

# CITY OF BELLE ISLE, FL CITY COUNCIL MEETING

Held in City Hall Chambers 1600 Nela Avenue Belle Isle FL Held the 1st and 3rd Tuesday of Every Month Tuesday, June 20, 2023 \* 6:30 PM

#### **AGENDA**

#### **City Council Commissioners**

Nicholas Fouraker, Mayor Vice-Mayor – Beth Lowell, District 5

District 1 Commissioner – Ed Gold | District 2 Commissioner – Anthony Carugno | District 3 Commissioner – Karl Shuck | District 4 Commissioner – Randy Holihan | District 6 Commissioner – Stan Smith | District 7 Commissioner – Jim Partin

- 1. Call to Order and Confirmation of Quorum
- 2. Invocation and Pledge to Flag Vice Mayor Beth Lowell, District 5
- 3. Consent Items These items are considered routine and previously discussed by the Council. One motion will adopt them unless a Council member requests before the vote on the motion to have an item removed from the consent agenda and considered separately.
  - a. Approval of the City Council meeting minutes June 6, 2023
- 4. Citizen's Comments Persons desiring to address the Council must complete and provide the City Clerk a yellow "Request to Speak" form. When the Mayor recognizes you, state your name and address and direct all remarks to the Council as a body, not individual council members, staff, or audience. Citizen comments and each section of the agenda where public comment is allowed are limited to three (3) minutes. Questions will be referred to staff and answered within a reasonable period following the meeting date.
- 5. Unfinished Business
  - a. <u>SECOND READING AND ADOPTION</u>: ORDINANCE NO. 23-03 AN ORDINANCE OF THE CITY OF BELLE ISLE, FLORIDA, AMENDING CHAPTER 2, ARTICLE III, DIVISION 1 OF THE CITY'S CODE OF ORDINANCES TO CREATE A NEW SECTION 2-82 CONCERNING THE HIRING AND CONFIRMATION OF AN ASSISTANT CITY MANAGER, PROVIDING FOR SEVERABILITY, CONFLICTS, CODIFICATION, AND AN EFFECTIVE DATE.
- 6. New Business
  - a. Discussion and Selection of City Manager Finalists: Poll Summary Spreadsheet
  - b. Dale Martin
  - <u>c.</u> David Molgaard
  - d. David Strohl
  - e. Mark Rooney
  - Michael Giardino
  - g. Rick Rudometkin
  - h. Stacey Kifolo
  - i. Approval of the Candidate Meet and Greet July 13 and July 14
- 7. Other Business
- 8. Adjournment

<sup>&</sup>quot;If a person decides to appeal any decision made by the Council with respect to any matter considered at such meeting or hearing, he/she will need a record of the proceedings, and that, for such purpose, he/she may need to ensure that a verbatim record of the proceedings is made, which record includes the testimony and evidence upon which the appeal is to be based."(F. S. 286.0105). "Persons with disabilities needing assistance to participate in any of these proceedings should contact the City Clerk's Office (407-851-7730) at least 48 hours in advance of the meeting." —Page 1 of 1



## CITY OF BELLE ISLE, FL CITY COUNCIL MEETING

Tuesday, June 6, 2023, \* 6:30 pm

#### **MINUTES**

Present was:

Absent was:

District 3 Commissioner - Karl Shuck

Nicholas Fouraker, Mayor

District 1 Commissioner - Ed Gold

District 2 Commissioner – Anthony Carugno

District 4 Commissioner - Randy Holihan-Zoom

District 5 Commissioner - Beth Lowell

District 6 Commissioner - Stan Smith

District 7 Commissioner - Jim Partin

#### 1. Call to Order and Confirmation of Ouorum

Mayor Fouraker called the meeting to order at 6:30 pm, and the City Clerk confirmed the quorum. Also present were Attorney Chumley, Interim City Manager Grimm, Acting Chief Millis, Public Works Director Phil Price, and City Clerk Yolanda Quiceno.

#### 2. Invocation and Pledge to Flag

Comm Gold gave the invocation and led the pledge to the flag.

Mayor Fouraker announced that Comm Partin would attend the meeting via Zoom, and Comm Shuck may not be in attendance.

#### 3. Belle Isle Introduction and Swear-In of Officer Zachary Mathews.

Mayor Fouraker swore in Officer Zachary Mathews.

#### 4. Consent Items

a. Approval of the City Council Meeting Minutes - May 2, 2023

Comm Carugno requested a correction to the minutes as follows,

Page 5 reads, "6. New Business a. Appointment of Vice Mayor – Sec. 4.03. Vice-mayor: Election. Comm Carugno moved to nominate Comm Beth Lowell. Comm Smith seconded the motion, which passed unanimously 6:0.

Should read, "6. New Business a. Appointment of Vice Mayor – Sec. 4.03. Vice-mayor: Election. Comm Carugno moved to nominate Comm Beth Lowell. Comm Smith Gold seconded the motion, which passed unanimously 6:0.

Comm Holihan moved to approve the consent item as amended.

Comm Lowell seconded the motion, which passed unanimously 6:0. Comm Shuck was not in attendance.

#### 5. Citizen's Comments

Mayor Fouraker called for citizen comments. There being none, he closed the citizen comment section.

#### 6. Unfinished Business

a. Approval of Reallocation of ARPA Funding
 Interim City Manager Grimm presented a list of reallocations of ARPA Funds discussed at a previous
 Council meeting. He noted that the list was presented to the Budget Committee, who recommended
 approval.

<sup>&</sup>quot;If a person decides to appeal any decision made by the Council with respect to any matter considered at such meeting or hearing, he/she will need a record of the proceedings, and that, for such purpose, he/she may need to ensure that a verbatim record of the proceedings is made, which record includes the testimony and evidence upon which the appeal is to be based." (F. S. 286.0105). "Persons with disabilities needing assistance to participate in any of these proceedings should contact the City Clerk's Office (407-851-7730) at least 48 hours in advance of the meeting." —Page 1 of 5

Comm Smith moved to approve the reallocation of ARPA funds as presented.

Comm Holihan seconded the motion, which passed unanimously 6:0. Comm Shuck was not in attendance.

At the request of the attending residents, Mayor Fouraker called for a motion to reopen Citizen Comments.

Comm Gold moved to reopen citizen comments.

Comm Holihan seconded the motion, which passed unanimously 6:0.

Mayor Fouraker reopened for citizen comments.

Jodi McMurtrie Zgura residing at 1528 Hoffner Avenue, asked for clarification on the location of the
proposed PD Boat Dock. Interim City Manager Grimm said he has spoken to many of the residents in the
surrounding area. He noted that the staff has sent out an RFP, and once the information is received, it
will be shared with the community. The motion tonight was to approve the funding for a project.
Currently, the Peninsular Drive location is the most viable option. Mr. Grimm stated that they are also
open to other options if presented.

Mayor Fouraker gave a brief on the current challenges of retrieving and storing the marine patrol equipment. At the present time, the dock currently offered by a resident is appreciated however, it is not ideal. He noted that the funding provided by the State could assist with delivering the adequate services needed for the police department and for the safety of the residents.

Acting Chief Millis said that the proposed dock is in its infant stage. The intent is to position the dock so that it does not utilize the entire beach area to allow residents to enjoy the park.

- Diane Madara residing at 5729 Peninsular Drive, asked if the dock would be open to the public or just for law enforcement. CM Grimm said it would be for law enforcement and city staff only.
- Comm Carugno said he was surprised by the proposed dock on Venetian Beach. He stated that the
  discussion today is for funding only. He has other options that he would like to present at a later meeting.

There being no further comment, Mayor Fouraker closed citizen comments and excused himself from the meeting to attend a scheduled event. Vice Mayor Lowell will be the presiding officer.

Vice Mayor Lowell called for a motion to excuse Comm Shuck from tonight's meeting.

Comm Smith moved to excuse Comm Shuck from tonight's meeting.

Comm Holihan seconded the motion, which passed unanimously 6:0.

b. APPROVAL OF RESOLUTION 23-02 - A RESOLUTION OF THE CITY OF BELLE ISLE, FLORIDA, AMENDING AND RESTATING Resolution 19-18 AS AMENDED AND RESTATED BY RESOLUTION 21-18 CONCERNING THE DUTIES AND PROCEDURES OF THE CITY BUDGET ADVISORY COMMITTEE.

Interim City Manager Grimm read Resolution 23-02 by Title and stated that the addition was item G. There being no discussion, Comm Holihan made a motion to approve Resolution 23-02. Comm Smith seconded the motion, which passed unanimously 6:0.

c. ORDINANCE NO. 23-03 - First Reading and Consideration - AN ORDINANCE OF THE CITY OF BELLE ISLE, FLORIDA, AMENDING CHAPTER 2, ARTICLE III, DIVISION 1 OF THE CITY'S CODE OF ORDINANCES TO CREATE A NEW SECTION 2-82 CONCERNING THE HIRING AND CONFIRMATION OF AN ASSISTANT CITY MANAGER, PROVIDING FOR SEVERABILITY, CONFLICTS, CODIFICATION, AND AN EFFECTIVE DATE.

Interim City Manager Grimm read Ordinance 23-03 by Title for First Reading.

There being no discussion, Comm Holihan made a motion to approve Ordinance 23-03.

Comm Gold seconded the motion, which passed unanimously 6:0.

<sup>&</sup>quot;If a person decides to appeal any decision made by the Council with respect to any matter considered at such meeting or hearing, he/she will need a record of the proceedings, and that, for such purpose, he/she may need to ensure that a verbatim record of the proceedings is made, which record includes the testimony and evidence upon which the appeal is to be based." (F. S. 286.0105). "Persons with disabilities needing assistance to participate in any of these proceedings should contact the City Clerk's Office (407-851-7730) at least 48 hours in advance of the meeting." —Page 2 of 5

#### 7. New Business

a. Approval of Special Called Session June 15 & June 16 Interim City Manager Grimm gave an update on the City Manager search and noted that the recruiting period has closed. In addition, Council received an email today from Colin Baenziger requesting a discussion on polling the seven candidates for interviews on June 15<sup>th</sup> and 16<sup>th</sup>. Interim City Manager Grimm said he spoke with most of the Council members and provided an additional option to allow Council more time to evaluate the candidates.

Council requested that Colin Baenziger narrow the list to five candidates to allow for keeping the original dates for the interview. Comm Gold said it would be unfair, and he is uncomfortable delegating that charge to Colin Baenziger. Attorney Chumley noted that might be a potential Sunshine issue in the request, which is why Colin Baenziger is asking Council to narrow down the list. All decisions should be made in an open meeting.

Ms. Klein said if Council would like to move to the proposed Option 2, they can work around the schedule to allow more time to review the candidate resumes. Mr. Grimm suggested the following Option 2, and after discussion, the Council agreed to forego the initial dates and agreed to the following,

#### June 20, 2023 - 6:30 pm

Selection of 5-Candidates and Ordinance 23-03 ONLY on the agenda for discussion and approval.

#### July 13th & 14th, 2023

9:00 am Tour of City. Candidates, Mayor, and Council
11 am to 12:30 pm Meet with key City staff Lunch
1 pm - 5 pm One-on-one City Council interviews
6:00 pm - 7:30 pm Reception for Commissioners, finalists, and the public

#### July 18th, 2023

6:30 pm Commission selects its next City Manager or schedules additional interviews.

Comm Holihan moved in favor of the proposed Option 2. Comm Smith seconded the motion, which passed unanimously 6:0.

b. RESOLUTION NO. 23-03 - A RESOLUTION OF THE CITY OF BELLE ISLE, FLORIDA, AMENDING THE BUDGET FOR THE FISCAL YEAR BEGINNING OCTOBER 1, 2022, AND ENDING SEPTEMBER 30, 2023, PROVIDING AN EFFECTIVE DATE.

Interim City Manager Grimm read Resolution 23-03 by Title. The amendment was presented to the Budget Committee and recommended approval.

Comm Holihan made a motion to approve Resolution 23-03.

Comm Smith seconded the motion, which passed unanimously 6:0.

c. RESOLUTION NO. 23-04 - A RESOLUTION OF THE CITY OF BELLE ISLE, FLORIDA, APPROVING A RATE ADJUSTMENT CHANGE FOR JJ'S WASTE AND RECYCLING BEGINNING OCTOBER 1, 2023, AND ENDING SEPTEMBER 30, 2024, PROVIDING AN EFFECTIVE DATE.

Interim City Manager Grimm read Resolution 23-04 by Title.

Comm Smith made a motion to approve Resolution 23-04.

Comm Holihan seconded the motion, which passed 4:2 with Comm Partin and Comm Carugno, nay.

d. RESOLUTION NO. 23-05 - A RESOLUTION OF THE CITY OF BELLE ISLE, FLORIDA, AUTHORIZING AN INCREASE IN THE ANNUAL NON-AD VALOREM SOLID WASTE COLLECTION ASSESSMENT; AND PROVIDING AN EFFECTIVE DATE.

Interim City Manager Grimm read Resolution 23-05 by Title.

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Comm Gold made a motion to approve Resolution 23-05.

Comm Smith seconded the motion, which passed 5:1 with Comm Carugno, nay.

e. RESOLUTION NO. 23-06 - A RESOLUTION OF THE CITY OF BELLE ISLE, FLORIDA, AUTHORIZING AN INCREASE IN THE ANNUAL NON-AD VALOREM STORMWATER ASSESSMENT; AND PROVIDING AN EFFECTIVE DATE.

Interim City Manager Grimm read Resolution 23-06 by Title.

Comm Holihan made a motion to approve Resolution 23-04.

Comm Smith seconded the motion, which passed 5:1 with Comm Carugno, nay.

f. Urban County Qualification Process FY2024-2026

Orange County invited the City to participate in an Interlocal Agreement to conduct development activities under the Urban County process. Mr. Grimm stated that the Council opted out in 2020. The Council discussed the agreement and agreed that the residents would not benefit from this agreement at this time.

Comm Holihan motioned to opt out of the agreement for 2024-2026.

Comm Smith seconded the motion, which passed unanimously 6:0.

#### 8. Attorney Report

Attorney Chumley said Attorney Langley has a standing conflict and cannot attend the meeting on the first Tuesday of the month. He asked if Council would be agreeable to changing the Workshop to the first Tuesday of the month and the Council meeting to the third Tuesday so that he may be in attendance. Interim CM said he could provide further information under his report.

#### 9. City Manager Report

- a. City Manager search update previously discussed.
- b. <u>Discussion and approval to cancel or reschedule July 4, 2023, meeting.</u>

Comm Carugno moved to cancel the July 4th meeting.

Comm Gold seconded the motion, which passed unanimously 6:0.

#### c. Budget Calendar FY 2023/2024

Interim City Manager Grimm provided the FY 2023-2024 Budget calendar and asked that until the budget is approved, he would like to have all meetings regularly scheduled meetings. At the end of the budget season, Council can decide to go back to workshops on the first Tuesday of the month. He added that the calendar was also provided to the Budget Committee.

Comm Gold moved to have all meetings regularly scheduled until the end of the budget season.

Comm Smith seconded the motion, which passed unanimously 6:0.

#### d. Chief's Report

Acting Chief Millis gave an update on citations for the month. Council complimented Code Enforcement on their efforts throughout the City. Acting Chief Millis said if someone calls in on a violation, they must give their name for the record. Attorney Chumley said it is a State Statute requirement.

e. Public Works Director

Phil Price gave an update on open projects, Cullen Lake Drive, Gilbert Park, and sidewalk repair.

#### 10. Mayors Report

Vice Mayor Lowell announced a 3-part County meeting of 20/50 Programs regarding mixed-use zoning changes. She noted that she would send a copy to the clerk to distribute. Interim CM Grimm said he would attend the initial meeting and bring forward a report. The following sessions will be held on June 27 and July 10.

<sup>&</sup>quot;If a person decides to appeal any decision made by the Council with respect to any matter considered at such meeting or hearing, he/she will need a record of the proceedings, and that, for such purpose, he/she may need to ensure that a verbatim record of the proceedings is made, which record includes the testimony and evidence upon which the appeal is to be based." (F. S. 286.0105). "Persons with disabilities needing assistance to participate in any of these proceedings should contact the City Clerk's Office (407-851-7730) at least 48 hours in advance of the meeting." —Page 4 of 5

Interim CM Grimm reported that the City of Edgewood contacted him to participate in a presentation regarding the Pine Castle historical district to try to lessen the restrictions for annexation. He asked if the Council would like him to attend. The Council consensus was to have the CM attend and report back to Council.

#### 11. Council Items

Comm Holihan announced that he is resigning effective December 31 and has offered a replacement for Council consideration, Jason Carson. Council briefly discussed the required FORM 6 submittals starting January 2024. Comm Carugno asked if the City would be open to paying any fines imposed if the form is not submitted. Attorney Chumley said he is not aware of any way around it. It is a requirement, and Statute passed by the State.

Comm Gold shared that he may not continue his seat on the Council past January 1, 2024, due to the new State Statute.

Comm Carugno announced that the next ANAC meeting would be held on July 14.

#### 12. Adjournment

With no further business, Vice Mayor Lowell called for a motion to adjourn. The motion passed unanimously at 8:00 pm.

