Brandywine: Assessing Where We are as a Township



On February 1, the Board of Supervisors initiated an overall assessment of the state of affairs of East Brandywine Township.

The intent of the study is to provide Township leadership an unbiased overview of a full range of external and internal aspects of East Brandywine, including, but not limited to:

- Municipal operations
- Institutional culture
- Township committees and commissions
- Volunteerism
- Public works
- Fire and police
- Traffic
- Historical sites
- Recreation
- Open space
- Trails
- Communications

This study is not a land development process. It is a holistic review to understand the operations and economics of East Brandywine in 2018.

Leading the study are Richard Pomerantz, a Co-Senior partner in The Strategy Group, Inc., a strategy consultancy and executive leadership coaching organization, and Ray Halvorsen, Senior Partner of Halvorsen Associates, LLC. Richard and Ray gained expertise in the municipal and leadership arenas as part of their service for Westtown and West Goshen Townships. Richard is in his fourth term as chairman of the Westtown Planning Commission. Ray was active in West Goshen for over 30 years. Now

retired, he served as Supervisor for two decades and Director of Public Works. Their knowledge and experience provide them with a unique perspective on township management and operations.

Since February, Richard and Ray have been reviewing voluminous Township documents and reports. Over 60 interviews have been conducted with past and present local business owners, Township committee and commission leaders, the Board of Supervisors, Township management and staff, legal counsel, various Township consultants, and integral municipal departments (Fire and Police) Also included in their review are discussions with other Chester County township managers as they explore for best practices.

In addition, a strategic focus group was conducted with residents and business owners in early May. Participants were able to share thoughts on a variety of points in a private session overseen only by Richard and Ray.

The focus of all interviews and discussions is to gain an insight as to the perceived current strengths, weaknesses, threats, risks, and recommendations of and for East Brandywine.

The penultimate phase of the study will be a public Town Hall meeting open to **all residents** scheduled for June 18th at 7 pm at the Township Building.

At the public Town Hall meeting, Richard and Ray will explain the mandate given by the Board of Supervisors. They will walk through the process they have taken and share some initial consistent strategic themes that have been raised during the process. *Issues will be put on the table for public discussion and debate.*

After this phase is completed, Richard and Ray will prepare a candid assessment of East Brandywine today along with a Five Year Strategic Plan with recommendations. This report will be presented to the Board of Supervisors to review and consider for implementation by management.

The final report will be available for the public to view on the Township website.

STRENGTHS & WEAKNESSES : AN OVERVIEW

- As might be expected, the opinions regarding “*strengths and weaknesses*” expressed by residents, management and staff, service providers, etc. were quite varied and quite often contradictory.
- The “*strengths*” mentioned came relatively quickly: e.g. the appeal and attraction of the Township; the foresight for land preservation; parks/recreation; the professionalism of the fire department and police force; the Mile Marker; the Downingtown School district etc.
- Regarding “*weaknesses*” EVERYONE mentioned traffic. After confidentially was assured, there were several other “*weaknesses*” frequently mentioned: the intensity of the split (new/younger versus older/long-time Township Residents); unequal treatment of the newer/younger residents; lack of an overall vision to deal with the dramatic growth of the Township; lack of commercial base; poor communication skills of senior township management; etc.
- These and other subject matters are dealt with in separate sections in this report.

EAST BRANDYWINE'S VISION/MISSION/VALUES STATEMENT

OBSERVATIONS/FINDINGS

- In contrast to the majority of the other Chester County township municipalities whose managers were interviewed for this project, to the best anyone employed by or residing in East Brandywine Township can recall, the Township has never put in place a vision and/or mission and/or values statement.
 - Which are characterized as “*best practice*” municipal management necessities by both long term and relatively new Township Managers.
 - *“I was one of those who would admit to being skeptical when the Board of Supervisors took this on as a priority. Today I will tell you after all the time and effort it took to agree on what we agreed on and how best to express it – and believe me it took a lot of time and effort! - - - I don’t know how you can do without it. For when done right, seeing those words prominently displayed on your walls and your bulletin boards and on your website convey so much more about the character of your municipality and your people.”*
 - *“Having a stated vision and/or mission statement and the values we adhere to that is upfront out in the open tells the person who is not from here and walks into our building who we are, what we hold ourselves out to be and frankly what we expect from those we do business with.”*
 - *“As for our dealings with our residents, they serve as a continual aspirational reminder to those of us who work here, and the Board members who were elected to serve and all the volunteers why we do what we do and what is expected of us in doing so.”*

EAST BRANDYWINE AS A “BRAND”

OBSERVATIONS/FINDINGS

- When asked “*what is the first thing that comes to mind when asked about East Brandywine today?*”, the split “*persona*” of the Township surfaced almost viscerally:
 - Long time residents understandably reminisce back to what the township used to be like for them as a rural/agricultural community.
 - New arrivals compare/contrast their new hometown to what they left behind...less intensely crowded...etc.
 - Both sides characterized the township as a growing “*bedroom community*”
 - Both sides expressed a desire for, “*the township to be able to come up with a self-description that can differentiate East Brandywine from all the other Chester County ‘bedroom communities’*”.

TOWNSHIP ADMINISTRATION

OBSERVATIONS/FINDINGS

- TOWNSHIP MANAGER: Any discussion regarding the Township administration immediately or soon thereafter revolved around Scott, who is credited for his unquestioned strong work ethic, his unbridled commitment to the Township, his intimate knowledge of the Township, etc.
 - That being said, there were questions raised about him being predisposed to unilaterally cross boundary lines between “*policy*” (presumably the purview of the Board of Supervisors) and “*execution/implementation*” (presumably the purview of management)...
 - In addition to a management style at times described by many in terms like “*presumptuous*”, “*arbitrary*”, “*insensitive*” ...and communications skills - according to even those who are his most fervent and loyal supporters - characterized in terms such as “*terrible*” ... “*inept*” ... “*really bad*” ... “*non-communicative*” ... “*rude*” ... “*amateurish*” ... “*unbecoming of someone in his senior management role*”.
 - So much so that several of those interviewed recommended Scott be retained as Township Manager similar to: “*...just don’t have him talking to residents...let him deal with the inside of the Township...give someone else the responsibility to talk to residents.*”
- ASSISTANT TOWNSHIP MANAGER: The overwhelming sentiment was positive regarding the decision to recruit someone to take the load off Scott.
 - However, the views regarding Luke were mixed. Ranging from very favorable to ambivalent.

- Considered smart and credited *“with more modern notions of municipal management,”* questions surfaced regarding the definitional vagueness of his role; his long term commitment to the Township; his at times *“off-handed”* way of communicating characterized more than once as *“arrogant”* or *“snarky”*.
- SECRETARY-TREASURER: Too new in her position to have generated much commentary by residents other than for her professional demeanor...
 - However, with a workload covering four or five different subject disciplines, including financial management responsibilities not necessarily being her strongest core competency as mentioned by those familiar with Mary’s background, concerns of potential burn-out on one hand and unintended consequences of financial errors on the other were mentioned.
 - That being said, EVERYONE of the Township Managers interviewed hold the strongly held opinion that *“in today’s day and age of municipal government, the roles of Township Secretary and Treasurer involve substantively different skills and should be filled by different persons fully imbued with the appropriate skills sets, knowledge and training.”* And *“to combine both in the hands of one person may be unfairly setting up that individual for failure.”*
- THE FRONT OFFICE: There are two overriding questions over the near, mid and long term:
 - Is the Township appropriately structurally organized and adequately staffed up personnel-wise for a municipality that will have grown as dramatically as East Brandywine has from 2007 till today, and even more so within just a few years from now.
 - From those most familiar with the nature of the Township’s organization and staffing, the perception is that it is still

organized and staffed and managed like that of the small tiny rural municipality it once was, rather than organized, staffed and managed to meet the more sophisticated demands and challenges incumbent with a much more experientially diverse growing populace.

- Where many municipalities including those who were interviewed for this project have felt the need to purposefully evolve their operational and resident-relationship cultures to one of a “welcoming ‘customer-friendly’” to everyone, how is the culture of East Brandywine Township (administration in general and front office specifically) characterized?
 - As reflected by what was heard in the interviewing process and at the Township Public Town Hall meeting, at best, opinions are strongly held and unmistakably mixed!
 - With few exceptions viewed as “*I don’t feel unwelcomed*” by those who more likely than not, are long standing residents, and in many cases view themselves to be personal friends of the Township Manager...
 - Conversely, by many others the Township administration with one exception is described along the lines of: “*the attitude there is unfriendly*” ... “*sullen*” ... “*insular*” ... “*they act like they are doing us a favor when we ask for information*” ... “*they tell us to go look it up ourselves*” ... “*their demeanor seems almost like why are you bothering me?*” ... “*unresponsive*” ... “*residents are an inconvenience*” ... etc.

EAST BRANDYWINE FIRE DEPARTMENT

FINDINGS/OBSERVATIONS

- Notwithstanding its volunteer status, the professional pride within the ranks of the Fire Department is palpable.
 - *“I would tell you with full confidence we can match up performance wise, with our training, with our commitment, with any fire department in the Delaware Valley – paid or volunteer”.*
- Consistent with what was heard at the Public Town Hall meeting, the Fire Department enjoyed almost unanimous pride, admiration and respect among those interviewed for this project.
- That being said, several hours of interviews with the Fire Department suggests the relationship between the Fire Department and the East Brandywine Board of Supervisors & administration is less sanguine than the Police Department/Board of Supervisors /Administration relationship:
 - In a word, there is tension.
 - A deep-seated sense of being taken for granted.
 - Intending to and expected by others to continue to *operate* at the same highest of performance levels, it perceives itself being left to fend for itself, as it attempts to reconcile its short and longer term operational (e.g. personnel retention and recruiting challenges and needs; the condition of its building and its equipment; fundraising, etc.)
 - Personnel retention and recruiting: With personnel attrition an inevitability, being able to offer unique quid pro quo *“incentives”* to recruit and maintain personnel *“would be very helpful.”*

- A comprehensive five year plan for the Fire Department is included in the following pages.