ORDINANCE NO. 23-03 1 2 AN ORDINANCE OF THE CITY OF BELLE ISLE, FLORIDA, AMENDING CHAPTER 2, ARTICLE III, DIVISION 1 OF THE CITY'S CODE OF ORDINANCES TO CREATE A NEW 3 SECTION 2-82 CONCERNING THE HIRING AND CONFIRMATION OF AN ASSISTANT CITY 4 5 MANAGER, PROVIDING FOR SEVERABILITY, CONFLICTS, CODIFICATION, AND AN EFFECTIVE DATE. 6 7 WHEREAS, in the event the City creates an assistant city manager position, 8 9 the City Council would like the opportunity to confirm and potentially interview 10 the person that the city manager hires for such position; and WHEREAS, the City Council determines that the code provisions adopted by 11 this Ordinance are in the City's best interests. 12 13 NOW, THEREFORE, be it ordained by the City Council of the City of Belle Isle, Florida, as follows: 14 15 SECTION 1. Recitals. The foregoing recitals are hereby ratified and confirmed as 16 17 being true and correct and are hereby made a part of this Ordinance. 18 19 SECTION 2. City Code Amendment. Chapter 2, Article III, Division 1 of the Belle Isle Code of Ordinances is hereby amended to add a new Section 2-82 to read as 20 21 follows (words that are stricken out are deletions; words that are underlined are 22 additions): 23 ARTICLE III. - OFFICERS AND EMPLOYEES

DIVISION 1. - GENERALLY

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Secs. 2-82. Assistant City Manager.
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    If the position of assistant city manager is created, then the city manager's
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    hiring of a person to serve as assistant city manager is subject to confirmation
    by the city council. The city council may interview the person hired or proposed
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    to be hired as the assistant city manager before confirming such person. If the
    city manager hires an assistant city manager and the city council does not confirm
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    such a person within thirty (30) days of the effective date of hire, the person
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    will be automatically terminated from the assistant city manager position.
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    SECTION 3. Codification. Section 2 of this Ordinance will be incorporated into
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    the Belle Isle City Code. Any section, paragraph number, letter, and/or any
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    heading may be changed or modified as necessary to effectuate the foregoing.
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    Grammatical, typographical, and similar errors or like errors may be corrected,
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    and additions, alterations, and omissions not affecting the construction or
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    meaning of this ordinance or the City Code may be freely made.
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    SECTION 4. Severability. If any section, subsection, sentence, clause, phrase,
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    word, or provision of this Ordinance is for any reason held invalid or
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    unconstitutional by any court of competent jurisdiction, whether for
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    substantive, procedural, or any other reason, such portion will be deemed a
    separate, distinct, and independent provision, and such holding will not affect
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22
    the validity of the remaining portions of this Ordinance.
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ORD 23-03 - 2 OF 3

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SECTION 5. Conflicts. If a conflict arises between this Ordinance and any other
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    ordinance or provision of law, this Ordinance controls to the extent of such
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    conflict, as permitted under the law.
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    SECTION 6. Effective date. This Ordinance will become effective immediately
    upon adoption by the City Council of the City of Belle Isle, Florida.
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    FIRST READING: , 2023
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    SECOND READING: , 2023
    ADOPTED this ____ day of _____ 2023 by the City Council of the City of Belle
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    Isle, Florida.
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                                                   CITY OF BELLE ISLE
   ATTEST:
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    Yolanda Quiceno, CMC-City Clerk
                                                   Nicholas Fouraker, Mayor
15
    STATE OF FLORIDA
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17
    COUNTY OF ORANGE
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    I, Yolanda Quiceno, City Clerk of the City of Belle Isle, do hereby certify that
    the above and foregoing document ORDINANCE 23-03 was duly and legally passed by
19
    the Belle Isle City Council, in session assembled on the ____ day of ____ 2023,
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    at which session a quorum of its members was present.
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23
    Yolanda Quiceno, CMC-City Clerk
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## CITY OF BELLE ISLE, FLORIDA CITY COUNCIL AGENDA ITEM COVER SHEET

Meeting Date: June 20, 2023

To: Honorable Mayor and City Council Members

From: T. Grimm, Interim City Manager

Subject: Colin Baenziger and Lynelle Klein, Recommended Candidates

Interviews and Community Reception

#### Background:

Colin Baenziger recommends considering seven candidates (of the approximately 24 who applied) to be our next City Manager. They believe all the candidates are very strong and would do an excellent job for Belle Isle. Brief summaries of their credentials follow. They are all looking forward to being working supervisors with regular, first-hand contact with the public.

#### The Recommended Candidates

- Michael Giardino: Mr. Giardino is presently an Airport Executive Management Consultant for the City of Brownsville, TX (population 190,006). Before that, he was an Airport Chief Executive Officer for Newport News, VA (population 186,729) for six years, an Airport Chief Executive Officer for Rochester, NY (population 206,602) for five years, and Village Manager/Treasurer for the Village of Brockport, NY (population 8,385) for one year. His management style is collaborative, delegation, and decisive. It is deeply rooted in the best decision-making tools and information available. His greatest strength is matching the appropriate resources to a task. While he considers rescuing 110 people in the aftermath of Hurricane Floyd in 1999 his greatest personal achievement, his greatest professional accomplishment pertaining to his ability to manage and lead in a municipal government role came at the Greater Rochester International Airport (ROC). While there, they won a statewide competition that awarded the airport \$39.8M toward an aggressive two-year \$79M capital improvement project to create a 21<sup>st</sup> Century Airport. The project incorporated "smart" technologies and numerous access improvements - especially for persons with disabilities. ROC was the program's first awardee, and its grant submission became the hallmark for other airports to emulate. The award allowed completion of a 7-year plan in two years while adding an outdoor road canopy delivering customer and community-tailored results - incurring no additional airport debt. The project won 13 awards for innovation, including his Community Person of the Year award from the Hearing Loss Association of America (HLAA). Mr. Giardino has a bachelor's degree in earth science from the State University of New York College at Brockport and a master's in national security and strategic studies from the U.S. Naval War College.
- Stacey Kifolo: Most recently, Ms. Kifolo was the Deputy City Manager for the City of Deltona, FL (population 97,095) for one year. Previously, she was the Township Manager for East Buffalo Township, PA (population 6,949) for nine years and the Fiscal / Project Manager for Central PA Workforce Development Corporation for four years. She is an adaptive leader who realizes different situations and people thrive under different management styles. She believes that we are both teachers and students, and it is important to recognize the need to be both. She is proud of her efforts to reduce a \$3.3M unfunded post-retirement healthcare cost liability at East Buffalo Township and put it in a solid financial position without increasing taxes or foregoing necessary projects. When the

effort began in 2013, the Township was paying for the benefits from the general fund. After having an actuarial analysis done and determining the extent of the liability, she then began to act. First, she was able to identify a less costly healthcare program. She also began setting aside funds to be invested. By 2020, the unfunded liability was down to \$2 million, and the investment account balance exceeded \$1.6M. Ms. Kifolo has a bachelor's degree in business administration from Bloomsburg University of Pennsylvania and a master's degree from Louisiana State University.

- Dale Martin: Mr. Martin was most recently the City Manager for Fernandina Beach, FL (population 13,199) for eight years. Previously he was the Town Manager for Winchester, CT (population 10,883) for four years, the City Manager for Davison, MI (population 5,150) for two years, the City Manager for Dowagiac, MI (population 5,700) for a short period, and the City Manager for Linden, MI (population 3,459) for nine years. His management style is best described as quiet oversight. He relies on the expertise of educated, trained, and experienced employees for their specific roles and responsibilities. He meets regularly with senior directors individually but listens more than talks during the meetings. The most significant success of Mr. Martin's career was the culmination of his five-year battle with the Federal Emergency Management Agency (FEMA) to obtain reimbursement funding for Fernandina Beach following Hurricane Matthew (2016). Many residents savaged him for his "mismanagement" of the FEMA process, but he was supremely confident that the City's effort would eventually prevail, and it did. Whereas FEMA's first "final" offer was \$650,000, the city eventually recovered over \$7,000,000. Mr. Martin has a bachelor's degree in political science from Alma College and a master's degree in public administration from Oakland University.
- David Molgaard: Mr. Molgaard most recently was the Chief of Staff and Firm Administrator for Bailey & Glasser, LLP for four years. Before that, he was the City Manager for Charleston, WV (population 47,929) for sixteen years, a City Councilmember in Charleston for four years, and worked as an attorney for fifteen years. As a manager and organizational leader, he looks to: develop and improve core competencies within the organization; deploy and leverage appropriate technologies; strategically align duties and responsibilities; identify, develop, and retain leaders; reform work environments and provide incentives to facilitate mission; and collaborate with others, both inside and outside of the organization. When Mr. Molgaard first stepped into the role of city manager in Charleston, he found an organization that was very siloed with sharp delineations that were inefficient and worked against inter-departmental collaboration. During his tenure, the culture drastically changed. Those changes started at the department head level, and the city took great strides in cascading managerial initiative and accountability down to the middle managers and frontline supervisors. Mr. Molgaard has a bachelor's degree in English from West Virginia University, a master's degree in industrial labor relations, and a juris doctorate degree.
- Mark Rooney: Mr. Rooney recently served as the Village Administrator for Round Lake Beach, IL (population 27,081) from 2021 to May 2023. Previously, he was the Town Manager for Westerly, RI (population 22,651) for three years, the Village Manager for Carpentersville, IL (population 38,291) for eight years, and the Chief of Staff for North Chicago, IL (population 32,587) for one year. He also worked for the Village of Wheeling, IL (population 35,912) for six years, with the last three as Village Manager. Mr. Rooney believes his responsibility is to create and foster an organizational culture and environment where trust is valued. Leadership starts at the top, so he must be a role model for integrity and honesty in all professional interactions and encounters. Carpentersville's greatest challenges in 2010 were a \$1M structural deficit, failing infrastructure (roads and water/wastewater facilities), and the need to address economic development. He created the slogan, "Get to YES," which became the staff's over-arching vision and guidance. The result was an organization transformed from a bureaucratic mindset to one of engaged problem solvers. Employee morale skyrocketed, as did the satisfaction of citizens and stakeholders (as measured by surveys and

feedback from the community). Consequently, the Village had a competitive edge in attracting local developers, businesses interested in relocating, and businesses already in the village who needed to expand their operations. Mr. Rooney has a bachelor's degree in education from the University of Nebraska. He has done coursework in the master's degree program at Northern Illinois University but did not attain the degree. He is an ICMA Credentialed Manager.

- Rick Rudometkin: Mr. Rudometkin was most recently the Deputy City Manager for Huntsville, TX (population 79,411) for one and a half years. Before this, he was City Administrator for Snoqualmie, WA (population 13,810) for one year, the City Manager for Sammamish, WA (population 65,851) for six months, and the County Manager for Eddy County, NM (population 58,394) for six years. Mr. Rudometkin's management style is best described as a visionary servant/leader. It comes to life by creating a team spirit that connects the staff to the council's vision. People will follow and perform when there is a genuine interest in helping them to succeed and when they receive the credit they deserve. His biggest success came from being appointed the Manager of Eddy County in the middle of one of the County's worst economic crises. He enacted measures that successfully prevented the County's bankruptcy. Mr. Rudometkin has a bachelor's degree in business management from Woodbury University. He is an ICMA Credentialed Manager, Certified Public Manager, and a Certified Advocate for Public Ethics.
- David Strohl: Mr. Strohl has been the City Administrator for Palos Heights, IL (population 11,819) since 2021. Previously, he was the Village Administrator for Forsyth, IL (population 3,683) for seven years, the Business Manager for Morton, IL (population 15,353) for eleven years, and the City Administrator for West Peoria, IL (population 5,551) for six years. Mr. Strohl manages the organization, not each individual department or employee. He lays out the projects and tasks, sets parameters and deadlines, and checks in periodically. His greatest success came when he was the Chair of the Downtown Development Action Team of the Morton Economic Development Council. He led the effort to create a Business District to facilitate and provide funding for community and economic development and redevelopment activities within the Business District. A 0.25% sales tax was imposed on businesses within the Business District to fund community development and redevelopment activities. The resulting funding will improve commerce within the Village for years to come. Mr. Strohl has a bachelor's degree in political science from Illinois State University and a master's degree in public administration from Valdosta State University. He is an ICMA Credentialed Manager.

#### **Next Steps**

The 5-finalists will be selected on June 20<sup>th</sup> and invited to Belle Isle for a tour, public reception, and formal interviews on July 13<sup>th</sup> and June 14<sup>th</sup>, with a possible decision then or shortly thereafter.

Staff Recommendation: Discuss the top 5 candidates and complete the Poll Sheet.

Suggested Motion: I move to approve the top 5 candidates for consideration as City Manager.

**Alternatives**: Disapprove and conduct a search for additional candidates.

Fiscal Impact: Unknown

Attachments: N/A

# Belle Isle, FL Summary of Preferences for City Manager Finalists, Round # \_\_\_\_

June 06, 2023

| Council Member<br>Candidate | Carugno | Fouraker | Gold | Holihan | Lowell | Shuck | Smith | Partin | Total |
|-----------------------------|---------|----------|------|---------|--------|-------|-------|--------|-------|
| Giardino                    |         |          |      |         |        |       |       |        | 0     |
| Kifolo                      |         |          |      |         |        |       |       |        | 0     |
| Martin                      |         |          |      |         |        |       |       |        | 0     |
| Molgaard                    |         |          |      |         |        |       |       |        | 0     |
| Rooney                      |         |          |      |         |        |       |       |        | 0     |
| Rudometkin                  |         |          |      |         |        |       |       |        | 0     |
|                             |         |          |      |         |        |       |       |        |       |
| Strohl Total                | 0       | 0        | 0    | 0       | 0      | 0     | 0     | 0      | 0     |

| Compiled by: |  |
|--------------|--|
|              |  |



Dale L. Martin

# Belle Isle City Manager Candidate Report

#### b.

### **TABLE OF CONTENTS**

|                         | <u>PAGE</u> |
|-------------------------|-------------|
| COVER LETTER AND RESUME | 1           |
| CANDIDATE INTRODUCTION  | 5           |
| BACKGROUND CHECKS       | 11          |
| CB&A REFERENCE NOTES    | 17          |
| INTERNET SEARCH         | 35          |

b.

## Cover Letter and Resume

b.

### **Section 6**

#### DALE L. MARTIN

2404 Los Robles Fernandina Beach, FL 32034 (904) 557-5047 dallmartin@yahoo.com

April 24, 2023

Mr. Colin Baenziger Colin Baenziger & Associates [VIA EMAIL: Recruit24@cb-asso.com]

Mr. Baenziger:

I wish to formally express my interest in the Belle Isle City Manager position. As requested, please find my current resume included with this letter.

I served as the City Manager of Fernandina Beach, Florida for over seven years (recently recognized by the International City/County Management Association for twenty-five years of career service). It was an exceptionally successful tenure with the integration of new senior staff and efforts to initiate projects that have faltered for many years; nonetheless, the political climate markedly shifted during the City's December election, and I did not have the support of the newly-elected City Commission.

My experience in Fernandina Beach has been highlighted by my emergency management efforts (several tropical storms, interactions with the Federal Emergency Management Agency and the Florida Department of Emergency Management), waterfront resiliency projects (United States Army Corps of Engineers, Florida Department of Environmental Quality), capital infrastructure planning (facilities and streets), and extensive community engagement efforts.

In general, my twenty-five years of local government experience has demonstrated my ability to collaborate with City Councils/Commissions; manage and develop senior and junior staffs; and effectively engage community residents. I would look forward to serving the City of Belle Isle.

Thank you for the opportunity to be considered. If you have any questions, please contact me.

Sincerely,

Dale L. Martin

2404 Los Robles Fernandina Beach, FL 32034 (904) 557-5047 dallmartin@yahoo.com

City Manager, Fernandina Beach, Florida (December, 2015- March, 2023) population 13,500; Atlantic Ocean barrier island community (Amelia Island) approximately twenty-five miles northeast of Jacksonville; balanced permanent resident and coastal resort community rich in history with several registered historic landmarks and strong environmental advocacy; city services include municipal water, wastewater, and stormwater utilities; police and fire protection; marina; airport; golf course; streets (approximately seventy miles of improved roads); numerous parks, including nearly ten miles of Atlantic Ocean beaches; fourteen direct subordinates among 230 full-time, 150 part-time/seasonal employees; City Taxable Value, \$3,500,000,000; annual budget approximately \$196,000,000 (General Fund approximately \$26,000,000).

- Managed community recovery efforts following Hurricanes Matthew and Irma (both impacted community as tropical storms), including a successful arbitration effort against the Federal Emergency Management Agency (FEMA) to restore over \$6,000,000 of obligated funding (FEMA original obligation was \$650,000).
- Prepared and championed the 2019 budget, unanimously adopted by City Commission, which included an additional 0.50 mill levy above the proposed operating levy for acquisition of environmentally sensitive and conservation land (generated \$1.2 million).
- Resuscitated 2005 collaborative effort between City, Florida Department of Transportation, and First Coast Railroad to re-open a critical downtown rail crossing (closed for nearly forty years; construction funded in 2022 budget).
- Led effort to design waterfront resiliency and park project (conceived for nearly thirty years; construction of first phase complete in April, 2022).
- Negotiated three collective bargaining contractors over four months (police, fire, and general laborers), as well as the de-certification/re-certification of one of those units.
- Reviewed and revised staff salaries/wages considering current economic conditions and labor market (unanimously adopted by City Commission).
- Assessed community infrastructure following decades of neglect (roads, City Hall, recreation centers, public safety), including 2019 pavement management analysis, 2020 City Hall assessment, and scheduled 2023 construction of new fire station.
- Served as Vice Chairman, Florida Resiliency and Energy District (FRED) Executive Board and Secretary/Treasurer, Northeast Florida League of Cities (NEFLC) Executive Board.
- Authored weekly article for area print and online media.

**Town Manager, Winchester, Connecticut (April, 2011- November, 2015)** population 11,000; diverse and distressed community in northwest Connecticut, with urban, rural, and natural regions; services included town-owned and operated water and sanitary sewer treatment facilities and distribution systems; police and (volunteer) fire protection; public works (approximately eighty miles of roads); parks; senior citizen center; and general government; sixty full-time employees; annual budget, approximately \$33,000,000.

 Assisted with discovery, investigation, and prosecution of former Finance Director's embezzlement of approximately \$2.5 million.

b.

Dale L. Martin

- Performed additional duties as Town Planner and Town Economic Development Director.
- Prepared and awarded state grants of \$600,000 for brownfield and economic development assistance; other grant applications have included Main Street Investment Fund, Smart Growth America, Connecticut Main Street Preservation of Place, and Vibrant Community Initiative.
- Negotiated five labor contracts (Police, Public Works, Supervisors, Assistants, Dispatch)
- Appointed to State's MORE (Municipal Opportunities & Regional Efficiencies) Commission; served on Board of Directors for Northwest Connecticut Chamber of Commerce and the Northwest Connecticut Economic Development Corporation.

City Manager, Davison, Michigan (population 5,500; April, 2008- August, 2010)
City Manager, Dowagiac, Michigan (population 6,500; March, 2007- September 2007)
City Manager, Linden, Michigan (population 3,500; November, 1998- March, 2007)
Village Manager, Lexington, Michigan (population 800; April, 1996- October, 1998)

#### United States Military Service:

- First Lieutenant, 1st Brigade, 3rd Infantry Division, United States Army, Schweinfurt, Bavaria, Federal Republic of Germany (1992-1994) served as Brigade intelligence officer (S2); principal responsibilities included intelligence support for senior commanders (specifically related to ethnic conflict in and dissolution of former Socialist Federal Republic of Yugoslavia).
  - Responsible for international treaty compliance; document security; garrison security; computer security.
  - Prepared for and supervised two "no-notice" international arms control inspections (Russian, Ukrainian).
- Second Lieutenant, C Company, 2/15 Infantry, United States Army, Ft. Benning, Georgia, and Schweinfurt, Bavaria, Federal Republic of Germany (1990-1992) served as M2 Bradley mechanized infantry platoon leader.
  - Awarded Expert Infantryman Badge, Army Commendation Medal; Army Achievement Medal (with oak leaf cluster), National Defense Service Medal, Overseas Service Ribbon, and Parachutist Badge.

#### Honors and Service:

- Full Member, International City/County Managers' Association (Twenty-Five Year Service Award) and Florida City/County Managers Association
- Professional Emergency Manager (Michigan State Police)
- Volunteer, Nassau County Council on Aging
- Michigan Political Leadership Program fellow (Michigan State University)
- American Legion Post #54, including National Leadership College (membership: twentyfour years; former Post Commander [Linden, Michigan])

Education: Master of Public Administration, Oakland University (Rochester, MI), 1990; Bachelor of Arts (Political Science), Alma College (Alma, MI), 1985.

Personal interests: Boardgames, singing, golf, reading.

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## Candidate Introduction

#### **DALE L. MARTIN**

#### **EDUCATION**

Master of Public Administration, Oakland University (Rochester, MI; 1990) Bachelor of Arts, Alma College (Alma, MI; 1985) Professional Emergency Manager (Michigan State Police; 2005)

#### **EXPERIENCE**

| City Manager; Fernandina Beach, FL                 | Nov 2015 – Mar 2023 |
|--|---------------------|
| Town Manager; Winchester, CT                       | Apr 2011 – Nov 2015 |
| City Manager; Davison, MI                          | Apr 2008 – Aug 2010 |
| City Manager; Dowagiac, MI                         | Mar 2007 – Sep 2007 |
| City Manager; Linden, MI                           | Nov 1998 – Mar 2007 |
| Village Manager; Lexington, MI                     | Apr 1996 – Oct 1998 |
| Private sector management (retail operations)      | Aug 1994 – Apr 1996 |
| United States Army (infantry/intelligence officer) | Sep 1990 – Jul 1994 |

#### **BACKGROUND**

Fernandina Beach (population 13,500), located on Amelia Island approximately twenty-five miles from Jacksonville, Florida, is the County Seat of Nassau County. According to the regional Tourist Development Council, nearly 1.5 million visitors came to Amelia Island spending nearly \$750,000 (2021). The City supports local tourism with many restaurants, lodging facilities, recreational amenities, and special events in its historic Main Street downtown and throughout an extensive parks system (nearly fifty percent of the City's land is zoned for recreation or conservation uses). In addition to tourism, the City is home to two major mills (WestRock and RYAM), providing sustainable employment and revenue to the community. The City owns and operates a municipal airport, golf course, and marina.

The City has approximately 230 full-time and 150 part-time/seasonal employees. The City is organized into thirteen departments, the Directors of which report directly to the City Manager. An ongoing re-organization effort will reduce the number of directly reporting subordinates through consolidation of departmental efforts.

The City's total budget is \$196,111,895. Expenditures for the 2022/2023 General Fund budget total \$26,066,932. This number does not include a \$4,000,000 transfer from the General Fund to support the Capital Improvement budget of \$6,400,000. Major capital projects in the current fiscal year include the construction of a new fire station, other facility and recreational improvements, and street resurfacing.

The three most significant challenges facing Fernandina Beach are:

- 1. Deteriorating facilities The City has classified several facilities as "Tier 1 Facilities": critical to City operations. City Hall is nearly 125 years old, and the City's two recreation centers are each 75 years old. All other facilities are at least 23 years old (and most are even older). The fire station currently under construction will be the first new municipal facility constructed since the Golf Course Clubhouse (2000). Short-term maintenance and repairs are becoming costly and, for some facilities, do not address capacity, compliance, and safety issues. The political will to develop and implement long-term solutions has not sufficiently coalesced.
- 2. Riverfront resiliency The City's historic downtown is a key economic engine for the community: residents and tourists come to the area for daily commerce, restaurants, and community events. A portion of downtown, including a prominent road, severally floods during simple high tides as well as, obviously, during storm events. The City has prepared an ambitious seawall project to protect downtown, but comprehensive funding has yet to be identified. A key privately-owned parcel remains has rebuffed the City's collaborative overtures.
- 3. Development As identified as an issue when I was appointed in 2015, the pressures of development have yet to be resolved. On one hand, some residents desire to preserve the remaining environmental character of the City (tree canopy and sensitive wetlands); others see additional development as an economic benefit (additional tax and consumer base). The stark difference in these opposing philosophies was highlighted, in part, in the most recent election.

#### GENERAL MANAGEMENT STYLE AND EXPERIENCE

I am interested in serving the Belle Isle community because I have had experience in addressing the challenges as described in other communities (most recently in Florida): annexation, deteriorating facilities, Council/community relations, and regional collaboration. I have had the opportunity to recruit, hire, and develop the next generation of staff leadership and with my lengthy experience, I look forward to guiding and training the next generation of municipal leaders. My recent tenure in Florida also increased my knowledge in emergency management (four tropical storms) and airport operations (although the Fernandina Beach Airport is significantly less intense than Orlando International Airport). As for my career, I am in the twilight years of my career: I endeavor to settle into a community for the remainder of my career, likely another ten years or so.

My management style is best described as quiet oversight. I am, by nature, a generalist, relying significantly upon the professionalism and expertise of staff educated, trained, and experienced for specific roles and responsibilities. In some ways, I consider myself as an orchestra conductorgetting the parts to work together to accomplish the common and desired good. I typically meet

regularly with senior directors individually, but insist that I do more listening during those meetings than talking.

The staffs that I have led throughout my career would describe me as ethical, driven, confident, and optimistic. A current Director recently offered the following comments to the City Commission: "He is an effective leader and maintaining consistency and continuity is critical to the momentum of many projects and initiatives currently underway. From my perspective, the City Manager has always acted in the best interests of the City of Fernandina Beach. The best decision for the City is not always the popular one. His job is a thankless one. He is the first one blamed for any issue, and rarely gets credit for accomplishments. Above all, he is a professional, and I believe that he is ready to carry out the vision of this Commission." More generally, they would say that I am respectful, supportive, and protective of all staff (not just senior members) and that I enjoy engaging junior staff during the course of their duties. The staffs have always been appreciative of my openness and accessibility to every city employee.

The elected officials that I have served would say that I am an outstanding representative of the community. They would say that I am well-prepared and that I am an effective communicator. The members of the governing boards would further say that I am professionally deferential to the elected officials, seeking to enhance their standing in the community through staff support and accomplishments. They have respected my efforts to be bold and innovative or cautiously conservative when appropriate.

I believe that my greatest strength is my ability to engage community leaders and residents. I have historically written a weekly column for local media and introduced a series of classes to inform residents how local government operates. Another strength is my ability to develop and manage the City's annual budget including capital expenditures. Two years ago, I developed and endorsed a budget that included, above the necessary operational millage, an additional 0.5 mills for the purpose of acquiring lands for the purpose of conservation. The City Commission adopted that budget unanimously. The Fernandina Beach budgets during my tenure have regularly realized higher than anticipated revenues and lower than budgeted expenditures.

My weakness is that my confidence in staff can sometimes be misplaced. It is imperative that, until more familiar with individual capabilities, I need to entrust staff a little more cautiously. I can also be overly optimistic. I do believe that with appropriate consensus, local government can be an incredible force. Sometimes, though, that consensus takes a little longer to develop.

To measure success or failure in achieving organizational and individual goals, it is critical that those goals and the related metrics be formally codified. The most significant challenge, though, is developing the measurable metrics: success or failure should be clearly defined and irrespective of whom reviews success or failure. Common metrics include schedules, budgets, and plans, all established at the outset of the effort, tracked during the project, and shared throughout the process. The weight of the success or failure can then be adequately determined.

The most significant success of my career was the culmination of my five-year battle with the Federal Emergency Management Agency (FEMA) to obtain reimbursement funding for Fernandina Beach following Hurricane Matthew (2016). I was savaged by many residents for my "mismanagement" of the FEMA process, but I was supremely confident that the City's effort would eventually prevail- and it did: whereas FEMA's final offer was \$650,000, the City eventually recovered over \$7,000,000.

My biggest career mistake was accepting a job solely based upon a higher salary. It did not take long for both community leaders and I to recognize that I was not a good fit for the community. We parted amicably but the episode was a disappointment for both the community and me.

Throughout my career I have terminated several people, for reasons as varied as criminal activity to policy violations. I view personnel actions, including termination as part of senior management responsibility. I strongly subscribe to progressive discipline and termination, as the ultimate discipline, should be very deliberatively considered.

The initial challenges facing the next City Manager likely begin with familiarization of the community, especially given the relative "closeness" of the community: the City Council; the staff; business, education, religious, and non-profit leaders; regional governmental agencies; and other key stakeholders. Learning the status and progress of key efforts and projects must occur simultaneously to maintain momentum that has been developed. Finally, Belle Isle, like other Florida communities, will begin very shortly the budget preparation cycle for the next fiscal year.

In my first six months in Belle Isle, I would strive to accomplish the tasks associated with the challenges described above. Transitional city government does not provide for "spring training" and to be successful on those tasks will require immediate and intense focus and teamwork.

I have always had an exceptionally close relationship with local media. Throughout my career I have written regularly for local newspapers and online sites. I expect that, if offered a similar opportunity in Belle Isle, I will continue that practice. I also meet annually with local publishers and editors for an in-depth (off-the-record) conversation. I have nothing embarrassing that would cast dispersion upon Belle Isle or any person/agency associated with this search.

Social media is an inescapable challenge for modern local government: an immediate and widely accessible platform can propagate and proliferate genuine or disingenuous information. It is difficult to directly engage and be drawn into the social media morass. It is imperative that official social media sites be promoted frequently as the primary source for timely and accurate information about local government. In Fernandina Beach, I created a Digital Communications Manager position to focus primarily on social media activities (and it has helped to some extent, but the use of social media is a constant barrage that can, at best, be mitigated, not eliminated).

As for my interest in Belle Isle becoming known, I would not be surprised if some "local activists" made an effort to raise concerns: sadly, that is the new nature of public service.

Fernandina Beach, however, remains somewhat embroiled in new challenges since my departure and "activist attention" may have moved onward from my service to that community. If such efforts truly are made, I welcome the opportunity to respond. On the other hand, I can also provide substantial correspondence lauding my professionalism and leadership in Fernandina Beach.

In my leisure time I collect and play board games and recently returned to singing in a barbershop chorus. I also enjoy reading and playing golf.

#### SIX ADJECTIVES TO DESCRIBE MYSELF

- Ethical
- Optimistic
- Accessible
- Trustworthy
- Professional
- Passionate

#### REASONS FOR LEAVING CURRENT POSITION

The political environment in Fernandina Beach markedly shifted following the December 2022 municipal election. Despite broad community support and a record of successful management for over seven years, the City Commission desired different leadership. A Resolution to terminate my employment agreement was adopted at the February 21, 2023, City Commission meeting.

#### **CURRENT COMPENSATION**

My recent salary was \$157,110. Additional compensation included an annual 10% contribution to a deferred retirement plan, a monthly \$500 car allowance, and a monthly \$50 phone allowance.

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# CB&A Background Checks

# **Background Check Summary for DALE LAWRENCE MARTIN**

#### **Criminal Records Checks:**

Nationwide Criminal Records Search No Records Found

County

Nassau County, FL
Litchfield County, CT
Genesee County, MI
No Records Found
No Records Found

State

Florida No Records Found
Connecticut No Records Found
Michigan No Records Found

#### **Civil Records Checks:**

County

Nassau County, FL No Records Found

Litchfield County, CT March 2016 – Civil Lawsuit filed

Against Mr. Martin in his capacity as

Town Manager

Disposition: January 2017,

Judgment After Completed Trial to

the Court with No Jury

September 2014 – Civil Lawsuit filed

Against Mr. Martin in his capacity as

Town Manager

Disposition: April 2015, Judgment

Without Trial- General

\*See Next Page for Candidate Explanation of Records Found

Genesee County, MI No Records Found

Federal

Florida No Records Found
Connecticut No Records Found
Michigan No Records Found

## Background Check Summary for DALE LAWRENCE MARTIN

**Motor Vehicle** 

Florida No Records Found

**Credit** Excellent

Personal Bankruptcy No Records Found

Sex Offender Registry

Not Listed

**Education** Confirmed

**Employment** Confirmed

Social Media Nothing of Concern Found

**From:** dallmart@charter.net [mailto:dallmart@charter.net]

To: 'Lynelle Klein'

Subject: RE: Background Check Records Found that Require an Explanation

#### Good afternoon, Ms. Klein:

The Litchfield County records are related to me and my service/position as the Town Manager of Winchester (located in Litchfield County). The case related to Skinner is a complaint by Officer Skinner related to a previous agreement that he now wishes to rescind (or be ignored) and the Town wishes to enforce. The Town's defense and my defense as a named official are being handled by the Town's insurer. For additional information, please contact Mr. Jonathan Sterling, (860) 392-5042 (Attorney; Carleton, Fields, Jordan, Bert).

The case related to Davidson and O'Connor is the result of the Town's decision to cease providing medical benefits to retired police officers (as permitted by the collective bargaining agreement). These two retired officers are seeking to have their retiree medical benefits restored. For additional information, please contact William Ryan, (203) 752-9794 (Attorney; Ryan & Ryan).

Thank you for the opportunity to review those records. If you require additional information, please contact me.

Sincerely,

Dale L. Martin

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### **Section 6**

# **Background Check Summary for DALE LAWRENCE MARTIN**

Under the Fair Credit Reporting Act, 15 U.S.C. 1681-1681Y, credit and bankruptcy information are very sensitive and should not be used be in the consideration of hiring. The information is included for each candidate because we do not want you to be surprised if third parties raise what they consider to be a concern. Also, some states have limited the reporting to seven years, so any records older than that will not be available in those states. In addition, motor vehicle reports are limited to three to seven years, depending on the state.

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### **Section 6**

### Background Check Summary for DALE LAWRENCE MARTIN Personal Disclosure

### Personal Disclosure Questionnaire

| Name                                   | of Applicant: _                                      | Dale L. Ma   | artin                              |   |  |
|--|--|--|------------------------------------|---|--|
| backgr<br>elimina<br>and that<br>compe | ound. Please<br>ated from all fa<br>at charges do no | answer them harther searches of mean you we ottom line is that | nonestly.<br>conducte<br>re guilty | Cutting cor<br>ed by this firm<br>. We also und | able to make full disclosure to our client concerning your ners or misrepresenting your past will result in you being a. We understand that frivolous charges are sometimes made derstand that you may have been wronged and needed to seek in that our client is fully informed. If you have any questions, |
| <u>Please</u>                          | explain any ye                                       | es answers on a  | separate                           | e sheet of pap                                  | er.  |
| 1.                                     | Have you eve   | r been charged   | or convid                          | cted of a felon                                 | y?   |
|  | Yes  |  | No                                 | X   |  |
| 2.                                     | Have you eve   | r been accused   | of or hav                          | e been involv                                   | ed in a domestic violence or abuse incident?   |
|  | Yes  |  | No                                 | X   |  |
| 3.                                     | Have you eve   | r declared bank  | ruptcy or                          | been an own                                     | er in a business that did so?  |
|  | Yes  |  | No                                 | Χ.  |  |
| 4.                                     | Have you eve lawsuit?                                | r been the subje   | ect of a ci                        | vil rights viol                                 | ation complaint that was investigated or resulted in a   |
|  | Yes  |  | No                                 | X   |  |
| 5.                                     | Have you eve   | r been the subje   | ct of a se                         | exual harassm                                   | ent complaint that was investigated or resulted in a lawsuit?  |
|  | Yes  |  | No                                 | X   |  |
| 6.                                     | Have you eve   | r been charged   | with driv                          | ing while into                                  | xicated?   |
|  | Yes  |  | No                                 | X   |  |
| 7.                                     | Have you eve   | r sued a current   | or forme                           | er employer?                                    |  |
|  | Yes  |  | No                                 | X   |  |
| 1.                                     | Please list link<br>personal web                     | ks to all your so<br>page if you hav                           | cial medi<br>e one.                |   | acebook / Instagram / LinkedIn / Twitter, etc.) and your<br>ww.facebook.com/dale.martin.184007   |
|  |  |  |                                    | LinkedIn: w                                     | ww.linkedin.com/in/dale-martin-b70b13b   |
|  |  |  |                                    | Instagram: fl                                   | odalemartin  |
| 2.                                     | Is there anythic<br>embarrassmer                     | ing else in your<br>nt if it came to li                        | backgrou                           | und that, if ma                                 | de public, would cause you, our client or our firm or any other mechanism?   |
|  | Yes  |  | No                                 | X   |  |
| 3.                                     | Please provid  | le a list of any la  | awsuits in                         | n which you a                                   | re or have been a party either as plaintiff or defendant.  |
|  | None as a nan  | ned individual e   | except for                         |   | as a defendant representing the City Marking sted to:  |
|  |  |  |                                    |   | Signature of Applicant   |

Please email this form via PDF DOCUMENT to <u>Lynelle@cb-asso.com</u> or via fax to (561) 621-5965 no later than 5:00 PM MST 02/21/2023.

Page 15 of 141

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# CB&A Reference Notes

# Reference Notes Dale L. Martin

#### Johnny Miller – Former Mayor, City of Fernandina Beach, FL 904-556-3299

Mr. Miller was on the Commission when Mr. Martin was hired in Fernandina Beach. Mr. Martin was head and shoulders above the other candidates. Mr. Miller became the Mayor shortly into Mr. Martin's tenure.

The Commission was diverse when Mr. Martin came on board, and everyone was going in their own direction. He sat with them individually to help them learn to work together, let go of initiatives that did not have support of the majority, and move in the same direction. He was a fantastic manager and whoever hires him will be very fortunate.

One area that Mr. Martin excels in is visioning. He facilitates an annual discussion where the elected officials decide the goals and then he makes them happen. He tracks the progress of each goal on the wall so that everyone can see the status. This practice also helps keep everyone focused on the Commission's goals.

The covid pandemic was handled very well by Mr. Martin. Another emergency was when Fernandina Beach was projected to receive a direct hit from a category five hurricane. Mr. Martin tried to convince everyone to evacuate because the bridge would have washed out, the only way off the island. Had the hurricane remained on its path, the island would have experienced catastrophic damage. Mr. Martin was out with the staff preparing as best they could, which included stacking sandbags. Everyone was very tense, but Mr. Martin remained calm and cool, which alleviated the tension. Mr. Miller would not have wanted anyone else to lead the process, Mr. Martin did so very well. Fortunately, the hurricane veered and while they still sustained damage, particularly to their Marina, it was not what it could have been.

The damage to their Marina from the hurricane was seven million dollars. FEMA first promised to cover the repairs but later denied the request because they prioritize funding by the most recent emergency. So, later natural disasters took precedence over the damage to their Marina. Residents were adamant that the Marina should be fixed and blamed Mr. Martin for FEMA's actions. Mr. Martin did everything he could for two years, which included working with Senators and establishing a liaison in Tallahassee to work state legislators. He took it all in stride and was successful in having FEMA pay for the repairs to the Marina.

After the shooting in Orlando, the Commission decided to put a rainbow flag in front of City Hall for a few weeks. As they are primarily a conservative community, Mr. Martin took the brunt from those who were unhappy with the display. He took the heat because his main focus was maintaining a good relationship between the Commission and the community.

Not only was Mr. Martin very accessible, but he was also very good about following the chain of command. He generally answered calls on the first or second ring and he has the right demeanor to lead a City. It was never about him, it was about what was best for the City. He never said a bad word about anyone, even under his breath. He was always kind and concerned about members of the community, no matter how they treated him.

b.

### **Section 6**

# Reference Notes Dale L. Martin

Mr. Martin hires good people and then stays out of their way. Good Directors do not ask for things they do not need, so he always tried to provide the resources that they asked for. He was supportive of his staff.

The community really appreciated Mr. Martin's monthly column where he talked about things happening in the City with the occasional personal story if there was not much to report. During the holidays he held a potluck event for people who did not have a place to go for the holidays. He cared, was responsive and did well at keeping everyone informed. He generally knew the answer to any question they asked him but when he did not, he was quick to find it.

Mr. Martin led the budget process very well, which was tough because they have a great deal of beach access and lifeguards are expensive. Everyone is frustrated with how much it costs, but the community does not want to charge for parking. Mr. Martin came up with a plan where residents could scan their license plate and not be charged the parking fee, but out of town visitors would pay for parking. The funds were to be used to help pay the lifeguards and for beach upkeep. Residents did not support this option even though it would have alleviated the financial burden, so Mr. Martin came up with an alternative revenue stream. Whatever they asked of him, or resources they gave him, he always made it work.