East Brandywine Fire Company -- Operating Profit & Loss Statement with Future Forecast

	2018 Forecast	2019 DRAFT	2020 DRAFT	2021 DRAFT	2022 DRAFT	2023 DRAFT	2024 DRAFT	Comments
Income								
4000 Donations								
4001 Civic	3,300	3,300	3,300	3,300	3,300	3,300	3,300	
4002 Commercial	6,367	6,367	6,367	6,367	6,367	6,367	6,367	
4003 Personal	4,415	4,415	4,415	4,415	4,415	4,415	4,415	
Total 4000 Donations	14,082	14,082	14,082	14,082	14,082	14,082	14,082	flat
4100 Fund Raising								
4101 Special Events Income	5,000	5,000	5,000	5,000	5,000	5,000	5,000	
4102 Fund Drive	96,000	96,000	96,000	96,000	96,000	96,000	96,000	
Total 4100 Fund Raising	103,000	103,000	103,000	103,000	103,000	103,000	103,000	flat
4200 Grants								
4201 Federal	-	-	-	-	-	-	-	
4202 Municipal	320,000	403,000	403,000	403,000	403,000	403,000	403,000	Requesting our 2017 Reimb. levels reinstated
4203 State	2,002	5,603	5,603	3,794	-	-	-	Release of deferred grant from 2018 Hose Purchase that was capitalized (see capital budget).
4204 Chester County	-	-	-	-	-	-	-	
Total 4200 Grants	322,802	408,603	408,603	406,794	403,000	403,000	403,000	
4300 Investments Income								
4304 Investment Interest	10,594	-	-	-	-	-	-	
4305 Unrealized Gains & Losses	(19,978)	-	-	-	-	-	-	
Total 4300 Investments Income	(9,384)	-	-	-	-	-	-	
4400 Ancillary Income								
4401 Address Markers	15	-	-	-	-	-	-	
4402 Dues & Membership	511	500	500	500	500	500	500	flat
4406 Sale of Assets	60,760	-	-	-	-	-	-	2018 was sale of Command Unit & Ladder
Total 4400 Ancillary Income	61,286	500	500	500	500	500	500	
4500 Release of Restricted Funds	-	-	-	-	-	-	-	
Total Operating Income	491,796	526,185	526,185	524,376	520,582	520,582	520,582	
Expenses								
5000 Administrative								
5001 Accounting Fees	7,039	7,039	7,039	7,250	7,465	7,692	7,923	
5002 Background Checks	100	100	100	100	100	100	100	
5004 Computer Maintenance & Equipment	5,000	5,000	5,000	5,000	5,000	5,000	5,000	
5006 FIOS Internet	600	600	600	600	600	600	600	
5007 FIOS TV	1,429	1,429	1,429	1,429	1,429	1,429	1,429	
5008 Insurance Package	22,896	23,068	27,760	28,593	29,450	30,334	31,244	This includes 3% +\$4K estimated impact of L49 & 49-2. Need to meet with Insurance & confirm.
5009 Investment Fees	9,853	9,853	10,247	10,657	11,063	11,527	11,988	
5010 Legal Fees	2,000	2,000	2,000	2,000	2,000	2,000	2,000	
5011 Loan interest payments	4,362	37,870	35,578	33,497	31,352	29,139	26,856	From Loan Schedule
5013 Office Equipment & Supplies	1,800	1,800	1,800	1,800	1,800	1,800	1,800	
5014 Postage	150	150	150	150	150	150	150	
5015 Refreshments - Coffee Supplies	750	750	750	750	750	750	750	
5016 Refreshments - Water	1,200	1,200	1,200	1,200	1,200	1,200	1,200	
50xx Consultant Services	-	-	10,000	10,000	-	-	-	- Strategic Planning & Building Expansion Plans
Total 5000 Administrative	56,679	90,659	103,653	103,027	92,383	91,720	91,039	
5100 Building and Grounds								
5101 Trustee Monthly Expense	3,600	3,600	3,600	3,600	3,600	3,600	3,600	
5102 Property Maintenance & Repair	13,000	13,000	13,000	13,000	13,000	13,000	13,000	
5103 Landscaping & Snow Removal	2,400	2,400	2,400	2,400	2,400	2,400	2,400	
5104 Housekeeping & Supplies	1,500	1,500	1,500	1,500	1,500	1,500	1,500	
5105 Kitchen Equipment Repair	1,776	1,776	1,776	1,776	1,776	1,776	1,776	
5106 Security	293	293	293	293	293	293	293	
5107 Sewer Use Fee	1,290	1,290	1,290	1,290	1,290	1,290	1,290	
5108 Trash	3,720	3,720	3,720	3,720	3,720	3,720	3,720	
5109 Utilities - Electric	9,000	9,000	9,000	9,000	9,000	9,000	9,000	
5110 Utilities - Fuel Oil	10,800	10,700	10,700	10,700	10,700	10,700	10,700	
5111 Utilities - Propane	2,300	2,300	2,300	2,300	2,300	2,300	2,300	
5112 Utilities - Public Water	1,800	1,800	1,800	1,800	1,800	1,800	1,800	
5113 Utilities - Telephone	2,678	2,678	2,678	2,678	2,678	2,678	2,678	
5114 Special Projects/Equip - Non-Capital	45,408	-	10,000	10,000	10,000	10,000	4,000	conclude on future non-capital equip/projects
Total 5100 Building and Grounds	99,565	54,057	64,057	64,057	64,057	64,057	58,057	
5200 Apparatus Maintenance								
5201 ATV 49	750	750	750	750	750	750	750	
5202 Command 49	2,500	2,500	2,500	2,500	2,500	2,500	2,500	
5203 Command 49-2	3,500	3,500	3,500	3,500	3,500	3,500	3,500	
5204 Command 49-3	3,500	3,500	3,500	3,500	3,500	3,500	3,500	
5205 Engine 49-1	11,500	11,500	11,500	11,500	11,500	11,500	11,500	
520x Engine 49-2	4,000	4,000	4,000	4,000	4,000	4,000	4,000	
5206 Engine 49-5	9,500	9,500	9,500	9,500	9,500	9,500	9,500	
5207 Ladder 49	13,500	4,000	4,000	4,000	4,000	4,000	4,000	
5208 Utility 49	1,500	1,500	1,500	1,500	1,500	1,500	1,500	
5209 QRS 49	1,000	1,000	1,000	1,000	1,000	1,000	1,000	
5210 Trailers	1,000	1,000	1,000	1,000	1,000	1,000	1,000	
5212 Misc. Apparatus Expense	971	971	971	971	971	971	971	
Total 5200 Apparatus Maintenance	49,220	43,720	43,720	43,720	43,720	55,720	55,720	
5400 Emergency Services Operations								
5401 Active Crew expenses	4,200	4,200	4,200	4,200	4,200	4,200	4,200	
5403 Member Health & Wellness	1,500	1,500	1,500	1,500	1,500	1,500	1,500	

	2018	2019	2020	2021	2022	2023	2024	Comments
	Forecast	DRAFT	DRAFT	DRAFT	DRAFT	DRAFT	DRAFT	
5404 Chief's Expense	6,500	5,000	5,000	5,000	5,000	5,000	5,000	
5406 Misc. Apparatus Supplies & Tools	1,000	1,000	1,000	1,000	1,000	1,000	1,000	
5408 QRS 49 Supplies	8,500	5,000	5,000	5,000	5,000	5,000	5,000	
5409 Fire Prevention	4,500	4,500	4,500	4,500	4,500	4,500	4,500	
5410 Equipment Purchase & Repair (Tools)	36,420	13,000	11,000	11,000	11,000	11,000	11,000	2019 - Rope Equipment & Hydra Ram
5411 Haz-mat	500	750	750	750	750	750	750	
5412 Radio equipment	2,350	1,000	2,000	2,000	2,000	2,000	2,000	Batteries / minor radio repair
5413 SAFER Grant disbursements	(80)	-	-	-	-	-	-	
5414 Standby expenses	400	400	400	400	400	400	400	
5415 Training & Conferences	10,000	7,500	7,500	7,500	7,500	7,500	7,500	
5416 Turnout gear	15,000	12,000	12,000	12,000	12,000	12,000	12,000	
5417 Uniforms & Station Wear	12,000	10,000	10,000	10,000	10,000	10,000	10,000	
5418 Vehicle Fuel	-	-	-	-	-	-	-	
5419 QRS Medications	2,000	1,000	1,000	1,000	1,000	1,000	1,000	
Total 5400 Emergency Services Operations	104,790	60,850	65,850	65,850	65,850	65,850	65,850	
5500 Fund Raising Expenses								
5501 Address Markers	-	-	-	-	-	-	-	
5502 Fundraising Events Expenses	7,750	7,750	7,750	7,750	7,750	7,750	7,750	
5503 Fund Drive - Choice Marketing	5,000	5,000	5,000	5,000	5,000	5,000	5,000	
5504 Fund Drive - Postage	2,500	2,500	2,500	2,500	2,500	2,500	2,500	
5505 Fund Drive - PayPal fees	205	205	205	205	205	205	205	
5506 Grant Expenses	-	-	-	-	-	-	-	
Total 5500 Fund Raising Expenses	15,454							
5600 Miscellaneous Expenses								
5601 Contributions / External Tokens of Apprec.	-	-	-	-	-	-	-	
5603 Member Functions	6,750	5,000	5,000	5,000	5,000	5,000	5,000	
5604 Membership & Recruitment	132	132	132	132	132	132	132	
5605 Scholarships	1,000	-	-	-	-	-	-	Program Closed in 2018
5606 Subscriptions & Associations	397	397	397	397	397	397	397	
5607 - Miscellaneous - Other	-	-	-	-	-	-	-	
Total 5600 Miscellaneous Expenses	8,279	5,529	5,529	5,529	5,529	5,529	5,529	
0000 Depreciation Expense	157,554	249,838	227,829	217,738	204,682	198,190	230,682	<i>Fed from Capital Budget</i>
Total Operating Expenses	491,540	525,802	526,093	515,375	491,675	486,527	520,382	
Net Operating Income	245	383	92	9,001	28,907	24,055	300	
8001 - Contributions for Future Periods	-	-	-	9,000	29,000	24,000	-	Unanticipated Future Expenses or Contribution to Separate Building Capital Campaign
8002 - Release of Restricted Funds to Operations	-	-	-	-	-	-	-	
Total Temporarily Restricted Net Activity (TRNA)	-	-	-	9,000	29,000	24,000	-	
Net Income	245	383	92	1	(9)	55	300	

East Brandywine Fire Company Capital Budget

*** note, dates are reflective of the in-service dates (planning/deposits/etc.... typically may be the year prior) ***

Asset #	Asset Description	Acq. Date	Yr	Drop Date	Annual Degr	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
B-4	Improvements	1978	40	2017	\$ 36,796.00	146										
B-5	Improvements	1992	40	2031	\$ 74,282.40	1,857	1,857	1,857	1,857	1,857	1,857	1,857	1,857	1,857	1,857	1,857
B-6	Addition	1993	40	2032	\$ 53,307.28	1,308	1,308	1,308	1,308	1,308	1,308	1,308	1,308	1,308	1,308	1,308
B-7	Roofing	2005	20	2024	\$ 17,907.00	895	895	895	895	895	895	895	895	895	895	895
B-9	Training Containers	2015	20	2034	\$ 36,505.93	825	825	825	825	825	825	825	825	825	825	825
B-10	Second Floor Renovations	2017	20	2036	\$ 21,336.66	1,167	1,167	1,167	1,167	1,167	1,167	1,167	1,167	1,167	1,167	1,167
B-11	Engine Bay Floor Renovation	2017	20	2036	\$ 24,637.00	1,232	1,232	1,232	1,232	1,232	1,232	1,232	1,232	1,232	1,232	1,232
B-12	Boiler Replacement	2019	15	2033	\$ 40,000.00	2,667	2,667	2,667	2,667	2,667	2,667	2,667	2,667	2,667	2,667	2,667
B-13	Air Cascade System	2019	15	2033	\$ 50,000.00	3,333	3,333	3,333	3,333	3,333	3,333	3,333	3,333	3,333	3,333	3,333
B-14	Gear Room Bump Out	2019	20	2038	\$ 400.00	400	400	400	400	400	400	400	400	400	400	400
B-15	Replace Gear Racks	2020	15	2034	\$ 1,000.00	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000
Annual Depreciation						7,631	13,684	14,684	14,684	14,684	14,684	14,684	14,578	13,789	13,789	13,789
Accumulated Depreciation						314,512	330,196	364,880	378,565	394,249	408,933	420,618	434,196	453,985	466,774	479,563

E-5	2004 Pierce Pumper (49-1) VIN 0B559	2004	15	2018	\$ 406,570.00	27,038	27,038	48,902	48,902	48,902	48,902	48,902	48,902	48,902	48,902	24,451
E-9	Saugrey Pumper (49-5)	2012	15	2026	\$ 730,534.95	48,902	48,902	48,902	48,902	48,902	48,902	48,902	48,902	48,902	48,902	48,902
E-30	2023 Chevy Tahoe (Cmd 49-1)	2013	5	2017	\$ 30,979.50	3,098										
E-31	Gear & Equipment	2013	7	2019	\$ 44,539.82	6,360	6,360	3,180								
E-12	2030 Ford Explorer (49-3) Disposed 2018	2014	5	2018	\$ 1,457.61	437										
E-13	Fire Skid Unit for ATV	2014	5	2018	\$ 7,836.25	1,567	784									
E-14	Ladder 48 Upgrades	2014	5	2018	\$ 31,629.31	4,086										
E-15	Turnout Gear	2015	5	2019	\$ 34,284.70	2,857	2,857	1,428								
E-36	E-8-1 Rescue Tool Install	2015	5	2019	\$ 6,088.00	1,218	1,218	609								
E-17	Portable Radios	2016	5	2020	\$ 41,104.00	8,221	8,221	4,111								
E-18	QRS-49-2016	2016	5	2020	\$ 80,562.81	17,913	17,913	8,956								
E-29	Radios	2016	5	2020	\$ 27,600.00	5,520	5,520	2,760								
E-20	Turnout Gear	2016	5	2020	\$ 32,164.79	6,433	6,433	3,217								
E-21	Chevrolet Tahoe 2017 (Cmd 49-2)	2017	5	2021	\$ 52,364.29	10,473	10,473	5,236								
E-22	Industrial Washer / Dryer	2017	5	2021	\$ 3,000.00	3,000	3,000	1,500								
E-28	Fire Hoop for Engine & Ladder	2018	6	2023	\$ 30,620.00	2,802	5,603	5,603	5,603	5,603	5,603	2,802				
E-24	Ladder 48	2019	20	2038	\$ 83,483.00	40,673	40,673	40,673	40,673	40,673	40,673	40,673	40,673	40,673	40,673	40,673
E-25	Engine 49-2	2019	35	2038	\$ 662,548.00	44,170	44,170	44,170	44,170	44,170	44,170	44,170	44,170	44,170	44,170	44,170
E-26	Mobile Radios (Replace FDI System)	2019	30	2028	\$ 22,000.00	2,200	2,200	2,200	2,200	2,200	2,200	2,200	2,200	2,200	2,200	2,200
E-27	Command 49-3 (IM)	2019	7	2019	\$ 60,000.00	4,286	8,571	8,571	8,571	8,571	8,571	8,571	8,571	4,286		

Future Equipment Replacements																
E-28	Replace Holman Rescue Truck	2020	8	2027	\$ 50,000.00		6,250	6,250	6,250	6,250	6,250	6,250	6,250	6,250	6,250	6,250
E-29	Command 49-1 (E)	2021	7	2027	\$ 60,000.00		8,571	8,571	8,571	8,571	8,571	8,571	8,571	8,571	8,571	8,571
E-30	Utility 49	2021	7	2027	\$ 70,000.00		10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000
E-31	QRS 49	2022	7	2028	\$ 60,000.00		8,571	8,571	8,571	8,571	8,571	8,571	8,571	8,571	8,571	8,571
E-32	Command 49-2 (VO)	2024	7	2030	\$ 8,571.48		8,571	8,571	8,571	8,571	8,571	8,571	8,571	8,571	8,571	8,571
E-33	Engine 49-1 (Resour)	2024	15	2038	\$ 800,000.00		53,333	53,333	53,333	53,333	53,333	53,333	53,333	53,333	53,333	53,333
E-34	ATV 49	2026	20	2045	\$ 10,000.00		500	500	500	500	500	500	500	500	500	500
E-35	Engine 49-5	2028	15	2042	\$ 800,000.00		53,333	53,333	53,333	53,333	53,333	53,333	53,333	53,333	53,333	53,333

Annual Depreciation						348,923	335,648	213,145	203,054	189,998	183,511	215,948	239,813	236,027	207,291	213,352
Disposals																
Accumulated Depreciation						1,392,532	1,626,180	1,841,325	2,044,379	2,234,377	2,417,888	2,638,836	2,873,649	3,109,676	3,336,967	3,528,318

Total Annual Depreciation Expense on Operating Budget - 157,554 249,333 227,829 217,738 204,682 198,196 230,632 254,391 249,816 221,080 225,141

EMC Capital Budget / Fixed Asset Schedule

As of 6/3/2018

EAST BRANDYWINE POLICE DEPARTMENT

FINDINGS/OBSERVATIONS

- Notwithstanding its internal personnel problems, with few exceptions throughout the interviewing process and again overwhelmingly reflected at the public Town Hall meeting, the Police Department is respected and held in esteem by the community.
- Any of the complaints or criticism revolve around questioning the size of the force and what some perceive is the Police Department being overly aggressive stopping cars.
- From interviews, it is apparent the Chief recognizes the importance of succession planning to allow for the smoothest of transitions should the need arise unexpectedly and holds “*an ongoing tutorial*” almost daily with his new “*second-in-command*”.
- A comprehensive five year Police Department plan follows.

EAST BRANDYWINE TOWNSHIP POLICE DEPARTMENT

5 YEAR PROJECTION REPORT

Prepared for “The Strategy Group”



Prepared by: Chief of Police Mark D. Kocsi

Date: May 17, 2018

EAST BRANDYWINE TOWNSHIP POLICE – 5 YEAR PLAN PROJECTION

INTRODUCTION:

As part of a management / operations study being completed by consulting firm, The Strategy Group, the consultants have requested a limited and narrow five year projection plan from the Police Department. The plan is to include projections regarding manpower, equipment replacements and operational needs. Projections will be based on information available, at the time of this report, and are only meant to act as a guideline for determining the minimal needs over the next five years. Typically, five year projections need to be reviewed and adjusted each year, in order to maintain efficient and effective operations.

For purposes of this report, I will break the projections down in to three main categories. The categories will include manpower, major operational purchases / replacements and daily operational expenses. A copy of the present Police budget is included in this report and is color coded to the specific category.

DAILY OPERATIONAL EXPENSES:

For the most part, daily operational expenses have remained the same or slightly higher than in past years. These items may see a nominal increase each year and I do not expect that these items would see considerable change in the next five years. These expenses include everything other than contractual related costs (Police contract) and major equipment costs (capital reserve). Examples of these expenses include computers, computer software and records management programs, IT support, office supplies, building expenses, all vehicle related maintenance and operational expenses, uniforms and weapons maintenance. These are many and are color coded orange in the attached budget list.

MAJOR OPERATIONAL EXPENSES / CAPITAL RESERVE:

A few years ago at the recommendation of the Township Budget Committee, a capital reserve account was set up for the Police Department, Highway Department and the Township. The Board of Supervisors, based on information provided by the committee, decided that these accounts were to be funded each year at levels that would help maintain and fund major purchases identified in “five year plans”. As an example, the Police Department’s funded amount was approved at \$ 100,000 dollars each year. The capital reserve budget for the Police

Department includes police vehicles, ballistic vests and weapons, computer servers and upgrades, and major vehicle equipment such as Mobile Video Recorders and body cams. A typical capital reserve purchase is an item over \$ 5,000 dollars and requires prior Board of Supervisors approval.

In regards to the five year plan, 2018 is the start of the next vehicle replacement program, as most of the Police Department vehicles will be four years old or older through this five year period. Replacements of two or three vehicles per / year will continue for the next three to four years. I do not anticipate needing to increase the number of vehicles in the fleet, unless we take on another municipality. Major equipment in the vehicles should be sufficient for the most part. However, I do anticipate needing to replace the mobile video camera systems and its' computer server towards the end of the five year mark. Our Police Department computer server and its' operational systems were replaced two years ago. I anticipate needing to replace both also towards the end of the five year mark. Ballistic vest replacement begins in 2019 through 2020. We were awarded a 50% matching grant to assist with 2019. An additional grant will be applied for in 2020. We have money allocated for body cameras but this program has not been finalized. The purchase of a license plate reader has been approved for this year at a cost of \$ 25,000 dollars. I do not anticipate any other major capital reserve needs.