Mr. Martin did a community outreach survey every year and asked detailed questions rather than the typical yes or no questions. He wanted to ensure that the organization was spending taxpayer money the right way. One controversial item was a comment he made about making something not look good, but that died down. While controversy and criticism surrounded many other City officials, Mr. Martin was not one of them.

Mr. Martin's departure was shocking, and Mr. Miller has not been able to get a straight answer as to why Mr. Martin was let go. The only thing mentioned was vision, but a Manager's responsibility is to work towards the Commission's vision, they are not supposed to have and carry out their own agenda. Mr. Martin excelled in that regard. He would have done whatever the new Commission asked him to do, as long as it was ethical and legal.

Mr. Miller would hire Mr. Martin in a heartbeat. In fact, he considered running for office again so he could bring Mr. Martin back. He bought a house in City limits when he was hired, which was shocking to Mr. Miller because the city manager office in Fernandina Beach had a revolving door at the time. His response was "I am all in, my family likes it here", and he enjoyed a long tenure. When Mr. Miller hears about things happening in other communities his first thought is always "What would Mr. Martin have done"? Mr. Martin is a fantastic person and manager.

Mr. Martin is who you want to hire if you want a manager who will accomplish your goals. His personal life is above reproach. He was so accessible and treated all Commissioners the same. He gave out his personal cell phone number to residents, fielded the issues, and catered to the community. He is a great hire for any community.

# Reference Notes Dale L. Martin

#### Words or phrases used to describe Dale Martin:

- Dependable,
- Accessible,
- Well educated,
- Networks with various organizations,
- Always took your call,
- Very nice person, and
- Took the heat without letting it affect him.

Strengths: Accomplished, good with visioning, calm, completed the Commission's goals,

very accessible, does not seek credit, works for the good of the community.

Weaknesses: New Commissioners can feel as though their items are not as important because

the established Commissioners already have projects under way. Every Commissioner is important to him, but newly seated ones may need a little more time and reassurance. Also, he worked with them all, kept them briefed, and brought them to consensus, but at times he believed that they knew more than they did and so he did not share information with them. He was not intentionally

withholding information, he just thought they already knew.

#### Tim Poynter – Former Commissioner, City of Fernandina Beach, FL 904-415-6533

Mr. Poynter was on the Commission that hired Mr. Martin and he highly recommends Mr. Martin to any community. He is fantastic and did a terrific job in Fernandina Beach. Prior to Mr. Poynter's election to the Commission, the City went through seven managers in eight years. Fernandina Beach is a small town that is very political. Mr. Martin was their manager for over seven years, a very long tenure in the field, though Mr. Poynter wishes Mr. Martin's tenure was at least double that. While they did not always agree, he executed the Commission's will, and the City has never been in better hands.

The community was hit by Hurricane Matthew and it destroyed their Marina. Mr. Poynter met with Mr. Martin and representatives from FEMA who agreed to pay for the repairs after surveying the damage. When it came time to fund the repairs, they reneged and offered a few hundred thousand dollars instead of the millions promised. Mr. Martin was a bird dog and kept working until they received the promised funding. He was meticulous with the paperwork during the two-year process. He is very capable.

In 2023 Mr. Martin led a visioning meeting with the Commission and department heads. Each Director made their presentation, and everyone was very pleased with the staff and how they worked. Mr. Martin hired and mentored these individuals, and they are doing such a great job.

# Reference Notes Dale L. Martin

Mr. Poynter owns four businesses in the downtown area and has seen the difference with Mr. Martin at the helm. He moved so many initiatives forward, including the seawall that they had been trying to build for over 30 years. They are ready to open up another street over the railroad tracks, which is impressive considering how difficult it is to work with the railroad.

Mr. Martin was an active part of their community and in the region. He attended church on Sunday and started a holiday dinner tradition for those who did not have anywhere to go, because he felt so fortunate. He encouraged people to volunteer time and donate food to the cause. He worked very well with the public and wrote a weekly newsletter to keep everyone informed. He truly had an open-door policy. He is very responsive to the elected officials and residents, he always returned their calls to provide the requested information.

Mr. Martin's financial skills are the best. He hired their comptroller who has done an excellent job and they just received a national award for having the best books in the country, a first for their community. He oversaw the budget process and the finances of the City.

No one handled stress better than Mr. Martin. Even when he realized that he was going to be let go, he was very calm because he understands the nature of the profession. He lasted far longer than the average city manager tenure and put together a wonderful staff.

Mr. Martin's departure from Fernandina Beach was a political coup and many residents stood up at the meeting to support him. Even the Commissioners stated that they terminated his contract without cause. The community and the staff were shocked because the City has never run better. Mr. Poynter was recently talking to two employees from the water department who were looking at the pipes in his restaurant. They discussed Mr. Martin's departure and these long-term employees stated that the City has not run this well in a very long time. Nothing in Mr. Martin's personal life would concern an employer.

Whoever hires Mr. Martin will be lucky to have him. Mr. Poynter would hire Mr. Martin immediately.

#### Words or phrases used to describe Dale Martin:

- Sincere,
- Honest,
- Intelligent,
- Strong writer,
- Religious man, and
- Determined.

Strengths: Great communicator, reached out to the community, honest as the day is long,

does what he says he will do.

Weaknesses: Before going along with any idea, he did his own due diligence and research

which sometimes led him to a different conclusion. So, at times they had to agree

to disagree. That said, everything he did was in the best interest of the city.

## Buddy Jacobs – Community Activist, Jacobs Scholz & Wyler, Fernandina Beach, FL 904-753-5522

Mr. Jacobs has been on the island since 1943 and he has worked with every City Manager in Fernandina Beach. His law firm has been located in the City for 50 years. Mr. Jacobs has known Mr. Martin since 2015.

Mr. Jacobs started the Historical Preservation in Fernandina Beach in 1972 and is active in preservation organizations across the nation. Mr. Jacobs raised money and worked with the City to restore areas of the community. Also, Mr. Jacobs has represented Fernandina Beach on issues such as beach renourishment. During Mr. Martin's tenure they were able to do important work in Tallahassee with the legislature and with Congress in Washington. Mr. Martin is one of the very best managers that Fernandina Beach has ever had.

An article once claimed that Fernandina Beach was the worst place to manage because the average tenure for their managers was 13 months. Mr. Martin lasted seven and a half years, and they were very blessed to have him. He was very active in the community. He volunteered to work with the Veteran's Court and held a holiday dinner for people who do not have a place to go. He was active on the National Council of Aging and helped establish the chapter in Fernandina Beach. He did a fantastic job for their community.

FEMA turned down their requests for reimbursement after a hurricane. Mr. Martin continued to move forward until they received the six million plus dollars promised from FEMA to repair the Marina. His tenacity was excellent and benefitted the community.

Employees hired by Mr. Martin are wonderful and they have been very successful. Ronald Reagan once said that the best thing he learned in politics is that everything is possible when no one takes the credit, which is how Mr. Martin operates. He gives credit to the elected officials and the organization, and it is never about him. What he was able to accomplish was amazing.

In key decisions Mr. Martin does not move forward until he has the Commission's approval. He met with Commissioners every week, they had a scheduled appointment time, and spent as much time with them as they wanted. He led a visioning process every year to outline their goals and then worked with staff to accomplish them.

# Reference Notes Dale L. Martin

Mr. Martin communicated with the public through a weekly column at the local newspaper and met with anyone who requested time. He was very communicative and kept everyone informed. He was able to secure one or two million dollars in state funding every year and received federal funding, though the process takes longer. He had excellent financial skills. He outlined every option and led the budget process well.

When it comes to communication, Mr. Martin responds almost instantaneously to texts or calls, and he works most weekends. In challenging situations, he keeps smiling and does not show any stress. During events like hurricanes, he is involved and works well with everyone.

After an election two new Commissioners immediately began to create problems for Mr. Martin. He was given a chance to resign and would not do so, so the Commission let him go without cause and it seems to be an entirely political decision. His background and conduct are free from any behavior that would concern a reasonable person.

Mr. Jacobs would hire Mr. Martin and is upset by his departure. Whoever hires him will be lucky to have him, but Fernandina Beach will suffer from his departure. Mr. Jacobs works with managers across the state, and he feels that Mr. Martin is the best manager in Florida. Cities with open positions are already reaching out to him to ask him to apply to their community.

### Words or phrases used to describe Dale Martin:

- Best manager in eight decades,
- Responsive,
- Dedicated,
- Flexible, and
- Follows the Commission's directives.

Strengths: Did what he was asked to do, very successful, tenacious for the benefit of the

community, non-political.

Weaknesses: Cares too much about the community and the staff and wants to be sure they are

taken care of.

## Wesley Poole – Former County Judge, Nassau County, and Former City Attorney, Fernandina Beach, FL 904-261-0742

Mr. Poole became a Nassau County Judge in 2013. When Mr. Martin was hired in 2015, Mr. Poole walked from the courthouse to City Hall to introduce himself to Mr. Martin.

A short time later they established the Nassau County Veteran's Treatment Court and Mr. Martin volunteered his time to mentor veterans in the criminal justice system. Mentors help individuals

## Reference Notes Dale L. Martin

with PTSD and traumatic brain injuries that may have contributed to their criminal conduct. Mr. Poole and Mr. Martin got to know each other well as they met at least once a month and sometimes more. The program has been very successful.

Also, Mr. Poole was the City Attorney for Fernandina Beach from 1981 to 1991 and again from 1997 to 2001. He did not work with Mr. Martin in this capacity, but he has insight about their form of government and what the roles are. The environment can be difficult with five bosses and a community that scrutinizes every action the manager makes. Mr. Martin has a very long tenure which is a testament of his abilities. Mr. Martin is very personable, very caring, very genuine, very intelligent and receptive to ideas that are presented to him.

Mr. Martin communicated to the community through a weekly column in the local newspaper. While Mr. Poole and Mr. Martin did not agree on every decision, Mr. Martin had the best interest of the City in mind with every decision he made.

Very visible in the community, Mr. Martin attended social functions, chamber functions and was out and about quite often. His participation in the Veteran's Court was meaningful to those involved in the program. He always put a good face forward for the City.

Fernandina Beach is a quaint town and their speed limit through the downtown area is 15 miles per hour. State law states that a community cannot impose a limit less than 25 miles per hour which became an issue when it came to speeding tickets. Mr. Poole requested a meeting with Mr. Martin and the Police Chief to discuss options. Mr. Martin was very receptive and quick to answer concerns and address the issues.

The golf course and marina are supposed to be assets, but they are generally a drain on the city budget. They were also controversial at times because residents who did not use those facilities did not want their tax dollars to be spent on them. Mr. Martin inherited a management company for the golf course that mismanaged the facility. Mr. Martin dealt with every challenge in the way he felt was best. Overall, he did an admirable job and was always very professional. His conduct and background are clear of any incident that would concern an employer.

Mr. Poole would unequivocally hire Mr. Martin. Mr. Poole worked with five different managers as City Attorney and each had a distinct and different personality. Mr. Martin is one of the best managers Fernandina Beach has had in the last 45 years. Mr. Poole regrets the Commission's decision to let Mr. Martin go, but that is how government works at times. Mr. Poole recommends Mr. Martin to any community.

#### Words or phrases used to describe Dale Martin:

- Good manager,
- Handles multiple issues at once and does well,
- Very bright,
- Very personable,
- Very communicative,
- Very receptive to others' ideas,
- Very responsive, and
- Tried to do the best job he could.

**Strengths:** Effective communicator, conducted himself well, diplomatic, congenial even with

those who complained, very perceptive, aware, hard worker, receptive to

constituents and citizens.

Weaknesses: Working for various personalities with different agendas can be difficult and it is

hard to point out if one is heading in the wrong direction. Mr. Martin could have been a bit more assertive with the Council at times, but for the most part he was

very perceptive. He knew when to speak and when to speak up.

#### Janice Acrum – CEO, Nassau County Council on Aging, FL 904-502-5160

Ms. Acrum has known Mr. Martin since 2015. She has worked with nonprofit organizations and citizens all over the County. She knew upon meeting Mr. Martin that he was special. He says what he means and means what he says. He followed through, listened, and cared about seniors. He was a man of integrity who respected everyone. He was business minded and knew how to manage the dollars and people. He cared about the community and was an impressive manager.

Mr. Martin listens to others and then follows up. He puts the right people in the right position. He has expertise in working with the federal government to bring federal dollars to the community. He excelled in emergency management and led the community through several hurricanes. FEMA is very hard to get money from, but he prevailed. During covid he was very responsive to the community and the seniors, particularly in making sure that everyone had meals, housing or assistance that they needed.

Working for five people with different personalities, Mr. Martin made well thought out decisions. He was very responsive, accountable, and wrote a column in the newspaper to keep the community informed. His columns were well thought out and well written, residents loved them and looked for them. Most residents are very unhappy that he is no longer the manager and cannot pinpoint any action that warranted dismissal.

Even when being insulted Mr. Martin does not flinch. He continues to make the best decision possible for the community. He hosted a dinner for those who did not have families to eat with at the holidays and volunteered his time and resources to make it happen.

More than any other manager in Fernandina Beach, Mr. Martin was visible in the community. He attended functions, chamber events, delegations, meetings, fundraisers, volunteer luncheons, and galas. He worked with diverse neighborhoods and always tried to help them. He supported children, families, and seniors in the community.

Mr. Martin kept Ms. Acrum appropriately informed. He told her when her items were on the agenda, and when she needed to attend the meeting. He was great at following up. He held meetings in the community and liked to pull people together to gather input before making major decisions. He was very transparent and kept everyone engaged.

Betty Burkman's husband passed away and she contacted Mr. Martin to donate \$500,000 for improvements to a park that she hoped would be dedicated to her husband. Ms. Acrum's building is halfway between City Hall and Ms. Burkman's home, so they met together to discuss options. He involved employees and they created a beautiful park.

Mr. Martin's budget presentations and budget hearings were always well done. He knew where every dollar was and answered every question. He was very responsive in general and got an answer the same day or within 24 hours. He is graceful under stress and even the night they terminated his contract, he thanked them for the opportunity to work in Fernandina Beach.

Mr. Martin has not been involved in any personal or professional controversy. He was a gracious and kind public servant. Many residents spoke in his favor at the meeting where the Commission terminated his contract. The Commissioners did not provide a reason, just stated it was time for a change.

Without a doubt, Ms. Acrum would hire Mr. Martin. He told her that he intends to volunteer at the senior center until he secures a new position and will mop the floor or whatever they need. She has a good reputation and does not give references often or lightly, but she will lay her reputation on Mr. Martin. He has integrity, purpose, cares about people, and his word is golden.

#### Words or phrases used to describe Dale Martin:

- Smart,
- Dependable,
- Engaged,
- Involved,
- Integrity,
- Well rounded,
- Listens.
- Problem solver who brings people together,
- True leader,
- Shows people they matter, and
- Cares about the community, he is not in it for the paycheck.

Strengths: Follows through, listens, cares, integrity, respects everyone, good financial and

people skills, listens, very responsive, emergency management.

Weaknesses: None identified.

### Charles George – Deputy City Manager, Fernandina Beach, FL 912-665-1383

Mr. Martin hired Mr. George in 2020 as an Engineer and they worked closely together on capital improvement projects, budgets, and other items. Mr. Martin moved Mr. George to the Community Services Director role and later promoted him to the Deputy City Manager position. They interacted often during the day both on administrative items and on projects. Mr. George cannot say enough good about Mr. Martin.

Mr. Martin had overall responsibility for 270 employees, and he managed them well. He gave clear direction to the staff and held them accountable along the way. He had a good rapport with state and local agencies like the railroad, port, county, state regulatory agencies, and federal agencies like FEMA and the EPA.

Decisions made by Mr. Martin are well thought out and he analyzes a situation from all perspectives to find the best course of action. Once he has Council buy in, he is off and running to complete the mission. He is innovative and he maintains an organization at a high-performance level. He suggests options that employees have not thought of and encourages staff to make them a reality while supporting them along the way. He is very motivating with staff.

Mr. Martin was involved in several charitable and community organizations like The Council on Aging, Keep Nassau Beautiful and other civic groups. He enjoyed being part of the community and helping them move forward. He was also involved in advisory boards related to parks and recreation, the marina, and the golf course.

With an open-door policy, Mr. Martin works very well with the public. Everyone knew his phone number and email. He always responded even when he could not give residents what they wanted. He was open to comments, criticisms and dialogues, and did what was best for the City.

The City has many parks and residents have an invested interest. Seniors have different needs from the youth. Mr. Martin listened to children and parents in the community to learn what they wanted in the parks and then blended their ideas into what the older generation wanted. He promoted various projects and events to bring people together.

Historically the City, the Port, and downtown business owners have had a contentious and adversarial relationship. When Mr. Martin was hired, he was able to heal the relationships and encourage better communication and cooperations between the agencies and the city.

Being involved in budget preparation and financial management, Mr. Martin had great financial skills. He guided the staff through the process, showing pitfalls while also ensuring that each project fit with the elected body's goals for the community. He took a very calm approach in even the most stressful situations. He was a calming influence on the staff and worked the problem rather than worrying about the problem.

At times there are gaps between what citizens demand and what the Commissioners want to do, and Mr. Martin had to bridge that gap. He was often criticized for the decisions made by the Commission, but he was not involved in any extreme or personal controversy. Employees enjoyed working with Mr. Martin.

Mr. George would hire Mr. Martin, as he is the best Manager that Mr. George has worked for. Mr. George has been both a consultant and a government employee. Most managers do not take the community to heart like Mr. Martin does. He props up the staff and is just really good. Whatever community hires him will be better for having him. Fernandina Beach has improved through his leadership and the way he was able to accomplish the goals was impressive.

### Words or phrases used to describe Dale Martin:

- Great leader,
- Great communicator,
- Diversified.
- Open minded, and
- Problem solver.

#### **Strengths:**

Bold, focused, good personnel management, bridge between Commissioners and the staff – and handled it well, good task manager, good aptitude for multitasking and keeping everyone on the same page.

Weaknesses: Overall there is not much to fault him for. He gave staff a little too much freedom to improvise and then sometimes had to pull them back when they went outside their comfort zones. When Commissioners were taking a political route and he recognized that the path was not in the best interest of the community, he pushed back a little more than some would like.

#### Chip Ross – Commissioner, City of Fernandina Beach, FL 410-394-0220

Mr. Ross met Mr. Martin when he was hired in 2015. Mr. Ross was elected to the Commission in 2018 and they worked together in this capacity until 2023. Their relationship was strictly professional, they did not socialize. They met together with the City Attorney for two hours every Tuesday to go through everything. Mr. Martin followed up, knew his stuff, and did what the Commissioners asked him to do.

## Reference Notes Dale L. Martin

Mr. Ross is often out in the community and talks to people in the community. He asks if they like how the city is being run and 99.9% have stated that they would not change a thing. The city ran well under Mr. Martin's leadership, and he put together a good management team.

A typical Dale Martin story is that he put together a holiday dinner at his church and paid for it himself where anyone could come and have dinner, particularly those who did not have families to celebrate with. He worked hard and was well liked in the community. He was a good manager and an excellent public servant.