**The most important thing, for the Police Department regarding these expenses, is that as long as the approved funding of \$ 100,000 per year is allocated to the capital reserve, I should have no problem being able to plan, execute and maintain, the most expensive items in our budget over the next five years. However, this funding level has not been maintained at a consistent rate. Capital Reserve items do not appear in the Police Operations Budget and are listed separately each year as an addendum to the draft budget. A copy of the Police Capital Reserve balance is attached and highlighted in green.

MANPOWER:

Manpower is the most expensive and pressing concern for the Police Department. The 2018 Police budget allocated funding for 15 full-time and 1 part-time sworn personnel and 1 full-time and 1 part-time non-sworn (secretarial) personnel. Due to multiple disciplinary issues in 2018, the Police Department has not been able to fill the funded manpower levels this year.

In July of 2016, the U.S. Census Bureau estimated East Brandywine Township's population to be at 8,409 residents. As of this report, everyone in the Township Administration agrees that this number is higher. Additionally, information provided by the Township indicates that, at this time, there are 801 residential dwellings in planning. When the Chester County

per/household calculation of 3.2 persons/per household is figured into the projected homes, we add another 2,563 residents to the Township. Note, this is before we look at a five year projection. Minimally, East Brandywine Township's population could reach 10,972 residents within this five year projection.

The International Chiefs of Police and the FBI provide manpower calculation formulas which are widely accepted practices throughout the United States. I have found that the FBI formula typically estimates manpower higher than the IACP formula. Regardless, Police Administrators use these formulas as guidelines to review, plan and implement proper manpower allocations to meet their specific needs and jurisdictions. For 2018, East Brandywine Township Police, per both formula calculations, should be staffed at 20+ full-time sworn officers. This is using the population of 8,409. It is my opinion that the Police Department does not need 20+ full-time officers. However, it is also my opinion that within the next five years we will, without a doubt, need 1-4 additional officers. Investigations and patrol coverage are very pressing needs for the Department, as we are experiencing struggles with certain areas of our operations. One other area I am keeping a close eye on is the increase in commuter traffic through the Township. Development in the western part of the County is effecting the Route 322 corridor through East Brandywine. Traffic complaints have increased steadily over the last few years and I expect that will continue.

One important note. The Police Department is in what I refer to as a "transition period." Some of the older officers at the highest pay and benefits levels will be leaving or have retired. New officers hired at lower pay rates and benefits naturally allow a lowering of the budget. However, negotiations regarding a new collective bargaining agreement will commence in 2020 for the 2021 year. It will be important for the Board of Supervisors to realize that the Police Department will need to add manpower during this time. Traditionally, I have recommended we do so slowly each year as to not create a financial hardship in any one year. How we plan and implement these changes during a contract year will be extremely important.

Attached to this report is a present, and five year manpower projection chart, using the IACP and FBI formulas'. The top figures represent total manpower calculated using the formula. The bottom represents my professional opinion on what is reasonable in order to properly protect and serve the community. Please note that I have only taken in to account residential growth and not commercial. At the time of this report there are no other major commercial developments other than the Giant project which would call for additional manpower. I would be more than happy to discuss this further if needed.

CLOSING:

East Brandywine Township has been identified as one of the fastest growing municipalities in Chester County. Outside of a national economic downturn, I expect that our growth as a Township will continue. As the Police Chief, I am charged with protecting the residents and business owners of the Township. I have always strived to be both financially responsible and reasonable with budget planning and requests. Each year, the Police Department has operated within its approved budget and money has always been returned to the general fund at years' end. I pride myself on knowing that the Police Department budget is one of the lowest of the surrounding municipalities when you compare the Police budget to the general fund. I will continue to work with the Board of Supervisors and remain diligent in my efforts to be financially responsible to the taxpayers. Proper funding of our capital reserve account, controlled annual increases to our operational budget and maintaining staffing levels at a reasonable and controlled rate will help assure that the Police Department will remain financially responsible and will be able to function effectively and efficiently through the next five years.

Respectfully submitted,

Mark D. Kocsi, Chief of Police

EAST BRANDYWINE TOWNSHIP POLICE DEPARTMENT: Staffing Levels and Projections

Population as of July 1, 2016: 8,409 residents. U.S. Census Bureau

Potential population increase as of now: 801 homes x 3.2 (household) = 2563 new residents. Data supplied by Twp. Manager Scott Piersol on present developments.

Formula Staffing:

Position	PA / 1.9 patrol / 1k	2023	FBI NE / 2.2 / 1k	2023
Residents	8,409	10,972	8,409	10,972
Chief	1	1	1	1
Lieut / Accred	1	1	1	1
Adm Sgt / Crpl	0	1	0	1
Detective	1	2	1	2
FT Patrol	16	21	19	24
PT Patrol				
Traffic Unit				
Total PD	20	26	22	29

Proposed plan for 5 years:

Position	2018	2020	2023
Chief	1	1	1
Lieut / Accred	1	1	1
Admin Sgt / Crpl	0	0	1
Detective	1	2	2
FT Patrol	12	12	14
PT Patrol	1	2	2
Traffic Unit	0	?	?
Total PD	15 FT 1 PT	16 FT 2 PT	19 FT 2 PT

05/2018

10:20 AM
05/19/18
Cash Basis

East Brandywine Township
Profit & Loss Budget Performance-01 General Fund
January 1 through April 19, 2018

	Jan 1 - Apr 19, 18	\$ Over Budget	% of Budget	Jan 1 - Apr 19, 18	YTD Budget	\$ Over Budget	% of Budget	Annual Budget
405.124 - Administrative Asslt., Taraschi	11,416.40	-25,699.60	30.8%	11,416.40	37,118.00	-25,699.60	30.8%	37,118.00
405.125 - Secretary-Treasurer, State	12,089.20	-37,941.80	24.1%	12,089.20	50,000.00	-37,941.80	24.1%	50,000.00
Total 405.12 - Salaries & Wages	43,133.92	-108,053.08	28.5%	43,133.92	151,187.00	-108,053.08	28.5%	151,187.00
Total 405.00 - Non-Uniform Salaries	43,133.92	-108,053.08	28.5%	43,133.92	151,187.00	-108,053.08	28.5%	151,187.00
406 - Other General Government Admin								
406.24 - General Operating Supplies	22,927.29	-32,072.71	41.7%	22,927.29	55,000.00	-32,072.71	41.7%	55,000.00
406.32 - Communication	2,354.17	-11,645.83	18.8%	2,354.17	14,000.00	-11,645.83	18.8%	14,000.00
406.34 - Advertising and Printing	7,930.15	-22,069.85	28.4%	7,930.15	30,000.00	-22,069.85	28.4%	30,000.00
406.35 - Insurance and Bonding	8,322.00	-7,222.00	75.5%	8,322.00	1,100.00	7,222.00	75.5%	1,100.00
406.36 - Postal Central (SPCA)	597.30	-4,062.70	18.7%	597.30	5,000.00	-4,062.70	18.7%	5,000.00
406.45 - Contract Svcs. (Copy Equipme	5,907.19	-6,392.81	48.7%	5,907.19	12,000.00	-6,392.81	48.7%	12,000.00
406.46 - Meetings, Conf. & Ed.	3,722.54	-222.54	106.4%	3,722.54	3,500.00	222.54	106.4%	3,500.00
406.47 - Management Consulting	40,000.00	0.00	100.0%	40,000.00	40,000.00	0.00	100.0%	40,000.00
Total 406 - Other General Government Admin	91,800.64	-28,799.36	76.1%	91,800.64	120,600.00	-28,799.36	76.1%	120,600.00
408 - Engineering Services								
408.30 - Engineering Special Projects	37,333.99	-12,665.01	74.7%	37,333.99	50,000.00	-12,665.01	74.7%	50,000.00
Total 408 - Engineering Services	37,333.99	-12,665.01	74.7%	37,333.99	50,000.00	-12,665.01	74.7%	50,000.00
409 - General Government Bldg & Plant								
409.20 - Building Supplies	2,730.93	-10,269.07	21.0%	2,730.93	13,000.00	-10,269.07	21.0%	13,000.00
409.23 - Heating Fuel	11,615.63	-1,181.63	78.8%	11,615.63	15,000.00	-3,184.37	78.8%	15,000.00
409.35 - Public Water	2,817.12	-5,182.87	35.2%	2,817.12	8,000.00	-5,082.88	35.2%	8,000.00
409.36 - Electric	13,151.85	-56,848.14	26.3%	13,151.85	50,000.00	-40,948.14	26.3%	50,000.00
409.37 - Repairs & Maintenance/Township	5,636.60	-44,063.40	11.5%	5,636.60	50,000.00	-44,063.40	11.5%	50,000.00
Total 409 - General Government Bldg & Plant	38,552.14	-99,447.86	26.9%	38,552.14	138,000.00	-99,447.86	26.9%	138,000.00
Total 400-409 - General Government	379,053.03	-440,570.97	46.2%	379,053.03	819,634.00	-440,570.97	46.2%	819,634.00
410 - Police								
410.12 - Salaries and Wages:								
410.12A - Chief of Police / M. Kocsi	38,931.20	-47,598.80	30.8%	38,931.20	126,530.00	-47,598.80	30.8%	126,530.00
410.12B - Police Corporal / S. Leifholt	0.00	-84,706.13	0.0%	0.00	84,706.13	-84,706.13	0.0%	84,706.13
410.12C - Police Corporal / G. Mooney	28,866.02	-65,840.11	30.5%	28,866.02	94,706.13	-65,840.11	30.5%	94,706.13
410.12D - Police Corporal / M. Tweedell	18,485.18	-76,220.95	19.5%	18,485.18	94,706.13	-76,220.95	19.5%	94,706.13
410.12E - Police Corporal / J. Ferraro	28,971.02	-65,735.11	30.6%	28,971.02	94,706.13	-65,735.11	30.6%	94,706.13
410.12G - Police Lieutenant / S. Tyre	28,606.63	-61,247.32	31.5%	28,606.63	89,873.95	-61,247.32	31.5%	89,873.95
410.12H - Patrol Detective / D. O. Suberski	32,588.80	-73,331.20	30.8%	32,588.80	105,920.00	-73,331.20	30.8%	105,920.00
410.12I - Patrol Officer / B. Sheppard	25,953.04	-62,910.51	30.2%	25,953.04	89,873.95	-62,910.51	30.2%	89,873.95
410.12J - Patrol Officer / J. Hayes	27,719.22	-62,736.07	30.8%	27,719.22	89,873.95	-62,736.07	30.8%	89,873.95
410.12K - Patrol Officer / J. Lanzetta	6,509.00	-55,194.73	31.2%	6,509.00	89,873.95	-55,194.73	31.2%	89,873.95
410.12L - Patrol Officer / C. Hamshack	29,866.02	-62,423.98	31.2%	29,866.02	89,873.95	-62,423.98	31.2%	89,873.95
410.12M - Patrol Officer / M. Rae	22,591.38	-59,102.74	29.8%	22,591.38	82,759.00	-59,102.74	29.8%	82,759.00
410.12N - Patrol Officer / J. Lemus	24,656.25	-51,595.62	30.4%	24,656.25	82,759.00	-51,595.62	30.4%	82,759.00
410.12P - Patrol Officer / M. Lemus	23,266.62	-55,728.18	29.5%	23,266.62	79,015.00	-55,728.18	29.5%	79,015.00
410.12Q - Police Sergeant / R. Jamison	9,207.00	-27,793.00	24.9%	9,207.00	37,000.00	-27,793.00	24.9%	37,000.00
410.12R - Police Secretary / R. Jamison	15,551.20	-35,852.80	30.3%	15,551.20	51,404.00	-35,852.80	30.3%	51,404.00
410.12S - PT Secretary / J. Smedley	7,721.35	-18,026.65	30.0%	7,721.35	25,750.00	-18,026.65	30.0%	25,750.00
Total 410.12 - Salaries and Wages	356,636.02	-1,106,373.25	26.4%	356,636.02	1,503,009.27	-1,106,373.25	26.4%	1,503,009.27
410.18 - Overtime & Other Compensation								
410.18A - Police Overtime	19,610.69	-14,899.31	56.8%	19,610.69	34,500.00	-14,899.31	56.8%	34,500.00
410.18B - Shift Differential	3,299.80	-9,700.20	25.4%	3,299.80	13,000.00	-9,700.20	25.4%	13,000.00
410.18C - Longevity	0.00	-7,000.00	0.0%	0.00	27,000.00	-27,000.00	0.0%	27,000.00
410.18D - Sick Bonus	7,500.00	-2,500.00	75.0%	7,500.00	10,000.00	-2,500.00	75.0%	10,000.00
410.18E - Vacation/Chart Buyout	11,669.48	-18,330.52	38.9%	11,669.48	30,000.00	-18,330.52	38.9%	30,000.00