Well known in the community, Mr. Martin went to all the events and was very active in civic organizations. He wrote a weekly article in the local newspaper about the City. At the 2023 visioning session not one Commissioner or employee mentioned a problem with Mr. Martin's management. All of the City departments are running well.

Mr. Ross has a network and knows more than most. Mr. Martin has never kept anything from him. When Mr. Ross asked about something confidential, Mr. Martin would just reply 'not yet, I am still working on it'.

Fernandina Beach is a barrier island and has a historic downtown. The community has talked about putting in a seawall and a river walk for more than two decades. Mr. Martin pulled the team together to install a river walk and partially funded it with state dollars. He was also able to move the seawall project forward.

Hurricane Matthew annihilated their Marina. Mr. Martin not only rebuilt it, but he ensured that FEMA paid for it. He moved heaven and earth to fix the Marina and then was blamed by residents when FEMA denied the initial claims. He was persistent and, in the end, FEMA paid 6.8 million dollars plus 300,000 in interest, which was a first in the history of FEMA.

While Mr. Martin prepared a good budget, a small minority in the community feel that the City should cut taxes. However, the City was not able to retain staff until they were more competitive in their pay. They are currently fully staffed. He completes tasks in a timely manner and was very pleasant in challenging scenarios. He was very professional and very calm, even at the end.

Fernandina Beach is very controversial, but nothing happened that implicates Mr. Martin. One of the Commissioners who was newly elected told Mr. Martin that he was doing a great job and he was looking forward to working with Mr. Martin. Commissioners also mentioned how well staff was doing, but then voted to terminate Mr. Martin's contract the next day.

Mr. Ross tried hard to keep Mr. Martin and was sad to see him go. His departure will set the community back a number of years. Residents who are pillars in the community, spoke in his defense. Mr. Ross never heard a complaint about Mr. Martin or his management. While no one is perfect, he did a good job. Their loss is another community's gain.

#### Words or phrases used to describe Dale Martin:

- Hard working,
- Good public servant,
- Intelligent,
- Motivated,
- Good manager, and
- Hired first class Directors.

Strengths: Always pleasant, tries to reach consensus, works with others, tries to please the

Commissioners and community.

Weaknesses: He had a hard time firing people and could have coached employees better at

times, but other than that he did a good job. He was not terrible at anything.

#### Suanne Thamm – Founder, Fernandina Observer, Fernandina Beach, FL 904-206-6362

Ms. Thamm is the Founder of the Fernandina Observer. She spent years going to every Commission meeting. Mr. Martin is an outstanding manager.

Unlike previous managers who hid behind their desks, Mr. Martin was always out and about. Whether it was a civic or social activity, he made it a point to touch all the bases. He worked with the chamber and met with new businesses in town. He worked with the tourism industry and was very open and available to everyone, while keeping them all informed.

Mr. Martin made excellent hiring decisions. When Ms. Thamm first moved to Fernandina Beach the only qualification for City employment was to live in the City. Mr. Martin completely revamped the hiring process and hired a highly professional and diverse staff. The employees he brought in are well respected in the community.

When the Commission voted to terminate Mr. Martin's contract, everyone in the audience, except one, stood for Mr. Martin. Everyone was so confused and bothered by this action. The community made more progress through his leadership than it has in decades.

Being responsive, if Mr. Martin did not have the answers at hand, he listened carefully to what they had to say and quickly found the information for them.

All Mr. Martin did was solve problems. He put together a citizen's committee to deal with issues related to beach access. Fernandina Beach has 44 public beach access points and not all include parking. An engineering study showed that many of them should be closed because they have not been attended to in years. He put a committee together and then stayed out of it. They came

# Reference Notes Dale L. Martin

together and created a plan for repairing beach access points while prioritizing the projects. The Commissioners and the staff were happy with the plan, as was the entire community.

Mr. Martin always created a responsible budget and was very good at the capital improvement process. He encouraged Commissioners to stick to established priorities rather than becoming distracted by the next shiny thing.

Always responsive, Mr. Martin replied to texts and phone calls the same day. He enjoyed working with others and wrote a column in the newspaper to give people an opportunity to know him better and see what the City was working on.

Never looking stressed, Mr. Martin had a very calm demeanor and stayed out of the politics. He did not set his own priorities like previous managers had. He led a strategic planning process at the beginning of every year so the Commission could set priorities, and then he always completed their objectives.

Nothing Mr. Martin has been involved in has risen to the level of controversy. He was dedicated to resolving problems that have existed for years. Nothing in his conduct or background would concern a reasonable person. The only people who might complain about Mr. Martin are those who are not bothered by facts or real budget concerns.

If it were up to Ms. Thamm, Mr. Martin would still be the Manager in Fernandina Beach. He is the best manager that she has seen in three decades. While they have a small population, they are extremely complicated with a Marina, golf course and seven miles of beaches to maintain. Mr. Martin learned Florida regulations and hit the ground running in a short period of time. He became a strong part of the community and provided solutions to their issues.

### Words or phrases used to describe Dale Martin:

- Organized,
- People friendly,
- Action oriented.
- Apolitical, and
- Fiscally prudent.

Strengths: Great communication skills, loves people, always out and about, very open and

kept everyone informed.

Weaknesses: He puts a great deal of trust and loyalty in subordinates and does not

micromanage. By and large, Directors rose to the occasion but every once in a

while, it was a problem.

### Nathan Coyle - Airport Director, City of Fernandina Beach, FL 904-430-1113

Mr. Coyle reported directly to Mr. Martin from 2017 to 2023. Mr. Martin is a strong performer, and a strong leader to the community and the staff.

Mr. Martin's ability to build a circle of qualified individuals was very strong. He inherited some personnel issues and turned them around to create a professional organization. He was transparent in his decision-making process in general and was always willing to listen to feedback. He was good about keeping everyone informed.

Active in the community, Mr. Martin was very visible. When the Commission voted to terminate his contract, a strong group of citizens publicly supported him. He started a citizen's academy to teach residents about local city governance. He was well connected to the community.

They did not have a capital improvement process for large projects. Mr. Martin led a team to create one. He formalized a committee with Directors and other employees. As part of the budget process, this committee reviews capital improvement projects and prioritizes them, which helps to establish their capital plan. Mr. Martin leads the process every year.

Tasks within Mr. Martin's control were always accomplished in a timely manner, but he did not have full control over every aspect. He was very cognizant of timelines. He handled stress well without showing any signs of it. Employees said that he has big shoulders, and he saw through the challenge to get to the meat and potatoes of what needed to be done. Employees function better when their leader is not stressed, and he always remained calm and professional.

Finance was Mr. Martin's strength. He was an astute individual with good business acumen. He hired their comptroller and had a good sense for putting the right person in the right position. There was never any indication of issues or concerns with Mr. Martin.

Fernandina Beach is fairly political for a small town and a number of proposals are controversial. Mr. Martin was direct and transparent almost to a fault, which is beneficial in these situations. The best thing a manager can do is lay the issues out and discuss them. He addressed development and airport issues that were contentious, but he was transparent and handled them well. He does not participate in activities that would concern an employer.

Most Directors worked well with Mr. Martin and appreciated him. A few Directors did not feel that he was as supportive of their needs, but it seemed to be the departments with performance related issues. After an election and a change of the guard, the Commission decided they wanted a new face for the City. Their reasons were petty and minor and are not the true reason they terminated his contract.

Mr. Coyle would hire Mr. Martin and would work with him again in a heartbeat. He is a great manager. What you see is what you get with Mr. Martin. He values professionalism.

#### Words or phrases used to describe Dale Martin:

- Strategic,
- Direct does not hide anything,
- Painfully transparent, and
- Astute.

**Strengths:** He has a great knack for taking complex issues and simplifying them to individual

tasks so they can move forward. He resolved several issues that had been stagnant

for decades.

Weaknesses: None identified.

#### Denise Matson – Human Resource Director, City of Fernandina Beach, FL 239-564-6218

Mr. Martin hired Ms. Matson in 2020 and they worked together until 2023. She has worked in government for almost 40 years, and he is one of the best managers she has ever worked for.

Decisions made by Mr. Martin are good. He maintains an organization at a high performance level but is also willing to initiate change when necessary if it will improve operations. He keeps everyone informed.

Fernandina Beach is a small knit community. Mr. Martin was at every event and encouraged the Directors to attend. He was very responsive to the public, and he handled the naysayers well. He was responsive to residents' concerns and was transparent. He was customer service oriented.

A visionary, Mr. Martin instituted an annual visioning process with Commissioners to ensure he was following their vision. He helped them implement capital projects and other programs.

Mr. Martin had an approved budget with very little input from residents, which meant they were comfortable with the way he managed the resources of the community. He completed tasks in a timely manner and managed stress through exercise.

No one expected the Commission to terminate Mr. Martin's contract. He has always been responsive to their goals and needs, but the newly elected Commissioners have their own agenda. Ms. Matson has not heard anything disparaging about Mr. Martin. Everyone says how great he is and how much he has done for the City. He will be a great manager for any community.

## Words or phrases used to describe Dale Martin:

- Leader,
- Motivator,
- Compassionate but direct when needed,
- Responsive,
- Community oriented, and
- Team builder.

Strengths: Responsive, dedicated, compassionate but firm when needed, great leadership,

strong management skills, has a sense of community, visible in the community,

built a great team, team oriented, works with Directors to lead the City.

Weaknesses: None identified.

**Prepared by:** Lynelle Klein

Colin Baenziger & Associates

b.

## CB&A Internet Research

## Internet – Newspaper Archives Searches Dale L. Martin

(Articles are in reverse chronological order)

https://www.fbnewsleader.com/local-news/city-commission-terminates-city-manager-dale-martin-appoints-former-fbpd-chief-mark
Tuesday, February 21, 2023

## City Commission terminates City Manager Dale Martin, appoints former FBPD Chief Mark Foxworth as interim

By Julia Roberts on

While the overwhelming majority of people addressing the Fernandina Beach City Commission spoke in support of City Manager **Dale Martin**, after discussion the commission voted to terminate his employment effective immediately at the Feb. 22 City Commission meeting. Commissioners Chip Ross and James Antun voted to keep City Manager **Dale Martin** and Mayor Bradley Bean, Vice Mayor David Sturges and Commissioner Darron Ayscue voted to terminate.

Mayor Bradley Bean said he had been in discussions with former Fernandina Beach Police Department Chief Mark Foxworth to serve as interim manager. The City Commission approved Foxworth to be hired as interim city manager in a 5-0 vote.

City Commissioner David Sturges made a motion to terminate **Martin's** employment with the city at the Feb. 7 meeting. The commission voted to postpone the matter until the Feb. 22 meeting. Sturges had a laundry list of reasons he believes **Martin** should be fired, including what he called a lack of leadership in the matter of the Bretts Waterway Cafe lease, his termination of Road Department Manager Rex Lester and his alleged language when speaking to department heads about a presentation by Commissioner Ross to cut each department budget by 10%.

At that meeting **Martin** answered most of the charges brought by Sturges, and Commissioner Chip Ross also rebutted Sturges' accusations.

Under the conditions of his employment contract, **Martin's** employment can be terminated "for any reason or for no reason prior to the expiration of this Agreement. Cause for termination shall consist of dereliction of the duties of City Manager."

The contract goes on to define "dereliction of duties." "Dereliction of the duties of City Manager is defined herein as, acts of gross misfeasance or malfeasance, gross misconduct which constitutes conduct demonstrating willful or wanton disregard of the City's interests, a deliberate violation or disregard of the standards of behavior to which the City Commission has a right to expect of the City Manager, carelessness or negligence to a degree or recurrence that manifests culpability, wrongful intent, or shows an intentional and substantial disregard of the City's interests or of the City Manager's duties and obligations to the City, including but not limited to conduct resulting in material harm to the City, willful neglect or failure to perform his duties as described herein and in the City Charter, gross insubordination or acts of dishonesty." The contract requires the city commission to furnish the city manager with written notification of the grounds for discharge prior to his discharge, and, if requested by the city manager, a public

## **Section 6**

### Internet – Newspaper Archives Searches Dale L. Martin (Articles are in reverse chronological order)

hearing prior to making a decision on the termination. That hearing must occur between 20 and 40 days of that notification. Termination requires a majority plus one (4-1) vote of the city commission. The commission can, however, terminate the city manager's employment without cause, if he is given a 30-day notice. "It shall not be necessary for the City Commission to have or state any specific cause, reason or ground to support a motion to terminate this contract," the language says.

After termination the city manager is entitled 12 weeks salary and compensation of accrued vacation and sick time, not to exceed 96 hours. Under **Martin's** current salary of \$157,110, that would amount to \$36,256, which would be paid in biweekly installments.

## Internet – Newspaper Archives Searches Dale L. Martin

(Articles are in reverse chronological order)

https://fernandinaobserver.com/city-news/late-commission-news-a-move-to-fire-the-city-manager/

Fernandina Observer February 8, 2023

Late Commission News: a Move to Fire the City Manager

Author: Mike Lednovich

Citing a litany of mismanagement and lack of communication, Vice Mayor David Sturges called for the termination of City Manager **Dale Martin** at Tuesday's City Commission meeting. This was very late in the evening, after the audience of citizens had left. "I'm making a motion to terminate **Dale Martin**'s contract without cause and give him a 30-day written notice immediately," Sturges said right after **Martin** had given his city manager's report to the commission. The commission would eventually vote 3-2 to postpone the decision until the next commission meeting.

"I know it's late in the hour and it's city business and if it wasn't important I wouldn't be bringing it up," Sturges said as he began listing his reasons to terminate **Martin**. Sturges said **Martin** has engaged in mismanaging the city and cited the following:

- Before becoming a commissioner, Sturges said he attended a City Commission budget meeting at which the city manager looked up city property owners on the Nassau County Tax Appraiser's website, identified the owners by name and read their tax bills, thus publicly embarrassing the property owners.
- He said the termination of 30-year plus City Streets Director Rex Lester without cause 18 months before his retirement was wrong.
- Sturges claimed the city manager delayed the decision to terminate the city commissioners' health benefits for six months until one commissioner was eligible for Medicare, which was selective management.
- In the Brett's Restaurant debate about closing the establishment, Sturges said Martin failed to persuade commissioner Chip Ross to delay asking about insurance issues thus "disgracing our city." He said Martin hijacked the ensuing City Commission meeting and showed favoritism to Commissioner Ross on the Brett's issue.
- On the Brett's lease, Sturges charged that **Martin** has manipulated the Request for Qualifications (RFQ) process to favor one potential company. He said it was unacceptable financial mismanagement.
- Sturges said he learned of Airport Manager Nathan Coyle's resignation from reading about it in the local newspaper instead of being told about it by **Martin**.
- The vice mayor said in the hiring of a new police chief, **Martin** had ignored his request to meet to discuss with him the hiring. "I would think he would listen to my input since I'm one of his bosses," Sturges said.

## Internet – Newspaper Archives Searches Dale L. Martin

(Articles are in reverse chronological order)

- Sturges said on the hiring of a new police chief that interim Police Chief Jim Hurley had left the position and that the deputy police chief was not given any instructions on what his responsibilities would be until a new police chief is hired.
- Sturges said he learned that **Martin** had informed city staff that Commissioner Ross was preparing an upcoming (2023-2024) budget report about the impact of 10% department budget cuts. Sturges said **Martin** told city staff "to make it look ugly." Sturges said he verified the statement with three city department heads.

"The city manager does not control my behavior regarding Brett's," said Ross in rebutting Sturges' claims for terminating **Martin**. "This is baloney....and it has nothing to do with the city manager." Ross also said it was "totally inappropriate" for any city commissioner to be involved in the hiring of a city department head, according to the city charter. "I think the city manager has done a good job. The airport works, the marina works. The whole thing with FEMA was hundreds of hours of time and we got an excellent result. (His termination) would put this whole city into chaos," Ross said.

**Martin** said he had made some mistakes, but pushed back on Sturges' claims about Brett's and the hiring of a new police chief. "Commissioner Ross and I do not discuss Brett's. I completely disagree with his handling of Brett's," **Martin** told commissioners. "It is on the next City Commission agenda that the city will suspend any code actions against Brett's."

On hiring a new police chief, **Martin** read an email exchange with Sturges regarding potential candidates just before Christmas of last year. He said he intends to announce a new police chief at the next City Commission meeting. "I personally reviewed 61 police chief applications and interviewed six (finalist) candidates. It's a difficult decision," **Martin** said.

Commissioner Ayscue said "sometimes this is a very healthy discussion to be had because we can't discuss these things among ourselves," he said. "The 10% make-it-hurt comment, I did hear that from a few department heads as well."

Mayor Bradley Bean spoke last before the vote to postpone the decision. "I have had frustration in the past with direction and policy," Bean said.

**Martin** told commissioners they had laid out his shortcomings and asked for the opportunity "to prove to you I can work with this commission, which is a whole 180-degree different change (than the previous commission). This is a transition period and I will support this City Commission."

## Internet – Newspaper Archives Searches Dale L. Martin

(Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **Dale L. Martin** is listed below.]

Republican-American (Waterbury, CT) June 20, 2022

### pic w/lead and 4th item

Author: Kurt Moffett

Town managers get the band back together for mural opening Who knew that the opening of the American Mural Project in Winsted would blast open a portal into the past?

Former town managers Robert Geiger and **Dale L. Martin**, as well as former Town Planner Ray Carpentino, all made appearances at a pre-opening bash on Friday night for some 200 invited guests and supporters. The project, more than 20 years in the making, was opened to the public for the first time on Saturday.

Particularly impressive was the appearance of **Martin**, who moved to Florida where he took a similar job in late 2015. He told attendees that he rented a car and drove here after his flight in Atlanta was delayed.

Project founder Ellen Griesedieck, in lauding **Martin**'s efforts to support her project, made reference to when Republicans in 2014 suspended **Martin** and tried to fire him. "They tried to kick this guy out," she said.

Carpentino has not worked for the town since 2006. Geiger, Martin's successor, retired in 2021.

### Internet – Newspaper Archives Searches Dale L. Martin (Articles are in reverse chronological order)

shaanyan aana/aity nayya/famandina haaah aity manaaan dala mantin an ai

https://fernandinaobserver.com/city-news/fernandina-beach-city-manager-dale-martin-on-city-achievements-and-challenges/

Fernandina Observer March 28, 2022

## Fernandina Beach City Manager Dale Martin on City Achievements and Challenges Author: Suanne Z. Thamm

Upon entering the office of Fernandina Beach City Manager **Dale Martin** you can't help but notice a couple of dented tin cans on his desk. These are two of the proverbial cans that have been kicked down the road only to land squarely on **Martin**'s desk as action items. There is also a large white board on the wall listing projects in one state of completion or another. You get the message: **Martin**'s office is mission control for the City of Fernandina Beach, Florida.

**Martin** has now completed six and a half years as City Manager and says he loves coming to work every day. His tenure as City Manager is the longest the City has experienced in at least 30 years. He is an action-oriented guy who understands that he works for five very different bosses on the City Commission as he directs staff to implement the policies and priorities established by the City Commissioners at their regular and special meetings.

On March 23, Fernandina Observer Editor Susan Steger and I sat down with **Martin** for an informal chat about ongoing and future plans for the City as seen through the eyes of the City Manager. **Martin** has a friendly, open communication style and is justifiably proud of City staff and recent accomplishments while looking forward to upcoming challenges presented by dramatic Nassau County population growth that impacts the city, aging infrastructure and City facilities, and increasing demand for city services.

One of **Martin**'s goals is to provide the citizenry with a more complete understanding of the roles of both the elected governors (the City Commission) and the work of the City which he oversees. He has worked diligently to improve communication between the City and its constituents. He pens weekly columns that are published both in the Fernandina Observer and the News Leader in attempts to explain matters like the often-confusing City budgeting process, tax bills, progress on the Amelia Riverfront projects, the CRA, and a host of other topics. **Martin** writes these columns at home so that they do not take time from his day job as City Manager.

Martin has also initiated a program called "Citizens Academy." Although interrupted by Covid for a couple of years, it is now back and well received by those in the community who want to learn more about City government to better understand the how's and why's surrounding various City operations and the decision-making process. The current class was fully subscribed the day after it was announced. So many people have tried to enroll in this free course that Martin has scheduled another session for the fall. Again, he runs this program on his own time after normal City business hours.

# Internet – Newspaper Archives Searches Dale L. Martin (Articles are in reverse chronological order)

(Articles are in reverse chronological order)

Despite Martin's efforts and other City efforts at improving communication (broadcasting meetings of the FBCC and the advisory boards, increased presence on social media, etc.) getting the word out continues to be a challenge. Martin said that the City is preparing to conduct its third Citizen Survey this spring, this time available to all city residents in an online format, to once again try to determine the major issues identified by the citizenry. Martin said, "A key challenge is that every City Commissioner wants to get as close as possible to universal support for every project. Whenever projects with generally strong City Commission and public support are prepared, relatively small numbers of detractors give the City Commission pause, and the whole process falters, leading to the accomplishment of little. Very few projects will be unanimously endorsed but the perspective of what is in the best interest of the City, as determined by the City Commission, is a critical policy decision."

Due to political decisions over the years to keep taxes low, proper maintenance and replacement of City assets has been routinely delayed — one of those cans being kicked down the road. Today many City facilities need major infusions of cash to bring them up to code and to continue their useful lives. To spread the cost out over time, thereby allowing future users of these facilities to share in the cost burden, a special financing mechanism — the General Obligation Bond (GOB) — will be presented to the voters for approval this year. The decision to take this matter to the voters is a policy decision, made by the FBCC, not the City Manager. Martin's job, along with the job of City Attorney Tammi Bach, will be to execute the decision, when the FBCC finalizes its decision regarding which projects and how much money will be needed to complete those projects. Martin discussed the GOB in his Weekly Comments this past Friday.

The relationship between the FBCC and the City Manager often causes confusion for the public. **Martin** said, "General direction for the Manager and City staff comes from the Commissioners. The Manager's job is to provide Commissioners with a variety of options to achieve community goals."

**Martin** anticipates that several projects of long standing (those kicked cans again) will have been completed by mid-fall: upgraded rail crossings at Ash and Centre Streets; the first phase of the seawall along the river. Also, work to open the Alachua rail crossing, an unfunded priority for 40 years, will be well underway.

Martin was candid in discussing some challenges facing the City. He lamented a lack of long-term focus on City needs and improvements by both citizens and successive Commissions. He was also highly critical of the recent Visioning Project, which Commissioners authorized to the tune of \$100,000, but which has not produced the intended output. "In my 25 years as a City Manager, this is the most frustrating project I have ever had to deal with," he said.

The Parks and Recreation Department accounts for 17 percent of the General Fund budget and is responsible for many programs and facilities in addition to maintaining seven City parks. The City is in the process of recruiting a new Department Director to address the many challenges faced in balancing the recreation needs of young families with those of an aging overall population. Complicating the issue is the strain put on the services by non-city residents and

## **Section 6**

# Internet – Newspaper Archives Searches Dale L. Martin

(Articles are in reverse chronological order)

island visitors, who do not pay for the services they receive from the City. The City, Nassau County, and the Tourist Development Commission regularly wrestle with finding a fair way to allocate funds to pay for increasing service demands. But there are many successes, too. The newly invigorated Fernandina Harbor Marina is doing very well, both in the view of boaters and in financial terms for the City. Even the Golf Course appears to be turning around. Membership is up 50.4 percent over last year.

Martin remains positive about the City and making progress toward meeting Commission goals. "Things are moving forward. This has been a good year with finally receiving compensation from FEMA for damage to the south basin of the marina during Hurricane Matthew in 2016. City departments are working much more collaboratively to provide services. We are about to break ground on a new fire station at the airport. The Isle de Mai drainage issues are being addressed. We have a citizen-generated plan to address our beach accesses. We are finally starting to see improvements in the CRA.," he said. "This has been a good year, and the City will have a very busy summer," Martin said.

## Internet – Newspaper Archives Searches Dale L. Martin

(Articles are in reverse chronological order)

https://chnassau.com/fernandina-commission-and-coalition-for-the-homeless-prepare-for-cold-nights-with-new-agreement/

Coalition For The Homeless February 16, 2022

## Fernandina Commission and Coalition for the Homeless Prepare for Cold Nights With New Agreement

Author: Unknown

The Fernandina Beach City Commission tonight approved by unanimous vote a facility use agreement with the Coalition for the Homeless of Nassau County to operate a cold night shelter in our community for the next three years.

"For too long, those most in need in our community have struggled to find a warm place to stay on cold nights. Tonight, that all changed. Thank you to the Fernandina Beach City Commission, City Manager **Dale Martin** and City Attorney Tammi Bach for recognizing this need that exists in our community and working with us to ensure we had a solution," said Joe Zimmerman, Executive Director.

"I also want to recognize that none of this would be possible without the vision of Carlene McDuffie, our Board President. She is truly an asset to our Board, and a fearless advocate for the needy in our community. I am thankful for her and our Board of Directors who serve as ambassadors in our community."

The Cold Night Shelter will be open on select nights when the temperature drops below 40 degrees. Those who wish to volunteer or learn more about the Coalition for the Homeless of Nassau County can visit our website at www.chnassau.com.

### Internet – Newspaper Archives Searches Dale L. Martin (Articles are in reverse chronological order)

https://fernandinaobserver.com/city-news/a-conversation-with-fernandina-beach-city-manager-dale-martin/ December 22, 2020

## A conversation with Fernandina Beach City Manager Dale Martin Author:

Recently Fernandina Observer Editor Susan Steger and I sat down with Fernandina Beach City Manager **Dale Martin** for an informal chat about the state of the City. **Martin**, who has recently completed five years as the City's chief executive, continues to express his enthusiasm for his job and his confidence that the City will continue to make progress in addressing long standing problems relating to deferred maintenance, the downtown waterfront, and returning the City Marina to full operation in 2021. When the City conducts its annual goal-setting session in January, two new commissioners will have replaced John Miller the longest serving commissioner who term limited out after 7 years in office and Phil Chapman who declined to run for a second term. Miller, who also served as Mayor for 3 of the past 4 years, has been replaced as Mayor by Commissioner Mike Lednovich during the FBCC's reorganization meeting on December 15, 2020.

Under **Martin**'s leadership, the City has experienced a variety of changes, some more subtle than others. From a media perspective, the City has become much more transparent. The City has established a presence on social media, including Facebook, Instagram, and Twitter. Meetings of not only the City Commission, but also of advisory boards are live streamed and closed captioned. Full agenda packets are available online days in advance of FBCC meetings.

Early on in his tenure, **Martin** began his practice of providing a weekly column to local media. This column has helped the community get to know him better and helped him communicate facts about many important City projects and plans that are sometimes inaccurately presented on social media. In order to further educate the public on how municipal government works in Florida, Martin has regularly offered his Government Academy through the Nassau County Council on Aging. Many people, keen to better understand why government does or does not "work like private business," have taken these classes. But despite the best efforts of Martin, City officials and local media, many people still do not seem to understand how government works. When we asked Martin what his biggest frustration is as City Manager, he replied after some thought, "The unfamiliarity of some citizens as to how local government operates." He expressed regret that Facebook and other social media appear to dominate "the news," leaving the government and responsible local media in the position of trying to overcome erroneous rumors with facts. Martin disagreed with the comment that most citizens don't care, instead indicating that they are likely satisfied with most programs, services, and the direction of the community. "That doesn't mean," he added, "that opportunities to improve cannot be explored." Martin is extremely proud of the City workforce, pointing to the good work done by workers who have been with the city for many years and recent hires. Under his direction, new hires have assumed leadership of many departments: Airport, Building, Finance, Grants, Human Resources, and Stormwater. But Martin acknowledges that the City has also lost years of experienced

### Internet – Newspaper Archives Searches Dale L. Martin (Articles are in reverse chronological order)

leadership and service with retirements over the last 5 years. Most recently, long time Utilities Department Director John Mandrick retired. His function has been taken over by Mr. Charles George, designated as the City Engineer, who also serves as project engineer for significant activities that cross department lines, such as the downtown waterfront.

In addition to citing City staff, Martin also praised the City Commissioners who have worked hard over the past 5 years to put aside any personal differences to move the City forward. "Despite differences in approaches to problem solving," Martin said, "most of the decisions coming out of this recent Commission took the form of unanimous votes. These Commissioners were determined to address long standing problems, like opening the Alachua rail crossing, waterfront resiliency and improving the downtown waterfront. While progress has not necessarily been as fast as they or the public wanted, they have continued to "move the ball down the field." Martin also cited progress in the areas of conservation, attributable to public demand expressed through their elected commissioners and a successful voter referendum, which strengthens the City's commitment to preserving recreational and conservation lands via a charter amendment. Also, after many years of debate and controversy, the City has opened a new airport terminal, which has been well-received by the flying public. In looking to the future, Martin expressed hope that intergovernmental relations will continue to improve. He said that on the staff level, City and County staffs have been working well together. But frustrations in dealing with the Ocean Highway Port Authority continue. Martin noted that a successful Port operation can be a key economic asset to the City if the elected boards can work out their differences.

Other areas that will require attention in the near-term relate to City facilities. The City has invested significantly to improve the Peck Center Building. However, to prevent significant damage from water intrusion, the brickwork needs repointing. The City is pursuing a grant to help in that regard. The Atlantic Avenue Recreation Center, built in the 1950s, needs attention, as does City Hall, which has been remodeled significantly since its construction over a hundred years ago, to accommodate modern office needs and requirements of new technology. A new fire station is being planned to better serve developments and newly annexed areas in the southern part of the City as well as the Airport. Another area the City must address in the near future is accommodating growth in Bosque Bello, the only municipal cemetery. The City will jump start stalled plans to build a columbarium to reflect new burial practices and extend the physical life of Bosque Bello beyond its current space set to expire in 2025-27.

"For a 'small' city, Fernandina Beach has many things going on. It is sometimes difficult to keep the attention of Commissioners and the community focused on stated priorities before jumping into additional projects," said **Martin**. "Nonetheless, it is certainly worth recognizing that while styles differ, everyone desires a strong and vibrant community." City Manager **Dale Martin** can be seen regularly out and about in the community. He actively participates with the regional Florida Council of Cities and serves on Nassau County's Veterans Court. He is an active member of the First Presbyterian Church. He and wife Lisa, who works for the Nassau County Council on Aging, continue to express their joy at living and working in Fernandina Beach. "This is a wonderful, special place," **Martin** said, "and our happiness in living here grows with each year."

# Internet – Newspaper Archives Searches Dale L. Martin

(Articles are in reverse chronological order)

https://fccma.org/2020/10/meet-dale-martin-city-manager-fernandina-beach/

FCCMA October 2020

#### Meet Dale Martin, City Manager, Fernandina Beach

#### How long have you been a FCCMA member and why did you join?

I became a member of FCCMA following my appointment as the Fernandina Beach City Manager in December, 2015.

Are you an ICMA member, why did you join, and how long have you been a member? I have been a full member of ICMA since 1996 when I began my city management career.

#### Please describe your areas of formal/advanced education.

I received a Bachelor's degree (1985; Political Science) from Alma College and a Master's degree (1990; Public Administration) from Oakland University. While completing my degree at Oakland University, I also received a U.S. Army commission as an infantry officer in 1989.

### Why did you select a career in public service?

I enjoy the different daily challenges of local government- not very many days end the way they started or as planned. The people and the issues are both interesting and challenging (and something unexpected appears frequently).

Have you always been in the public sector or have you had experience in the private sector? While working during my college years, I worked in retail management. Immediately after completing my Master's degree, however, I entered active military service and then transitioned into local government afterward.

#### Please describe your typical day.

I am an early riser, so I review my messages and schedule well before getting to City Hall. I typically have a formal meeting with at least one city commissioner and two or three department directors each day. My immediate staff keeps me focused on routine tasks: reviewing invoices, personnel actions, telephone and email exchanges. I expect my typical day is not much different than most other city managers. Fernandina Beach government offices are not centralized, so I take advantage of opportunities to get out to other locations.

### What is your favorite part of the job?

Introducing people to local government, especially how it operates. With so many varying forms of local government, local government is rarely introduced to students, so most residents are unfamiliar with how everything fits together, especially at budget time.

#### What is your least favorite part of the job?

Contending with the proliferation of misinformation on popular social media platforms.

### Internet – Newspaper Archives Searches Dale L. Martin

(Articles are in reverse chronological order)

### What is your most memorable experience on the job?

Getting hired. This is a very challenging profession and the caliber and capabilities of fellow managers is incredible. To be selected and entrusted with the future of a community is a high calling and we should always remember that trust placed in us by the elected officials and residents.

#### What are your hobbies/interests?

I collect and play board games. I have nearly 700 games in my collection.

## If you could give one piece of advice to people interested in a career in public service, what would it be?

It is a wonderfully challenging and rewarding career. Everything you do, though, plays out in the public arena, so grow a thick skin and an even stronger sense of integrity. Develop a keen sense of political acumen- you may not be a politician, but you most assuredly operate in a political environment.

## Who were your mentors and how have you passed this information down to other aspiring public administrators?

Ironically, due to the relative isolation of most of my communities, I didn't have a manager mentor. My most significant mentors during my early career were the various mayors with whom I worked. They all provided me with insight into the community and the job, letting me grow, make mistakes, learn and lead.

## Do you have a story you can share about how being a member of FCCMA has helped you or impacted you in a positive way?

The FCCMA has enabled me to integrate well into Florida. I know that many other managers like me have transitioned to Florida from other states and it has been interesting to renew acquaintances from previous career locations. It has been helpful to have experienced Florida peers to reach out to as part of the transition.

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## **Section 6**

## Internet – Newspaper Archives Searches Dale L. Martin

(Articles are in reverse chronological order)

https://fernandinaobserver.com/general/city-manager-asks-governor-state-and-federal-officials-for-help/

Fernandina Observer October 3, 2017

### City Manager asks governor, state and federal officials for help

Author: Suanne Z. Thamm

Fernandina Beach City Manager **Dale Martin** and city staff have been working with FEMA officials for many months attempting to get the go-ahead to begin costly repairs to the City Marina due to Hurricane Matthew's damage last year. Despite verbal agreements and cooperation from FEMA officials in developing plans to repair the damage, there has been no formal approval from FEMA not only for planned repairs but to reimburse the city for the cost of debris clean up in the aftermath of the hurricane.

Fernandina Beach is not alone among Northeast Florida communities trying to unblock the flow of approvals and reimbursements from FEMA. Daytona Beach, St. Augustine and Jacksonville have all expressed similar frustrations. Any community that begins repairs without express FEMA approval runs the risk of losing the 75 percent reimbursement. When a small community like Fernandina Beach is looking at several million dollars' worth of repairs, that becomes an unacceptable risk.

At the request of the Fernandina Observer, **Martin** provided the letter below, which he has sent to Florida Governor Rick Scott with copies to: Honorable B. Nelson, United States Senator; Honorable M. Rubio, United States Senator; Honorable J. Rutherford, United States Congressman; Honorable A. Bean, State Senator; Honorable C. Byrd, State Representative; and Mr. Bryan Koon, Director, Florida Division of Emergency Management. **Martin** wrote the letter on September 22, 2017, and to date he has received an acknowledgment from Congressman Rutherford's office.

The letter appears below:

Honorable Rick Scott Governor, State of FloridaThe Capitol 400 S. Monroe Street Tallahassee, FL 32399-0001

Dear Governor Scott:

Thank you for your visible leadership during Hurricane Irma. Although the City of Fernandina Beach incurred minimal damage (especially in relation to other Florida communities), the City has several concerns which require immediate attention.

# Internet – Newspaper Archives Searches Dale L. Martin (Articles are in progress characterists)

(Articles are in reverse chronological order)

The City has yet to receive any reimbursement funding from the Federal Emergency Management Agency (FEMA) or the State of Florida as the result of Hurricane Matthew (October, 2016). Appropriate documents have been submitted to both agencies over six months ago, but no funding has been provided. Most importantly, the City's marina, a key economic facility for the community, remains significantly inoperable due to the lack of federal and state coordination: with repairs estimated at approximately \$6.5 million, the City will not commence replacement of that facility until formal notice is provided by FEMA that the expenditures will be reimbursed. Florida's first maritime facility for traffic from the north has been embarrassingly inoperable for a year: no food, no fuel, no dockage for transient boaters. City officials, businesses, and residents are frustrated with the lack of response following Hurricane Matthew.

The City is now clearing debris from Hurricane Irma. Because of the significant debris throughout several states resulting from both Hurricane Harvey and Hurricane Irma, the availability of personnel and equipment is extremely limited. In order to remain eligible for disaster response funding (albeit with substantial delays for reimbursement, if at all- see previous paragraph), the City will likely have to engage in a lengthy process to pursue and revise debris removal contracts before debris is cleared. The frustration with the federal and state agencies has reached the point that for the interest of community health, safety, and welfare, the City will likely utilize internal resources for debris removal and later pursue an appropriate claim for reimbursement. City officials simply have limited (or even lost) faith in those agencies to provide the support and financial resources following Hurricane Irma when such support and resources following Hurricane Matthew have yet to materialize.

Sincerely,

**Dale L. Martin**City Manager

### Internet – Newspaper Archives Searches Dale L. Martin (Articles are in reverse chronological order)

https://fernandinaobserver.com/general/fbcc-votes-4-1-to-approve-3-percent-pay-raise-for-city-manager/

Fernandina Observer December 7, 2016

### FBCC votes 4-1 to approve 3 percent pay raise for city manager

Author: Suanne Z. Thamm

Fernandina Beach City Commissioners voted 4-1 to approve a 3 percent pay raise for City Manager **Dale L. Martin** following completion of his first year on the job. The FBCC authorized the same pay raise for their other two Charter Officers—City Attorney Tammi Bach and City Clerk Caroline Best—at a previous meeting this fall.

Vice Mayor Len Kreger was the only commissioner not to support the motion made by Commissioner Tim Poynter and seconded by Commissioner John Miller. Kreger acknowledged that during his earlier evaluation he found that **Martin** met all the requirements and exceeded in the area of ethics. However, he felt that he had not seen "sufficient things happening yet based on commission goals" to support an increase at this time. "Don't mistake this for a lack of confidence," he stressed. "And I've discussed this with the City Manager."