**East Brandywine Township
Profit & Loss Budget Performance-01 General Fund**
January 1 through April 19, 2018

	Jan 1 - Apr 19, 18	\$ Over Budget	% of Budget	Jan 1 - Apr 19, 18	YTD Budget	\$ Over Budget	% of Budget	Annual Budget
Total 410.18 - Overtime & Employer-Paid WHldg	42,078.97	-72,420.03	36.8%	42,078.97	114,500.00	-72,420.03	36.8%	114,500.00
410.19A - Benefits & Employer-Paid WHldg	22,343.21	-73,656.79	23.3%	22,343.21	96,000.00	-73,656.79	23.3%	96,000.00
410.19B - MED-TAX	11,341.27	-11,158.73	50.4%	11,341.27	56,500.00	-11,158.73	50.4%	56,500.00
410.19C - TWP Share Unfunded MCO	0.00	-56,471.00	0.0%	0.00	56,471.00	-56,471.00	0.0%	56,471.00
410.19D - State Share Unfunded MCO	0.00	-131,239.00	0.0%	0.00	131,239.00	-131,239.00	0.0%	131,239.00
410.19E - Health/Medical Expenses	74,440.85	-178,959.15	28.4%	74,440.85	263,400.00	-178,959.15	28.4%	263,400.00
410.19G - Misc. Medical Expenses	2,350.00	1,360.00	236.0%	2,350.00	1,000.00	1,350.00	236.0%	1,000.00
410.19H - Misc. Retirement	4,570.16	-18,929.84	19.4%	4,570.16	23,500.00	-18,929.84	19.4%	23,500.00
410.19J - Dental	4,000.00	-9,500.00	23.2%	4,000.00	12,000.00	-8,000.00	25.2%	12,000.00
410.19K - Liability/Auto/Prof. Insurance	4,000.00	-18,996.94	17.4%	4,001.06	23,000.00	-18,998.94	17.4%	23,000.00
410.19L - Workman Comp. Insurance	4,000.00	-18,996.94	17.4%	4,001.06	23,000.00	-18,998.94	17.4%	23,000.00
410.19M - Life/Disability Insurance	42,981.82	-29,018.18	58.9%	42,981.82	72,000.00	-29,018.18	51.1%	72,000.00
410.19N - School/Training/College Reim.	2,531.07	-18,468.93	12.1%	2,531.07	12,000.00	-16,468.93	12.1%	12,000.00
410.19O - Other	0.00	-12,000.00	0.0%	0.00	12,000.00	-12,000.00	0.0%	12,000.00
Total 410.18 - Overtime & Employer-Paid WHldg	183,726.44	-565,385.55	24.5%	183,726.44	749,110.00	-565,385.55	24.5%	749,110.00
410.21 - PD Office Supplies	10.00	-190.00	5.0%	10.00	200.00	-190.00	5.0%	200.00
410.21A - Stationery	0.00	-750.00	0.0%	0.00	750.00	-750.00	0.0%	750.00
410.21B - Printing	337.20	-1,152.80	22.9%	337.20	1,500.00	-1,162.80	20.6%	1,500.00
410.21C - Office Supplies	3,003.79	503.79	120.2%	3,003.79	2,500.00	503.79	120.2%	2,500.00
410.21D - Office/Furniture	0.00	-1,000.00	0.0%	0.00	1,000.00	-1,000.00	0.0%	1,000.00
Total 410.21 - PD Office Supplies	3,340.99	-2,403.01	58.1%	3,340.99	5,750.00	-2,403.01	58.1%	5,750.00
410.22 - Postage	10.00	-190.00	5.0%	10.00	200.00	-190.00	5.0%	200.00
410.22A - General Operating Supplies	8,178.37	-1,821.63	81.8%	8,178.37	10,000.00	-1,821.63	81.8%	10,000.00
410.22B - Support/Rec'd. Services	0.00	-500.00	0.0%	0.00	500.00	-500.00	0.0%	500.00
410.22C - Maintenance/Repair	5,969.87	-8,030.13	39.9%	5,969.87	15,000.00	-8,030.13	39.9%	15,000.00
410.22D - Car Washing	34.50	-2,000.00	6.9%	34.50	500.00	-465.50	6.9%	500.00
410.22E - Major Vehicle Equipment	0.00	-2,000.00	0.0%	0.00	2,000.00	-2,000.00	0.0%	2,000.00
410.22F - Minor Vehicle Supplies	214.65	-1,785.35	10.7%	214.65	2,000.00	-1,785.35	10.7%	2,000.00
410.22G - Vehicle Collision Repairs	1,143.50	-656.50	57.2%	1,143.50	2,000.00	-856.50	57.2%	2,000.00
410.22H - Police Radios	0.00	-500.00	0.0%	0.00	500.00	-500.00	0.0%	500.00
410.22I - Radio Maintenance	70.77	-679.23	9.4%	70.77	750.00	-679.23	9.4%	750.00
410.22J - Petty Cash	250.00	-750.00	25.0%	250.00	1,000.00	-750.00	25.0%	1,000.00
410.22K - Computer/Equip. Expense	539.62	-2,260.38	19.3%	539.62	2,800.00	-2,260.38	19.3%	2,800.00
410.22L - Computer Repairs/Purchase	194.99	-1,355.01	11.0%	194.99	1,500.00	-1,355.01	11.0%	1,500.00
410.22M - IT Professional Services	2,109.90	-5,000.00	0.0%	2,109.90	5,000.00	-5,000.00	0.0%	5,000.00
410.22N - Education/Training	1,593.00	-9,417.00	25.4%	1,593.00	8,000.00	-9,417.00	25.4%	8,000.00
410.22O - Publications	0.00	-1,000.00	0.0%	0.00	1,000.00	-1,000.00	0.0%	1,000.00
410.22P - Prisoner Cell Fee	2,000.00	-500.00	100.0%	2,000.00	2,000.00	-500.00	100.0%	2,000.00
410.22Q - Investigation/New Equipment	0.00	-500.00	0.0%	0.00	500.00	-500.00	0.0%	500.00
410.22R - Supplies	0.00	-500.00	0.0%	0.00	500.00	-500.00	0.0%	500.00
410.22S - Police/Arrest/Crime Scene Expens	0.00	-500.00	0.0%	0.00	500.00	-500.00	0.0%	500.00
410.22T - Police/Arrest/Crime Scene Expens	0.00	-500.00	0.0%	0.00	500.00	-500.00	0.0%	500.00
410.22U - Evidence Room IT Support	0.00	-500.00	0.0%	0.00	500.00	-500.00	0.0%	500.00
410.22V - Drug Scan	235.00	-350.00	118.0%	235.00	2,000.00	-1,765.00	11.8%	2,000.00
410.22W - New Police Equipment	830.00	-1,750.00	8.3%	830.00	10,000.00	-9,170.00	8.3%	10,000.00
410.22X - Traffic Enforcement Equipment	0.00	-500.00	0.0%	0.00	500.00	-500.00	0.0%	500.00
410.22Y - Vascuar/AccuTrak/Ennadd calibrat	398.00	-1,102.00	26.5%	398.00	1,500.00	-1,102.00	26.5%	1,500.00
410.22Z - Weapons Maintenance	122.00	-878.00	12.2%	122.00	1,000.00	-878.00	12.2%	1,000.00
410.22AA - Ammo/Targets	861.18	-638.82	57.4%	861.18	1,500.00	-638.82	57.4%	1,500.00
410.22AB - Range Fee	0.00	-350.00	0.0%	0.00	350.00	-350.00	0.0%	350.00
410.22AC - Uniforms/Equipment	3,950.77	-549.23	87.9%	3,950.77	4,500.00	-549.23	87.9%	4,500.00
410.22AD - Uniform Allowance	5,900.00	-8,700.00	37.8%	5,900.00	15,600.00	-8,700.00	37.8%	15,600.00
410.22AE - Dry Clean Expenses	776.79	-3,223.21	19.4%	776.79	4,000.00	-3,223.21	19.4%	4,000.00
410.22AF - Youth Aid Panel	0.00	-500.00	0.0%	0.00	500.00	-500.00	0.0%	500.00
410.22AG - Community and Youth Projects	67.50	-1,432.50	4.5%	67.50	1,500.00	-1,432.50	4.5%	1,500.00

**East Brandywine Township
Bank Account Balances**
As of February 15, 2018

02/15/18
Cash Basis

	Feb 15, 18
ASSETS	
Current Assets	
Checking/Savings	
100.00 - General Fund Bank Accounts	848,998.88
101.00 - General Checking-DNB 1st	
102.00 - General Fund Investment	
102.01 - Township Capital Reserve	26,756.16
102.02 - Public Works Capital Reserve	565,796.43
102.03 - Police Dept. Capital Reserve	194,342.89
102.00 - General Fund Investment - Other	1,594.00
Total 102.00 - General Fund Investment	788,489.48
Total 100.00 - General Fund Bank Accounts	1,637,488.36
105.00 - Special Revenue Bank Accounts	
107.00 - State Fund Bank Accounts	
107.01 - State Fund-DNB 1st	391,210.14
Total 107.00 - State Fund Bank Accounts	391,210.14
108.00 - Referendum Open Space-DNB 1st	2,102,696.57
109.00 - Open Space-DNB 1st	688,686.08
110.00 - Traffic Impact-DNB 1st	1,329,415.94
Total 105.00 - Special Revenue Bank Accounts	4,512,008.73
Total Checking/Savings	6,149,497.09
Total Current Assets	6,149,497.09
TOTAL ASSETS	6,149,497.09
LIABILITIES & EQUITY	0.00

FINANCIAL REPORTING/ACCOUNTING

FINDINGS/OBSERVATIONS

- The Township uses QuickBooks for its accounting and financial reporting process.
- For the purposes of this section of the report, Township Managers interviewed for this project shared their respective financial reporting and accounting “packages” for us to review.
- The following represent several of the verbatim comments from township managers and accounting professionals interviewed for this project:
 - *“QuickBooks has its place and serves its purpose well for small businesses and personal financial reporting needs. And presumably that may be how East Brandywine’s Board of Supervisors and Management till NOW has or still does perceive(s) itself. In their position, I’d have reviewed things differently long ago: I’d see myself as the financial stewards of a very fast growing multi-million dollar enterprise who need to be able to know exactly where to go in the financial and accounting report managing and providing effective oversight.”*
 - *“Look, let me say first that it’s not that QuickBooks doesn’t necessarily do the job; but it is neither efficient nor is it helpful in helping you know where every dollar is going, how it relates to your budgeting of every single piece of your Township, etc.”*
 - *“I am not suggesting this to be the reasoning behind using anything other than almost every municipality I know of in this state uses, but IF I preferred not to be as easily transparent with the financial*

reporting side of my business, I'd find one of these types of homey quick book approaches."

- *"There is absolutely no logic at all NOT to be using the more acceptable recommended municipal financial reporting packages."*
- *"I am expected and want and need to be prepared to be able to walk my Board of Supervisors thru every facet of my Township laid out in an intelligible, efficient, understandable manner...The very first thing I'd do today there (East Brandywine) is throw out what they do there and bring it up to contemporary municipal financial reporting standards."*
- *"I see this whole subject not just as an accounting thing, but as a way to manage my business, to be elevated to my Board of Supervisors and the best way to ensure if something were to happen to me, someone could take over and see how we manage every aspect of our operation, our budget benchmarks, so on and so forth."*

TRAFFIC

FINDINGS/OBSERVATIONS

- It would come as no surprise that the traffic situation generates the most critical reaction from residents: NO ONE among the 70 plus interviewees or at the public Town Hall meeting had anything positive to say.
- There has not been a Township wide traffic study in over 10 years in East Brandywine Township.
- A couple of suggestions to help mitigate a bit of the traffic problem caused by 322 have been proposed... There are two loop roads proposed in East Brandywine Township. The northern loop is unrealistic, due to the fact that there are approved land development plans blocking construction. The decision to construct the lower loop road must be made by the Board of Supervisors soon, before future constraints of future land development projects.
- With the traffic situation generating from anger to frustration to sheer resignation whether it be from residents, past & present Board members, Chester County Economic Development officials, Township management & employees, the police and fire departments, adjoining Township managements, even the East Brandywine Township traffic consultant, in the words (as part of a stakeholder interview for the recently completed Westtown Township Comprehensive Plan) of the PennDot representative responsible for this region: *“if you don’t get in front of PennDot with all the firepower you have at your disposal—not one time, but continuously —you can be assured little or nothing will change...But if you stick with it, it may take longer than you would like, but the pressure might help move you up the ladder...”*

- That being said, what was not heard at all during this initiative for East Brandywine was a concerted effort on the part of all the affected stakeholders including state legislators representing the region to attempt to work together on a long range lobbying effort on PennDot to seriously deal, *“with what is clearly a ludicrous problem”*. One which in due course could deleteriously impact home resale values, over the next five years...
- Said differently: letting things remain static by doing nothing should not be an acceptable option.

HUMAN RESOURCES MANAGEMENT

FINDINGS/OBSERVATIONS

- For non-uniform Township employees, the most recent Employee Relations policy manual was written in 1990.
- For non-uniform Township employees, the most recent Drug and Alcohol policy manual is 22 years old.
- For non-uniform Township employees, there would appear to be no Sexual Harassment/Discrimination-related manual.
- Whilst leaving it to HR specialists' to opine formally, it would appear the Police Department's Employee Relations Manual is comprehensive and updated.
- For non-uniform Township employees, according to those interviewed there is no formal annual job performance goals setting and/or review process.
- For non-uniform Township employees and Municipal commissions, committees and authority, there is no formal ethical standards process.
- According to those interviewed, for non-uniform employees and management, there is no formal Succession Planning process.
 - *“With Scott’s incredible knowledge of almost every detail about this Township, I can only assume that with the hiring of Luke, he is expected by the Board of Supervisors to succeed Scott. Whether Luke*

wants it, or would be qualified to take over in place of Scott in an emergency... especially with Mary Beth (Smedley) gone..."

- According to those interviewed, one of the most significant HR-risks is: *"we are just one employee 'being out' for any considerable period causing serious work overload for the rest of us."*
 - *"Our work has no fully predictable rhythm to it...depends on lots of factors... maybe the Township would do better to have one 'extra' staff to be able to fill in, rather than walking the edge of fearing what would happen if we lost one unexpectedly..."*
 - *"No one wants to admit it, but we are not in the same 'comfortable' position personnel wise than we were just a few months ago ... with a new Secretary Treasurer being forced—due to no fault of her own - - to learn on the job with Mary Beth gone ... the Township growing ... a new relatively inexperienced Board ... with new residents demanding more if only because they are new and don't know what they don't know..."*

PENSION PLANS

FINDINGS/OBSERVATIONS

- This report is not intended to opine on the relative performances of both the non-uniformed and uniformed Pension Plans, as this rightfully fits more appropriately under the purview of pension experts.
- That said, upon review of the respective documentation of both Plans, interviews with both Plan Advisors, Township Managers and investment specialists, here are several points for consideration by the Board of Supervisors.
 - The non-uniformed and uniformed pension plans have different plan advisors.
 - In their respective public documents, each of the firms acknowledge a long-term relationship with a Township official: one handling the pension work for the Township Manager; the other having a relationship with one of the present Board of Supervisors' members.
 - Re: The question: *“What are the pros & cons of a separate Fund advisor for each Plan versus one advisor for both Plans?”*: the Township Managers & outside investment specialists unanimously endorsed the single firm approach ... their rationale being there may be potential economies of scale regarding costs; identical reporting documentation for ease of understanding and review, etc.
 - The two firms would appear to have a slightly different approach/investment strategy ... one acknowledging during the interview to being more aggressive.

- One firm's costs percentage is substantially higher than the other.
- One firm indicated it does not answer questions directly from PLAN PARTICIPANTS ... instead directing them to the Township manager.
- The other firm indicated "*we absolutely are available to answer any questions (from Plan Participants).*"
- A common refrain raised by the Township Managers and outside investment advisors interviewed for this project: If and/or how often the non-uniformed or uniformed pension plans had ever been "*put out for review, if only to determine how each compares both performance and service-delivery wise from competitors*".

BOARD OF SUPERVISORS/ADMINISTRATION RELATIONS

FINDINGS/OBSERVATIONS

- Whilst this report is in no way intended to get in the midst of any relationship issues between the Board of Supervisors & and Township management, it would be inappropriate to not acknowledge that there would appear to be concerns.

- The results of the most recent Board of Supervisors election was received with admitted disappointment by more than one of the employees of the Township.
 - In part due to the almost universally acknowledged *“ugly accusations (directed at Township Management) carried out by social media that swayed the way people voted.”*

 - In part due to perceived unfriendly behavior on the part of an (unnamed) Board of Supervisors member.

 - In part due to the *“close working relationship”* that existed for years between the past Board of Supervisors members and township management ... *“we knew what their vision was ... and frankly felt more comfortable”...*

 - In part due to *“now that they (a new majority) are in control of the Board of Supervisors, they haven’t told us, so we don’t know what their vision is for the Township. You know, it’s one thing to win an election: you can win by telling people what you are against ... but after you are elected, you need to know and communicate what you are for.”*

- In part *“due to the obvious: there may very well be a generational piece in all this”*.
- *“You know it was because of all this Mary Beth (Smedley) decided she didn’t want to stick around and go through any of this.”*
- From interviews with residents including but not limited to a few self-described *“strong supporters”* of senior Township Management, a distinctly different counterpoint surfaced during the interview process:
 - *“I can see that others could hold an equally strong view that (senior Township management) got far too close with the long-time previous Board of Supervisors”...*
 - *“They were all close friends”...*
 - *“There seemed to be little distinction between those who were charged with POLICY making and those responsible for IMPLEMENTATION of the policies ... they looked out for each other ... had each others’ backs for their own personal areas of interest”...*
 - *“The line of employee/oversight boss had disappeared.”*

GUTHRIESVILLE VILLAGE

FINDINGS/OBSERVATIONS

- It is not the appropriate purview of this report to opine on the merits of Guthriesville Village, but rather to shed some light on how it is viewed by residents and others interviewed for this project ... as the subject was raised with every interviewee.