Poynter said that he believed that during the past year there had been many opportunities to test the city manager's ability. He credited the city manager's leadership in the city's rapid recovery from Hurricane Matthew. "I think it's appropriate now to send the message that we appreciate what he's done, that he reaches out to the community, something we've sorely lacked in the past, and his Weekly Column that gets sent to the media."

Poynter originally moved a 4 percent raise, but following a question from Commissioner Roy Smith, City Manager **Martin** clarified that the other Charter Officers had received a 3 percent raise. Poynter and Miller amended their motion and second to reflect the lower amount.

Mayor Lentz told **Martin**, "I really appreciate the job you do, and I will be voting in support of this. We still have things to accomplish, but we are getting stuff done. I appreciate you keeping your word about communicating with the community with your Weekly Column. I get so many compliments on that; people really enjoy it."

Before the vote, **Martin** was recognized to speak. "I truly appreciate the support," he said. "Commissioner Kreger and I did have a discussion, and I did not take that as a lack of confidence. From a personal standpoint, this last year has been a wonderfully rewarding experience. You have no idea how effective the five of you can be—the way you treat each other, the way you carry on your dialog ... It's a joy to work with you, with all of the staff, and I look forward to 'getting the things done." The FBCC voted 4-1 to support the 3 percent pay raise.

### Internet – Newspaper Archives Searches Dale L. Martin (Articles are in reverse chronological order)

https://fernandinaobserver.com/general/cancellation-of-beach/

Fernandina Observer May 26, 2016

## Cancellation of Beach BBQ and Bluegrass Festival – "Due to the lack of financial controls . . . "

Author: Susan Steger

City-seal2Due to the lack of financial controls associated with the Beach BBQ and Bluegrass Festival, City Manager **Dale L. Martin** has cancelled the June 10-11 event in Fernandina Beach.

According to the event pamphlet, participants and vendors were instructed to "Make checks payable to Jay Robertson." Since the event was described as a City event, **Martin** believed that checks made to a specific individual, rather than to the City of Fernandina Beach, created the perception of inappropriate accounting. "Mr. Robertson was aware of special event funding issues related to previous events and exhibited exceptionally poor judgement in soliciting checks made to him personally rather than to the City," said **Martin**. "Proper accounting for all City Parks and Recreation special events needs to become more structured and professional. Those activities are subject to review by the City's auditors and our recordkeeping has been poor. I have higher expectations for City staff."

As of Wednesday morning, the Parks and Recreation Department reported that approximately \$1,000 in fees had been received for the event: \$450 from vendors, \$120 for BBQ team entries, and a \$500 sponsorship donation.

The City Commission had scheduled a workshop dedicated to Special Events on June 14, but with the likely absence on that date of Vice Mayor Robin Lentz, **Martin** has indicated that the workshop will be re-scheduled to allow for Lentz' participation.

# Internet – Newspaper Archives Searches Dale L. Martin

(Articles are in reverse chronological order)

https://fernandinaobserver.com/general/fernandina-beach-welcomes-new-city-manager-dale-l-martin/

Fernandina Observer December 2, 2015

### Fernandina Beach welcomes new city manager Dale L. Martin

Author: Suanne Z. Thamm

Before a packed house at the Fernandina Beach City Commission on December 1, 2015, City Clerk Caroline Best administered the ceremonial oath of office to **Dale L. Martin**, the new city manager. **Martin** had been unanimously selected in September to replace city manager Joe Gerrity, who departed the position at the end of FY2014/15.

**Martin**'s first official day on the job was Monday, November 30. On his second day on the job, he attended both the FBCC meeting and a joint FBCC/Ocean Highway and Port Authority (OHPA) meeting.

Martin came to his new position from that of town manager in Winchester, CT, where he oversaw an annual budget of \$33M and a staff of 75 that served a community of 11,000 people. He earned a Masters Degree in Public Administration (MPA) from Oakland University in Rochester, MI. He has nine years of experience as a city manager in addition to four years of military experience with the U.S. Army. He has achieved the status of credentialed manager from the International City and County Managers Association (ICMA). Additionally, Martin has served as a member of the 103-member Presbyterian Disaster Assistance National Response Team since 2010.

Although holiday poinsettia plants blocked the audience view of both commissioners and the new manager, Mayor Ed Boner remarked that City Manager **Martin** had been taking extensive notes during the meeting and jokingly warned him of Florida's public records laws. That did not deter **Martin**, who according to another commissioner, noted all the items that came up during the 3-hour meeting that required his action.

The Fernandina Beach City Hall audience extended a warm welcome to **Martin**, who hopes to settle on his new home in Fernandina Beach soon.

## Internet – Newspaper Archives Searches Dale L. Martin

(Articles are in reverse chronological order)

Republican-American (Waterbury, CT) November 19, 2015

### 'A desperate-looking town' - The people sold town manager on Winsted

Author: Kurt Moffett

Town Manager **Dale L. Martin**'s recalled that first impression of this town was not a positive one. **Martin**, speaking at a farewell reception for him on Wednesday night, recounted how he ended up here in 2011. He said he decided to drive through town on his way to Vermont for a job interview in January of that year. "It was the most ugly, desperate-looking town," he said. **Martin** added that he told his girlfriend, Lisa, the town looked like it was "waiting for someone to throw it a life preserver."

But after he was not offered a job in Vermont, **Martin** received a call from Winsted that he was a semifinalist for the town manager's job here. When he was named a finalist, he said he told the selectmen that he really wanted to interview for similar jobs in Wisconsin and Iowa before he made a decision. He had applied to 113 towns nationwide. **Martin** said Mayor A. Candy Perez called him two days after his interview and said the selectmen were not going to let him make them wait. The selectmen wanted to hire him and he had two days to decide whether to take it.

He said he has never regretted not interviewing in Wisconsin or Iowa. A Michigan native, **Martin** said he loves New England and the people of Winsted convinced him that this was the place to go. "What sold me on the town was when I came back, and I got to talk to the people and got to know them," he said. **Martin**, whose last official day here is Friday, is moving to Fernandina Beach, Fla., where he will start his new job as city manager there on Monday. He said he applied to jobs nationwide, from Maine to Alaska, just as he did in 2010-11.

Charlene LaVoie, the community lawyer employed by the Shafeek Nader Trust for the Community Interest, hosted **Martin**'s reception in place of Ralph Nader, who could not attend. She credited **Martin** with bringing stability to the town manager's office and a higher level of professionalism to town departments. She also praised him for putting an end to the thievery of former longtime Finance Director Henry L. Centrella Jr., who is serving an 11-year prison sentence for stealing more than \$2 million from the town. He did all this despite the selectmen nearly firing him in September 2014, LaVoie added.

The town needs to ignore the naysayers, **Martin** said, and make sure that more residents with a positive outlook speak at public meetings and get involved with town activities and organizations. Too many of them have decided not to get involved because of the intense negativity from a few people, he added. **Martin** said it is bittersweet to leave Winsted because of the friendships he has formed here, but the Florida job is "a wonderful, exciting opportunity." Fernandina Beach has a successful and historic downtown, the coffee and ice cream shops are full of customers at 9 p.m., and it has a working seaport, he noted. "It's definitely an interesting community and I think it'll be a lot of fun," he said.

## **Internet – Newspaper Archives Searches** Dale L. Martin

(Articles are in reverse chronological order)

Republican-American (Waterbury, CT) June 9, 2015

Auditors - will pay - Winsted - \$300,000 - Settlement stems from - Centrella case Author: Kurt Moffett

Blum Shapiro of West Hartford, the town's former auditing firm, has agreed to pay the town \$300,000 in a settlement reached in connection with the embezzlement case of the town's former longtime finance director, Henry L. Centrella. The selectmen authorized Town Manager Dale L. Martin in March to sign the settlement agreement with Blum Shapiro. The town released the details of that settlement Monday.

According to a joint statement from the town and the auditing firm, Blum Shapiro detected irregularities in the town's financial statements in 2011 and 2012 that led to the discovery that Centrella was embezzling town funds. Centrella was convicted in 2014 and subsequently sentenced to 11 years in prison for stealing more than \$2 million in municipal funds.

That same year, without commencing legal action, the town claimed that Blum Shapiro auditors failed to detect Centrella's embezzlement earlier, causing it to sustain monetary damages. Blum Shapiro denied the town's allegations and pointed out that it had been warning the town through management letters that the lack of segregation of duties in the finance office could lead to fraud. The firm also stated that any claim the town may have had was barred by the applicable statute of limitations, which sets time limits on claims. Blum Shapiro also asserted that the town had not fully paid the firm for the 2011 audit and certain forensic accounting services it provided at the town's request in the wake of Centrella's embezzlement.

The settlement was thus made "to avoid a potentially protracted and extremely costly litigation," the settlement release states. The agreement called for Blum Shapiro to pay the town \$300,000, with \$100,000 of that going to an outside firm that represented the town. Martin could not recall the name of the firm. Blum Shapiro also agreed to waive a \$100,000 bill the town owed the firm, Martin said. The \$200,000 goes into the town's reserves, Martin said.

The town is still attempting to sell Centrella's former house at 198 Gilbert Ave. It has been on the market for \$149,000, but Martin said the town will likely have to agree to drop the price.

The town had a civil suit pending against Centrella in Litchfield Superior Court that had sought further reimbursement via his assets. That is now withdrawn. Centrella, however, gave up his former home, his last known significant asset, as well as the \$92,000 he invested in his pension and any sick and compensatory time accumulated in three decades on the Town Hall payroll, as part of his plea deal. The town was looking to recover up to \$7.5 million it believes Centrella stole.

## Internet – Newspaper Archives Searches Dale L. Martin

(Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **Dale L. Martin** is listed below.]

Republican-American (Waterbury, CT) May 11, 2015

### New chief eager to take on challenges

Author: Kurt Moffett

For the town's new police chief, the challenge of transforming a police department is more important than staying in his hometown. William T. Fitzgerald, a lifelong resident of Newport, R.I. who has worked for his city's police department for 31 years, is to be sworn in at 1 p.m. on Thursday at Town Hall. The Winsted Police Department has not had a permanent chief since Robert M. Scannell resigned in October to become Watertown's town manager.

Fitzgerald said Winsted Town Manager **Dale L. Martin**'s positive attitude, despite the numerous obstacles he's faced, was a major factor in his decision to take the job here. **Martin** was nearly fired last summer. "I looked at that and went, 'Wow, that's the kind of guy I want to work for,'" he said.

## **Internet – Newspaper Archives Searches** Dale L. Martin

(Articles are in reverse chronological order)

The Register Citizen March 29, 2015

Owen Canfield: Martin, Carbone dance for charity

Author: Owen Canfield

Last night, in a local version of "Dancing with the (Northwest CT) Stars" at Crystal Peak in Winsted, the most prominent "stars" were Torrington Mayor Elinor Carbone and Winchester Town Manager Dale Martin. "I hope to keep from completely embarrassing myself," Martin said Friday, from his Main Street office in Winsted. "It should be fun," said Carbone from her Main Street office in Torrington.

Because of Saturday night's newspaper deadlines, this column had to be submitted earlier, and I cannot report on the results. But I'll bet it was fun, and I'll bet Martin did not embarrass himself. Jay Cohen of the Winsted YMCA, who was also a contestant, is the guy who proposed the show. It was a fundraiser to benefit YMCA charities. I'm thinking there should be more friendly little jousts like this between neighboring towns. The more interaction, the better.

Two others were scheduled to compete as well: Cathy Coyle, executive director of Brooker Memorial and Sandy Conforti, AVP/Branch Manager of Northwest Community Bank. I don't know if the mayor had the opportunity to practice with her dance partner, Nathan Evans of Hartford Ballrooms, but Martin said he has been brushing up on his rug-cutting with his partner, Amy Wylie of Steps in Time in Canton.

A Michigander, 52, who graduated from Alma College in that state, **Martin** got his masters degree in public administration from Oakland College in suburban Flint. He started in municipal management in 1996. He's been on the job in Winsted for what will be four years on April 11. The town manager says he was not impressed by Winsted when he first saw it. It was winter, and the sand and splashed snow banks along the sides of the street made it appear dingy, rough and ragged. It was Super Bowl weekend. But, having been invited back, his next visit changed his mind. He said he was on his way to Vermont to explore another job opportunity. It was mild and summery and, passing through Winsted, he was charmed by the pleasing ambience. "More than anything, it was the people here that attracted me," he said. "Warm and friendly, and it made me excited to work here."

Winsted people are like that. When there were no funds to erect Christmas decorations on Main Street last year, a group of citizens got together and did the job themselves. "That was indicative of the volunteer spirit of the people in this town," Martin said. Winsted is a little community that can use every victory it achieves. When a former long-time city employee, now in prison, swindled the city out of practically every penny in the treasury, hard work and innovative methods were used to keep the community afloat. The town came through it. Martin's tenure was almost interrupted when five members of the Board of Selectmen voted to oust him because, they said, they wanted "to go in a different direction," according to Martin. Five others voted

# **Section 6**

# Internet – Newspaper Archives Searches Dale L. Martin

(Articles are in reverse chronological order)

with them and he appeared to be finished. "But then there was an election and those five were replaced and our political differences disappeared," he said.

Martin's favorite form of relaxation is – take a guess. Who said, "collecting and playing board games." It's true. Martin said, "I've been doing it for quite a while. I have over six hundred of them. None of these are electronic games, all dice and cardboard. One night a week I get together with some other men and we have soda and snacks and play board games. There are between three and six of us at these meetings. They're from Torrington, Waterbury, Kent and Winsted. They are also collectors but none have as many games as I do." Martin has three daughters and the woman he calls his partner, Lisa Fisher, has two daughters. They live — where else? — in their favorite little town, Winsted.

# Internet – Newspaper Archives Searches Dale L. Martin

(Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **Dale L. Martin** is listed below.]

Republican-American (Waterbury, CT) March 9, 2015

#### **Local News**

Author: Unknown

#### **WINSTED**

Town manager named to serve on regionalization committee

Town Manager **Dale L. Martin** has been appointed to serve on a committee to aid the General Assembly. The committee has been tasked with finding opportunities and regionalizing services that will save municipalities money.

The committee, dubbed the MORE Commission (Municipal Opportunities and Regional Efficiencies), consists of legislators, first selectmen, town managers and other government leaders. **Martin** said he intends to attend the weekly Tuesday morning meetings in Hartford until the end of the legislative session in early June.

# Internet – Newspaper Archives Searches Dale L. Martin

(Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **Dale L. Martin** is listed below.]

Republican-American (Waterbury, CT) March 6, 2015

### Bertnagel mug, Martin mug

Author: Unknown

Winsted

Town rates highly in survey of top places for young families

An online source for information, insight and consumer-driven advice about personal finance has ranked this town as one of the top 10 communities to live in the state for young families.

The website, NerdWallet, ranked Winsted the eighth best place for young families to live. NerdWallet based its rankings on home affordability; prosperity and growth; quality of education; family friendliness; the percentage of families with school-age children and the poverty rate for young children.

Town Manager **Dale L. Martin** said he wasn't very familiar with NerdWallet's methodology, but he feels the town should try to take advantage of that piece of "good news" to better market the town. "It's interesting to see and pleasing to see that an objective, distant agency or entity ranks us so highly," he said.

NerdWallet's top 10 communities in Connecticut for young people are Simsbury, Trumbull, Kensington, Glastonbury, Orange, Wethersfield, Newington, Winsted, Portland and North Haven.

# **Internet – Newspaper Archives Searches** Dale L. Martin

(Articles are in reverse chronological order)

The Citizen Register February 10, 2015

## Winsted's town manager to partake in all six Penguin Plunges in Connecticut Author: Ryan Flynn

Six Connecticut towns, Winsted included, host an annual Penguin Plunge. The rules elsewhere are the same as they are in the Laurel City: participants raise \$100 and then dive into ice-cold water during the winter months, all for a good cause. Last year, Town Manager Dale Martin wore a cheap tuxedo, which he said he bought for \$5 at a Good Will store and a shirt donated from Men's Wearhouse. He took the plunge at Highland Lake, as he will again this year. But this year, he isn't settling for just one dive. Martin will be taking the cold, wet plunge six different times. "I don't think anybody's done it before," Martin said this week.

Martin made the first splash two weeks ago, joining in on Farmington's plunge at Winding Trails. In Farmington, participants run from the beach into the water, rather than diving into a carved hole in the ice as is the case in Winsted. This time around, **Martin** said he'll go with a Tshirt instead of a suit, provided by his unofficial sponsor, Morsel Munk. "They gave me a Tshirt," Martin said. "They wanted to give me a sweatshirt, but I said hell no, I'm going to sink to the bottom with a wet sweatshirt." **Martin** said it's a fun way to get publicity for the Winsted mainstay, which plans to move in March or early April. Morsel Munk pledged some money to support the cause.

All Penguin Plunge donations benefit the Special Olympics Connecticut, helping fund the group's competitions and year-round training. Martin's next cold-water vault will be on Feb. 21 at Crystal Lake in Middletown. Following that, he'll have to dive three times in one weekend twice in one morning alone—when he plunges in Winsted, Madison and New London. Due to the recent snowstorms, these three Penguin Plunges were all rescheduled and happen to fall on one weekend. On March 7, Martin will be participating in both Winsted's annual plunge at Highland Lake and Madison's plunge at Hammonasset State Park. Both begin at noon. Martin said he'll have to jump early in Winsted in order to make both events. "I'm going to have to register at 10, jump in at 10:30, change, get in my car, drive to Madison and then jump in down there," Martin said. The next day, he'll dive again in New London. The sixth and final Connecticut plunge is March 14 at Compo Beach in Westport.

According to Sharon Pelkey, the director of special events for Special Olympics Connecticut, rescheduling three of the six plunges came down to safety. With road cleanup occurring and a possibility of frigid, minus-degree temperatures, the Special Olympics Connecticut staff decided that holding the event could be a risk to divers and bystanders. "We just really thought it was in the best interest to push it off," she said. Pelkey said she had not heard of anyone ever doing all six plunges before. "It's kind of a challenging thing to do because there are three in one weekend," she said. "I would probably say try to plan ahead accordingly and bring lots of dry and warm clothes."

# **Section 6**

# **Internet – Newspaper Archives Searches** Dale L. Martin

(Articles are in reverse chronological order)

On March 7 in Winsted, registration starts at 10 a.m. and the plunge is at noon. Participants need to raise a minimum of \$100 to take part. In addition to the awards for top fundraisers and best costumes, participants can receive incentive prizes for their fundraising efforts. "It's just a great organization," Martin said. "I've got the time and the ability to help support them so I'm going to do it."

Participants can register for the plunge at www.soct.org. For more information, call 203-230-1201 or email specialolympicsct@soct.org.

# Internet – Newspaper Archives Searches Dale L. Martin

(Articles are in reverse chronological order)

Republican-American (Waterbury, CT) January 30, 2015

### Workshop held on plan for Winsted's future

Author: Kurt Moffett

The Board of Selectmen on Thursday night held its first workshop for developing a strategic vision for the short-term and long-term plans of the town. With Town Manager **Dale L. Martin** guiding the discussion, selectmen for two-and-a-half hours talked about the town's strengths and weaknesses, and what they think its priorities should be.