- Whilst not suggesting that those interviewed for this project or the mixed feedback heard at the public Town Hall meeting necessarily reflect what the results of what a formal poll might show, what was heard during the interview process may seem worthy of consideration by the Board of Supervisors:
 - First, the majority of those interviewed did not view Guthriesville as either doable, or feasible, or architecturally appealing for potential developers.

 - Second, even supporters of the initiative viewed 322 being a serious obstacle to overcome.

 - Third, others interviewed expressed ignorance about the proposed project; wanted to know how much money had been expended on it; strongly doubted that after a decade of planning it would ever come to fruition; questioned why so much was being spent on something *“about which there is so little known”*.

 - Fourth, the feedback expressed by others familiar with the comments of developers invited to an open session showcasing the plan, was not positive.

PUBLIC WORKS

FINDINGS/OBSERVATIONS

- STAFFING: Roadmaster, 4 full time employees and 1 part time employee (mainly for snowplowing).
- The responsibilities of the Public Works department include:
 - Maintenance of the 36 miles of Township roadway.
 - Maintenance of approximately 100 acres of Township parkland.
 - In addition the Roadmaster is responsible for ordering materials on behalf of the Municipal Authority.
- According to the Public Works employees who participated in a group interview for this project, looking out five years, there is a need for:
 - An additional full time employee,
 - Upgrading of aged equipment, and
 - A need for storage space.
- There are plans for an additional Public Works building in 2019.

RECOMMENDATIONS

- A five year Public Works consisting of the following:
 - The creation of a long term vision which provides proper and effective planning, which will include allowance for needed changes or modifications.
 - As the average life of a roadway is 18 years, the Public Works plan should stipulate that *2.25miles of East Brandywine roadway are to be paved every year.*
 - This 18 year program will ensure a *township wide* roadway upgrade.
 - The Public Works FIVE YEAR PLAN should include the following:
 - With a view to limiting township resident complaints, the Public Works paving program should be carried out and completed during summer months, before the return of school. By doing so, this will mitigate the need for potential township road closures and detour routes.
 - The plan should include an itemized list of Roads to be paved over five years.
 - The plan should include **Yearly** Paving Bids to be advertised no later than April 30th. Reason being: Early bidding will yield more bidders, Bid period takes 3 to 6 weeks including pre-construction meeting.

- The plan also should include the creation of a **Five Year Capital Equipment Plan, for all equipment with a cost of \$5,000.00 value or greater.**
 - A simple spread sheet listing equipment title, year purchased, new or replacement piece and year to be replaced will provide management and Board of Supervisors an easy-to-implement-and-monitor Five Year planning module, and
 - Thus helping to reduce, if not eliminate, the need for unproductive time-consuming annual budget arguments and debates.

APPLECROSS

FINDINGS/OBSERVATIONS

- At various times during the interviewing process Applecross was raised in a couple of seemingly non-sequitur contexts:
 - The notion of a *“them versus us”* and/or *“old versus new”* that was raised during the Town Hall meeting also arose most often during the interview process when the subject of Applecross was raised.
 - Applecross is described by some as a *“‘political interest group’ which helped win the election” ... “new people with money moving into the township with higher expectations...”*
 - Conversely there is a sentiment among some Applecross residents that Township Management *“treats us with dismissive resentment...”*
 - In addition, during the interviewing process, regarding Applecross, much of the tension revolved around questions pertaining to the issue of the *“why and why-nots”* regarding possible Road Dedication to Applecross private streets.

RECOMMENDATIONS

- There would appear to be two options:
 - OPTION 1: Maintain the status quo for the *“owners should have read their contracts before they bought their homes”...*
 - OPTION 2: Whilst Township roadway dedication *is* possible when roads meet acceptable standards, the simple fact is the decorative

curbing throughout Applecross does not meet those acceptable standards and would necessitate constant maintenance. That being said, the paved roadway in Applecross *may have* been constructed to meet specifications,

- If so, assuming there is a genuine desire on the part of all parties to find a workable solution, is it possible that with engineering examination a mutually acceptable solution could be reached between the Township and the Home Owners Association for the Township to accept dedication with an agreement that limits certain maintenance responsibilities?

CEDARVILLE'S RELATIONSHIP WITH EAST BRANDYWINE

FINDINGS/OBSERVATIONS

- This project was aided by the cooperation of two of Cedarville's consultants.
- According to one of the interviewees, the relationship with the Township is a lengthy and close one. Best exemplified perhaps by:
 - One of the consultants interviewed has a permanent office at the Township building and has been *"on the East Brandywine account for thirteen years"*.
 - When asked if the Township *"carries out a performance review with Cedarville based on agreed upon benchmarks for the past year and goal setting with benchmarks for the next year"*, he indicated that had not been his experience and did not know if anyone else at Cedarville did so with East Brandywine.
 - The other consultant interviewed is relatively new to the account ... He provided the following information regarding the firm's work relative to MS4 Stormwater permitting:
 - In December 2017, Cedarville submitted the required 2018 MS4 Permit to DEP, stipulating two projects: An installation of an underground drainage bed at Culbertson Run and a stream restoration.
 - When projects are submitted to DEP, an estimate of the costs is required. More than two weeks after being asked during the interview for the estimated costs, the response was *"this is*

only a guesstimate as we do not know yet, but I'd say in the range of \$400k-\$800k".

- Why is this important? In thinking about a five year plan for East Brandywine—which coincides with the length of time for the permit—upon reviewing the East Brandywine budget, a budget line for these future fund expenses could not be found. This is not to conclusively suggest that the Township has not budgeted for this initiative. But if it has, or if it is in the budget, it is not readily obvious.
- And once permitted, the Township needs to be prepared to follow through with the submittal.

EAST BRANDYWINE TOWNSHIP RESERVE FUNDS

FINDINGS/OBSERVATIONS

- In the present budget, there would appear to be three reserve funds:
 - An Act 209 road improvement fund which could be used to fund a traffic study or possibly traffic light improvements including upgrading Traffic Light Timing Adaption.
 - An Open Space Fund to purchase additional land for active, passive and trails.
 - Parks Reserve Fund which could be used yearly for any and all capital expense pertaining to the Parks Department. Such as, Parks Building, Parks Trucks, Mowers, etc.

RECOMMENDATIONS

- The Board of Supervisors should take care to closely monitor the timing of the disposition of these funds. For failure of these reserve funds being actively spent within the legally proscribed timeframe, can result in potential challenges which could risk loss of these funds.

BONDSVILLE MILL INITIATIVE

FINDINGS/OBSERVATIONS

- Throughout the interviewing process, the reaction to questions regarding the Bondsville Mill was consistent with the comments heard during the public Town Hall meeting ... Ranging from:
 - *“I’ve never heard about it” to “not knowing enough about it to have an opinion”*
 - *“A waste of time and resources” to “I understand this is one of those things being pushed by one of the Supervisors”*
 - *“How can you be supportive of something that has so much history to it?” to “my kids and I have already spent enjoyable time there”*
- It would seem that the most passionate support emanates from those who:
 - Have a keen interest in the historical aspects of East Brandywine,
 - Are passionate proponents for strict Historical Ordinances that some have suggested has stood in the way of commercial endeavors,
 - Are strong advocates for the passive type of preservation that also was mentioned at the Public Town Hall meeting.

- The Board of Supervisors need to decide going forward where financial support for the Bondsville Mill project comes from. Either the Parks Open Space fund or the Township's General Fund.

ECONOMIC DEVELOPMENT/COMMERCIAL FOR EAST BRANDYWINE

FINDINGS/OBSERVATIONS

- Of all the subject matters discussed at the Town Hall meeting, the one most notable surprise was the consistently high (mostly second out of five) “*choice*” by all the groups for more commercialism in East Brandywine Township.
- A surprise because few subject matters generate the range of passionate feedback from residents and/or people who have worked with others who expressed interest and/or themselves have been intent on establishing commercial business in East Brandywine and/or those who work for East Brandywine in one way or another.
- One side of the argument was reflected in similar comments along the lines of:
 - *“If I need something there are plenty of places to shop not far at all from where I live outside of East Brandywine.”*
 - *“If we start to encourage it (more commercialism) here, it will turn into another Exton ... that’s the last thing we need.”*
 - *“What has distinguished East Brandywine from so many other municipalities is we protected the historical uniqueness and natural beauty of this place by not giving into streets dotted by all kinds of businesses that we can otherwise patronize just outside our boundaries.”*
- The other point of view was expressed with equal vigor:

- *“Unfortunately East Brandywine has created for itself an anti-business atmosphere mainly through onerous historical-related ordinances and unnecessary time-consuming and costly delay tactics on the part of Township Management.”*
- *“That an influential minority - - permitted by the Board of Supervisors and enabled by Township management - - has stood in the way and thus prevented things needed in this Township—no matter whether it be a WAWA or a Dunkin Donuts or whatever, is not right.”*
- *“It’s no secret that roadblocks are obviously put up by management instead of saying ‘let’s find a way to make this work’”.*
- *“Here’s the way I look at it from a distance: I don’t live in East Brandywine but am very familiar with it, its leadership over the years, the obvious challenges created by just 322 ... It seems to me that East Brandywine has staked its whole economic future in one basket- - Guthriesville—which they have been dealing with for years ... I personally cannot see that ever being the success they hope it will be ... maybe they know something the rest of us don’t and if it turns out to be success, the proof will have been in the pudding ... But if I were on their Board of Supervisors, I might prefer to take clean page look at other commercial strategies, which would of course have to include a look at your ordinances.”*
- *“With the election of a new Board, presumably they have some thoughts about what direction they want to take our Township ... And that would include their views on this topic ... the problem is I don’t think anyone knows what their vision is.”*

TAX COLLECTION

FINDINGS/OBSERVATIONS

- Since the present Tax Collector took office January 6, 2014, the following key changes have been made in the carrying out of the office's responsibilities:
 - Whereas tax collection services had not used the tax software that had been previously purchased, upon taking office the present Tax Collector has used EBTTAX Software.
 - Whereas upon taking office in January 2014 it became clear two to four year old interim tax notices (2010-2012) from the county to produce Tax invoices had not been expedited in time, from March 2014 onwards – per the Rules & Regulations of Pennsylvania Tax Collectors Association – interim notices have been produced and mailed within 10 business days.
 - Whereas previous year's collections used to be included in current year's collections, and thus distorting current year budget numbers, the new tax collector designed and uses a two page monthly form for payment to the taxing district that eliminates any confusion.
 - Since January 2014, the timing of payments to the General Fund (by close of month or within several days after the collection day of the month) has met PA Tax Collectors Rules & Regulations standards.
- With these changes there has been considerable progress made:
 - 2013 Tax Collections & Fees amounted to 82.4% of collectables.

- Since 2014 Tax Collections & Fees have exceeded 99.1% and still growing: i.e. 2017 collections are 99.92%
- Whereas in 2013 there were 202 Tax Claims in the amount of \$117,000.00+. In year end 2014 there were 24 Tax Claims filed in the amount of \$9,552.48 which included 10% Penalties. These numbers continue to reduce each ongoing year.
- From 1975 through 2013 there were zero valid Municipal Claims filed for fire hydrant, reuse and recycle unpaid fees.
- Since 2014, Municipal Claims are filed for all unpaid fees after producing a 30 Day Certified Notice of Municipal Claim, and a 10 Day USPS Notice of Municipal Claim to be filed. *No unpaid taxes of fees are carried forward to the next calendar year.*
- This has resulted in East Brandywine Township reducing from 434 certified notices in 2014 down to a maximum of 68 certified notices to be produced for 2018.
- Three other notables:
 - All Notices and Municipal Claims are produced electronically by the present Tax Collector with software he designed and wrote himself.
 - Growth in the Township has been over 25% since January 2014 with both the number of parcels and total monies billed and collected.
 - Notwithstanding the Township growth expected to continue for approximately 5 to 7 additional years, according to the present Tax Collector:

- *“With all the systems and processes put in place since 2014, this (the growth) should not cause any problems continuing to collect and invoice the residents. It may however call at some point to hire a part-time Tax Administrator. The high Collection Rate at 99.9%+ looks very promising for the future of East Brandywine Township. Taxes and Fees budgeted for Tax Year 2018 has been collected at the rate of 100%+ by June 29, 2018.”*

ETHICS/PERCEIVED CONFLICTS OF INTEREST

FINDINGS/OBSERVATIONS

- It would be less than candid to not mention this sensitive subject matter. As it has been one of the common “*side-bars*” that has arisen throughout this process.
- Simply put, whether it be what’s already been in the public record for many years and/or private intimations or outright accusations of (perceived or real) unethical activities, the atmosphere within East Brandywine is ripe...e.g.
 - Private (not transparent) “*deal-making*” among “*favored parties*”;
 - Unfair treatment of “*unfavored*” residents or permit applicants;
 - Running afoul of conflicts of interest standards resulting in fines by Pennsylvania regulatory bodies;
 - Behavior edging on harassment of employees
 - Breaching state mandated sunshine laws
 - Etc.
- It serves no good purpose to get into the weeds of what is real versus what is rumor or mere unproven accusation or name calling. Instead the intent is to make a couple of points and several recommendations for the Board of Supervisors to consider:
 - First, to assume that this is an issue that is not already out in the public domain would be naïve. For it very much is: whether it be

already loudly asserted or just in the “*whispering*” stage (and ready to explode) at this point ... a societal function of social media today.

- Second, in addition to what has already been part of the public domain for years, the more recent sources of bad-mouthing is not solely “*partisan*”-based.
- Third, none of this is useful or beneficial for putting the Township in the best and most positive public light going forward.

RECOMMENDATIONS

- **OPTION 1:** don’t make more of the issue than it deserves. In time, it may dissipate.
- **OPTION 2:** whilst recognizing that what has been is “*water under the bridge*” that cannot be undone, the Board of Supervisors consider the following proactive actions to include but not be limited to:
 - Enact legislation that stipulates that NO ONE with a criminal record or has received punishment by a state or any other professional regulatory body can be appointed to serve on an East Brandywine Township Commission or Municipal Authority Board.
 - **All decisions** by the Board of Supervisors must be fully transparent and out in the open. The principle to be followed: IF a decision to allow or disallow can be conducted *outside* the public sphere, it can and should be conducted *out in the open* and stand up to public scrutiny.

- Annualized performance reviews and goal setting with specific benchmarks for the next year for every external service provider and Township employee.
- One consistent 'APPLICATION' for every township commission or committee.
- A minimum of a well-publicized formal public Town Hall meeting two times a year, for the Board of Supervisors to announce how Township management has (or has not) met or is meeting previously agreed upon objectives and prepared to respond to all questions from the public.
- Unless legally impermissible, *all* correspondence to and from the Board and *all* correspondence to and from Township management must be made part of the public domain.
- To eliminate any perception of conflict of interest, no Township management & Board of Supervisors member can sit on the Board of Directors, or Advisory Board of, or be the beneficiary of services (paid or otherwise) provided by any enterprise servicing the Township.
- Every multi-year external service provider relationship with the Township must undergo a formal RFP review process every five years.

THE PRESERVATION OF OPEN SPACE

FINDINGS/OBSERVATIONS

- During the interview process and the public Town Hall meeting, with several caveats that may deserve greater transparency, the Township's foresight for and commitment to preserving Open Space received universal approbation.

- The caveats revolved around questions such as:
 - How much has been spent so far on open space?

 - What if any 'program' is there for how much more will be preserved?

 - What is the decision-making process? What criteria is used?

 - How are the unspent funds handled?

 - Why can't there be greater transparency about the open space program on the website?

ACTIVE/PASSIVE RECREATION

FINDINGS/OBSERVATIONS

- From the interview process as well as the public Town Hall meeting: That the Township residents are generally supportive and proud of the active recreational success of the EBYA relationship (with almost 1,000 participants involved) is undeniable.
- However, from the same feedback several issues surfaced which the Board of Supervisors may want to seriously explore looking forward over the next five years:
 - A quickly growing number of young people (males and females) are partaking in non-baseball or softball sports, such as soccer and lacrosse which may raise questions regarding the number of fields that may be needed for the latter two in the future.
 - How will this impact/will this necessitate reconfiguration of the fields presently in use?
 - Can more land be acquired?
 - Are the “*economics*” (contractual obligations) of the relationship between the Township and the EBYA mutually equitable today? And over the next five years?
 - There was also interest expressed for Board of Supervisors giving priority (including more financial support) for non-active recreation ... especially for older generation residents and families ... for small parks ... trails ... etc.

SUMMARY OF RECOMMENDATIONS

1. ADMINISTRATION & FINANCIAL REPORTING

- Hire Director of Finance/Treasurer
 - Separate duties of Secretary and Treasurer
 - Must have municipal budget experience
 - Budget software system background
 - Perform payroll, payables and receivables
 - Support Tax Claims
 - Replace QuickBooks with software package
- Restructure Secretary position
 - Assistant to Board of Supervisors
 - Supervise administration staff
 - Right to Know Officer
 - Oversee Human Resources
 - Resident relations

2. EAST BRANDYWINE FIRE DEPARTMENT

- Solidify five year joint municipal Financial Agreement between West Brandywine Township, Upper Uwchlan Township and East Brandywine Township with East Brandywine Fire Company.
 - \$491,540.00 yearly expense budget (cf page 18-19)
 - Five year agreement minimum
 - Establish additional separate building fund program

3. HUMAN RESOURCES

- Revise/update Employee Policy Manual
 - Most recent 1990
- Revise/update Drug and Alcohol Policy
 - Most recent 1996
- Establish Harassment Trainings Program a minimum of every two years
- Establish a yearly Employment Review Policy, replaces across the board yearly increase to personnel.
- Standardize all volunteer commission applications including an interview selection structure
- Establish a Township Succession Plan for management level positions which must include cross training

4. VISION/MISSION/VALUES STATEMENT

- Create a mission and/or vision and values statement for East Brandywine Township

5. EAST BRANDYWINE POLICE DEPARTMENT

- Recommend East Brandywine Police Department staffing study by either International Chiefs Association or PA State Police Format
- 5 Year Police Department budget and staffing (cf pages 20 to 29)

6. TRAFFIC

- As the most recent traffic study was over 10 years ago, we recommend using Act 209 to fully fund PennDOT study.
- Use Act 209 Funds to evaluate future traffic light timing adaptation for present and future intersection improvement

7. PENSION

- East Brandywine Township Pension Plans should be, *“placed out for review and consideration including but not limited to one investment advisor.”*
 - Establish pension committee to include one supervisor, Township Manager, Director of Finance, Police Chief and three Township residents

8. BOARD/MANAGEMENT RELATIONSHIP

- Every Friday, Township Manager send or update Board Members on weekly issues, (verbal or written)
- All elected officials attend educational training sessions, i.e. PSATS, Chester County Programs, D.E.P. Sessions, etc.

9. GUTHRIESVILLE VILLAGE

- Decide the future of Guthriesville Village, evaluate present ordinances that effect any possibility of success.

10. PUBLIC WORKS

- Public Works Department needs to establish
 - Five year paving plan, street list of 2.25 miles recommended per year
 - Provide street list to utility companies and engineering
 - Advertise bid before April 30th
 - Five year capital equipment list for all equipment with a cost of \$5,000.00 value or greater

11. CEDARVILLE'S RELATIONSHIP WITH EAST BRANDYWINE

- Ascertain total yearly engineering costs (as stormwater, commercial, residential and electrical review are all outsourced). Evaluate the feasibility for full time employment.

- Most immediate concern: \$400,000.00 to \$800,000.00 application for 2018 MS4 Permit.

12. RESERVE FUNDS

- Act 209 Road Fund, Open Space Fund and Parks Reserve Fund must be open for review and transparent within budget to prevent potential challenges. Accounts should be reviewed once per year.

13. BONDSVILLE MILL

- All funding spent now and in the future for Bondsville Mill Project should be funded by East Brandywine Township Open Space Reserve Fund, NOT General Fund.

14. TAX COLLECTOR

- Re-evaluate Tax Collector pay rate, per scope of duties presently performed. As reported in this review, performance duties have been exceeded here at East Brandywine.

15. ACTIVE RECREATION

- East Brandywine Youth Association provides active recreation for baseball, softball, soccer and lacrosse. Review present field requirement for additional soccer and lacrosse programs, as these are actively growing within East Brandywine ... make public these discussions.

16. TOWNSHIP BUDGETING PROCESS

- Establish Township Budget Committee of one Township Supervisor, Township Manager, Director of Finance, Police Chief and Department heads.
 - Begin meeting together July 15th.
 - Also include “*budget message to the public*” within the final budget.
 - Present budget to full Board by October 1st.