Selectmen said economic development is key to growing the tax base and thus increasing the revenue needed to fund badly needed infrastructure improvements. The question is: how to get there? There was general consensus that the town likely would benefit from hiring a planner, a consultant from a regional agency or a private contractor. "If you bring someone in and they have some success, then that's when the community begins to see the leadership, the vision and professionalism," Selectman Glenn S. Albanesius said. Albanesius said the town's struggles primarily are due to a lack of leadership and vision. He cited the Gilbert School as a place where there has been good leadership and how the move to bring the seventh- and eighth-grades there in 2011 has proved to be successful. Selectman Steven A. Sedlack, who chairs the Gilbert School Corp., largely agreed with Albanesius but added that town boards need to let the "leaders lead." Albanesius expressed concern that if the town does bring in an economic development consultant who wants to make changes, there will be resistance from those who don't want change.

Martin said he does not think there will be much resistance. He said the key is unity from the selectmen. "If you have consensus, they will follow your lead," Martin said, adding the same is true for town employees. If they see rancor and division, they will "hunker down" and continue operating as they always have. But he said he thinks town employees are beginning to see some stability with the current board and are "very open and receptive" to change.

**Martin** noted, however, that some veteran employees still are adjusting to life without former longtime Finance Director Henry L. Centrella, who is serving 11 years in prison for stealing more than \$2 million from the town. His successors over the past two years have changed policies and procedures to make sure there are checks and balances on financial transactions.

**Martin** said another key factor is staff turnover. The town has had several personnel changes in key positions, from the finance director to public works chief to the head of recreation. It takes time for them to get situated before they can pick up where their predecessors left off and implement changes that will benefit the town.

Mayor Candace Bouchard said the town needs policies that will direct how town leaders invest taxpayer dollars. Selectman A. Candy Perez said the town not only needs goals, but also an understanding of the steps required to meet those objectives.

# Internet – Newspaper Archives Searches Dale L. Martin

(Articles are in reverse chronological order)

Republican-American (Waterbury, CT) December 22, 2014

### **Local News**

Author: Kurt Moffett

#### winsted

Even putting up decorations can generate acrimony aplenty

Winsted Town Manager **Dale L. Martin** was feeling some heat again last week. **Martin** was criticized for saying that the town was not decorating downtown Main Street for Christmas because the decorations the town had were in poor condition and did not set aside money in the budget to replace them and/or put them up. Volunteers, however, did find the decorations that were used last year and put them up themselves on Dec. 13. Some of the decorations were not the town's so-to-speak - the lights were purchased by the Economic Development Commission and were intended to be up year-round on the trees along the Main Street median and the red bows were purchased by the Friends of Main Street.

Stephen Kosinski, who rarely attends a selectmen meeting without commenting, said the volunteers "showed who has true colors and heart for the town and who doesn't." He called **Martin** a procrastinator and said he has no faith in his ability to help the town spark badly needed economic growth. Later in the meeting, he asked the selectmen to draft a proclamation of no confidence in **Martin**. He said he would start a petition if necessary. Kosinski, who calls himself captain for his military service, yelled at **Martin** at one point because he was looking down while he was writing. "**Dale**, look at me!" he said. "Put your eyes on me and look me in the eye!" Mayor Candace Bouchard interjected and told Kosinski to stop.

Earlier in the meeting, **Martin** thanked the volunteers and David G. LaPointe, specifically, for organizing them to put up the decorations. He also thanked the 40 people who participated and donated toward the YMCA's "Freezin' for a Reason" at East End Park on Dec. 12. **Martin** was one of those who stayed in the park overnight to raise awareness about homelessness. **Martin** also thanked those who donated toward the police department's "Stuff a Cruiser" toy drive. He said Sgt. Kevin Kinahan, who is serving as interim chief, told him that the equivalent of three cruisers were filled with toys and gifts for needy children. "I think the weekend brought the best out of the town of Winchester, especially the people," he said. "We get a bad rap a lot of times but the town's really about the people and I think people stepped up over the weekend. It should be a good Christmas."

Martin, who was hired in March 2011, was suspended for 30 days with pay over the summer by the Republican majority on the selectmen, primarily because of his dealings with a felon who was involved in a failed purchase of the former Lambert Kay pet supply factory, which the town owns. He survived possible termination when a Democratic candidate took one of the Republicans' seats in a special election on Sept. 13. At least five selectmen need to support termination. After the special election, the Republicans had only four members on the board. The Democrats support Martin.

# Internet – Newspaper Archives Searches Dale L. Martin

(Articles are in reverse chronological order)

Republican-American (Waterbury, CT) October 10, 2014

### Police officer sues town to get former rank back

Author/Byline: Kurt Moffett

WINSTED - A 20-year veteran police officer wants to be reinstated as a sergeant, according to a lawsuit he has filed against the town, the town manager and the former police chief. Patrolman Christopher Skinner claims that former Police Chief Robert M. Scannell, who starts his new job as Watertown's town manager on Tuesday, has effectively reduced his chances of a promotion by failing to evaluate him in the process of assigning shift supervisors.

In the lawsuit, filed in Litchfield Superior Court, Skinner said that when a shift lacks an available sergeant and is comprised only of patrol officers, the chief selects one of the officers as the supervisor, known as the officer-in-charge, or OIC. An agreement reached between the police union and the town in 2008 calls for the chief to consider the officer's performance and skills based on the feedback and comments of the officer's previous supervisor or sergeant, and the deputy chief; the chief's own observations and any disciplinary actions the officer received during the previous 12 months. The OIC "earns a higher rate of pay than the other patrol officers, gains experience in a supervisory role and creates a record of his or her supervisory capabilities," Skinner states in his suit.

Currently, the department has only one officer with a rank, Sgt. Kevin Kinahan, who is now the acting chief. There are 15 patrolmen. The department should have three patrol sergeants, one per eight-hour shift. Kinahan is not a patrol sergeant. Town Manager **Dale L. Martin** told selectmen this week that the Civil Service Commission intends to hire a firm to give a sergeant's exam to those who apply for the promotions.

Skinner was a sergeant for five years before former Chief Nicholas A. Guerriero demoted him in September 2010. The demotion stemmed from an internal investigation into the misappropriation of police union funds. The investigation focused largely on the late Philip "P.J." Bialoglowy, the former police union president who committed suicide seven months before that. Skinner, who was the union treasurer, was one of three officers who knew Bialoglowy had withdrawn funds from the union account for personal use.

Skinner states in his suit that as treasurer he authorized a check for \$500 that Bialoglowy had made payable to himself. Bialoglowy explained to Skinner, Sgt. Thomas Kenney, now retired, and Officer Michael Roy, now union president, that he was behind on his mortgage and intended to replace the funds. The \$500 was replaced a few days later. Skinner states that he, Kenney and Roy did not report the incident because they considered what had transpired a union matter and they were satisfied that the funds had been replenished. Roy has said they were unaware that Bialoglowy had actually written himself four checks totaling \$2,950 and had repaid just \$450, leaving the account with only \$200 at the time Bialoglowy died.

## Internet – Newspaper Archives Searches Dale L. Martin (Articles are in reverse chronological order)

Guerriero agreed with Skinner that the check incident was a union matter, Skinner's suit states. But after a resident complained to then-Town Manager Wayne W. Dove that no action had been taken, Guerriero contacted state police and the state's attorney's office. He did this "without asking union membership whether it wished to file a complaint and publicly discredit (Bialoglowy) when the matter already had been resolved...," Skinner states.

Guerriero, who officially retired two days after he demoted Skinner, has said the findings from the internal investigation cleared him of knowing about the withdrawal from the union account until he received the complaint from Dove. He said Bialoglowy would have been subject to arrest if the union had reported the missing money to state police, but it was a breach of department policy not to report it. Bialoglowy died the day state police had planned to interview him about the missing funds. He was 39 and a 13-year veteran of the force.

Guerriero assigned Scannell, who was then deputy chief, to conduct the internal investigation. According to Skinner's suit, Scannell found that Skinner, Roy and Kenney had violated department rules and recommended one-day suspensions for each. He also recommended demoting Skinner. The police union filed a grievance against Skinner's demotion that was denied by Scannell and Dove. The union subsequently filed for arbitration with the state Board of Mediation and Arbitration.

The union, Skinner and the town agreed to a settlement on July 31, 2012, whereby Skinner remains a patrolman but at a sergeant's salary. Skinner's annual base salary under the recently approved police contract was not available, but under the previous contract it was \$61,617. Skinner in his suit states that the settlement agreement did not preclude him from taking any promotional exams and purged his disciplinary record for his actions related to Bialoglowy from his personnel file. He stated he has sought the OIC assignment numerous times, but Scannell never chose him for the position. Skinner stated that he feels Scannell was still penalizing him for his actions regarding Bialoglowy. Scannell could not be reached for comment Thursday.

Skinner subsequently complained to **Martin**, the town manager, in April. **Martin** wrote back that the chief has sole discretion over who is assigned as an OIC. Skinner states that **Martin** abdicated his responsibility by not enforcing the OIC assignment selection criteria. **Martin** declined to comment Thursday.

#### b.

# Internet – Newspaper Archives Searches Dale L. Martin

(Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **Dale L. Martin** is listed below.]

The Register Citizen September 15, 2014

Suspended Winsted town manager reinstated Selectmen vote to end Martin's suspension following special election

Author: Ryan Flynn

Suspended Town Manager **Dale Martin** has been reinstated, effective Friday. No longer controlling enough votes to fire **Martin** later this week, the Republicans on the board have conceded the fact that **Martin** will remain the chief official in town. His public hearing, originally scheduled for Thursday night, has been cancelled. Selectman Candace Bouchard made the motion to reinstate **Martin**. When asked after the meeting if she still thinks **Martin** deserves to be fired, Bouchard didn't mince words. "Of course," she said. It requires five affirmative votes to oust a town manager, which the Republicans no longer have after the split ticket results of Saturday's special election for two selectmen seats. The Democrats have supported **Martin** throughout the process. "We would still vote five if there were five," Bouchard said.

#### b.

# Internet – Newspaper Archives Searches Dale L. Martin

(Articles are in reverse chronological order)

The Republican-American September 11, 2014

### As Winsted's town manager, Dale Martin has performed admirably

I would like to offer another view of Town Manager **Dale L. Martin** in response to recent letters from people who wish to see him fired. As a selectman, it has been my privilege to witness **Mr. Martin** at a variety of events and venues throughout his tenure. While some town managers simply attend the required board meetings, **Dale** has gone above and beyond. Let me outline just a few examples to provide a sense of how much he cares about our community. He has supported community events multiple times: freezing multiple times in the Special Olympics' Penguin Plunge; sleeping overnight in East End Park to raise money for the YMCA shelter; and spending sleepless nights providing shelter at the senior center after a horrific ice storm. **Dale** has been a positive ambassador at local and regional functions, such as United Way fundraisers. He often can be seen at Whiting Mills events, American Mural project events and town parades.

I have watched him remain patient with every selectman, no matter the person or party. When others would have gone behind closed doors, **Dale** wanted the doors open. When additional work was added to his plate, such as becoming the town planner, he took on these tasks willingly and never asked for a raise. **Mr**. **Martin** believes in this town in more ways than most people who have lived here for their entire lives.

True to form, the campaign of Republican Mayor Marsha M. Sterling and Selectman Glenn S. Albanesius, also a Republican, has been providing part of the information while omitting the rest of what he has done well. Yes, **Dale Martin** was fired from his last job in Davison, Mich. However, "Just two days after the City Council voted to put City Manager **Dale Martin** on paid leave with intent to fire him, petition signatures were filed in the Genesee County Clerk's office to recall five councilmen, including the four who voted for **Martin**'s dismissal," The Flint Journal reported July 28, 2010. The result: "The City of Davison votes to recall four of five city council members" (Nov. 3, 2010, minbcnews.com).

Everyone deserves a fair shake. For **Dale Martin** to have one, I ask that you vote for Democrats Virginia Shultz-Charette and Steve Sedlack in the special election for selectmen Saturday.

A. Candy Perez Winsted

The writer is a Democratic member of the Board of Selectmen.

## Internet – Newspaper Archives Searches Dale L. Martin (Articles are in reverse chronological order)

The Register Citizen September 5, 2014

### Suspended Winsted town manager defends himself in letter

Author: Ryan Flynn

Line by line, point by point, suspended Town Manager **Dale Martin** attempted to debunk the resolution that could cost him his job. **Martin** submitted an eight-page rebuttal to Town Attorney Kevin Nelligan Thursday in response to the resolution selectmen drafted Aug. 14, the night he was suspended with intent to fire. Many of these points will likely be expressed during **Martin**'s public hearing on Sept. 18. Just five days after his suspension, **Martin** requested the hearing at 7 p.m. at Town Hall.

In his letter, **Martin** responded to each of the allegations brought against him. **Martin** started by rejecting the notion that he hasn't been transparent with the board, dating back to when Lisa Smith was mayor. "The opportunity for collaborative and transparent dialogue has long been available, but not utilized by many of the current Board of Selectmen," **Martin** wrote. In the resolution, drafted by Republicans on the Board of Selectmen, it is mentioned that the board lost confidence in **Martin**'s ability "to lead the recovery from a period of failed oversight."

Martin responded stating that the town's recovery from the actions of former finance director Henry Centrella, who pleaded guilty earlier this year to stealing more than \$2 million from the town, has been "substantial in the nearly two years since his suspension, termination, arrest, and conviction." "The Town staff remained focused and dedicated to continue the investigative effort in spite of the open attacks and whispered doubts," wrote Martin.

Martin went on to list several economic development projects including the new Dunkin Donuts on Main Street, the restaurant which will take over the former Blimpie site and two abandoned downtown mills that are approved for redevelopment. Much of the resolution was centered around Martin's failed dealings with XS4D, the Arizona-based gaming chair company Martin had negotiated a deal with to sell the blighted, abandoned Lambert Kay property to. The deal eventually fell through, with the middleman brokering the deal revealed to be David Viens, a scam artist from Arizona who had previously spent two years in prison. Martin broke down his own timeline of the events. He wrote that he began speaking to Viens on behalf of XS4D in 2013. Viens had previously served the same middleman role in the purchase of Laurel Hills, an elderly care site. Their discussions were confidential, "as with most significant economic development projects." At the same time, Martin and the selectmen had begun to pursue grant funding for the site.

In March, **Martin** and various town officials met with representatives for XS4D: David Cusick, a local attorney, and Robert Simmons of HRP Associates. A nondisclosure statement was signed that night by all parties, **Martin** wrote. Shortly thereafter, the town applied for the Small Town Economic Assistance Program (STEAP) grant that it would later receive. In April, the rash of resignations began with selectmen Smith and Robert Vogt. "After Mayor Smith's unexpected

# Internet – Newspaper Archives Searches Dale L. Martin (Articles are in progress charges desired and an

(Articles are in reverse chronological order)

resignation, both Mayor Sterling and Selectman [Glenn] Albanesius were provided a summary of the XS4D plan in early April." **Martin** wrote that in late April or early May he found out about Viens' background. "Nonetheless, [Viens] had successfully led the effort of another entity to acquire other property in Town, as well as in other areas throughout the northeastern United States, and given the lackluster redevelopment efforts of Lambert Kay over the past 20 years, I believed that the XS4D proposal represented a significant opportunity for the Town," he wrote.

From here, two proposals for the site were received. **Martin** wrote that "no STEAP funds were going to be provided to the developer," and that control of those funds would remain with the town. He also wrote that he scheduled the town meeting for citizens to hear the proposal on July 21 — while he'd be on vacation — because having it during a regularly scheduled meeting would "encourage greater attendance." "The sale had to be presented to a special Town Meeting between 30 and 45 days forward. The only regularly scheduled Board of Selectmen meeting in that window fell upon July 21, during a vacation scheduled months ago," he wrote.

Martin wrote that he doesn't know how or why Viens and Sterling got in touch the day of the meeting, but blames this conversation for the "confusion" and subsequent meeting postponement. "No Town funds were to be directly dispersed to either Mr. Viens or any XS4D officials: the STEAP funds were to be spent by the Town at its direction," Martin wrote. "The Town Attorney was confident that the Town was adequately protected from financial harm." Martin ended the letter by again extending his offer to meet with any selectmen or citizens at their convenience. "I look forward to continuing to serve the Town and residents of Winchester," Martin wrote, later stating that he will "continue to provide professional guidance to Winchester, irrespective of partisanship and personalities."

The Board of Selectmen is currently a 5-2 Republican supermajority. Via the charter, it takes five votes to remove a town manager, which means the Sept. 13 special election to determine who will hold Sterling and Albanesius' seats will likely determine whether **Martin** keeps his job. **Martin**'s response can be seen in its entirety at RegisterCitizen.com.

# Internet – Newspaper Archives Searches Dale L. Martin

(Articles are in reverse chronological order)

Republican-American (Waterbury, CT) August 16, 2014

Winsted sued over pension Suspended manager ended police plan

Author: Kurt Moffett

Two retired Winsted police officers are suing the town and embattled Town Manager **Dale L.**Martin for ending a police retirement benefit plan at the end of last year. Timothy J. O'Connor, who retired in 2012 after 26 years on the job, and Robert W. Davidson, who retired in 2006 after 26 years, filed their lawsuit in Litchfield Superior Court on Wednesday. Martin, who was suspended from his job by the selectmen on Thursday, ended the retirement plan because the costs to cover the retired officers exceeded the amount of money current officers were paying into it and the town could no longer afford to cover the difference.

The selectmen voted 5-2 along party lines to suspend **Martin** with pay with the intention of firing him next month. A hearing where **Martin** can defend his case is set for Sept. 18. While the retirement plan was not listed as a reason for firing **Martin**, Republican selectmen have said they have lost confidence in him, particularly after the failed deal to sell the former Lambert Kay pet supply factory to an Arizona-based entertainment company. In a letter **Martin** sent to retired officers in late October, he cited language in the contract between the police union and the town which states, "In the event no funds are available, no benefits shall be paid."

FORMER FINANCE DIRECTOR Robin L. Manuele, who resigned in April to return to her former job as assistant comptroller for the city of Bristol, said at the time that the deficit for the retirement fund in 2012-13 was \$131,237 and in 2011-12 was \$99,195. The benefit plan was established in 1989. The latest collective bargaining agreement between the town and the police union, effective Dec. 29, 2008, called for the town to contribute \$5 per officer per week and each officer matched that with another \$5. In addition, another \$10 per hour surcharge was added to all outside details, except for town-funded jobs. Officers who retired in good standing were eligible for health benefits.

Manuele said in November that there were nine officers receiving benefits. In 2012-13, the cost of medical premiums were \$159,032, yet the income generated from officers and the town netted just \$7,795, a difference of \$131,237. The town had been covering the difference, but with the town's financial difficulties, it could not do that any longer, Manuele and **Martin** said. The town has had very little money in reserve and has no credit rating, restricting it from borrowing. Town officials largely have blamed the town's financial problems on its former longtime finance director, Henry L. Centrella, who is serving an 11-year prison sentence for stealing more than \$2 million from the town.

**Martin** has said Centrella's thefts had nothing to do with the inadequate funding of the retirement plan. But as finance director, he said Centrella was the trustee of the plan and "he did not do his job" of keeping the town informed of the fund's insolvency.

# Internet – Newspaper Archives Searches Dale L. Martin

(Articles are in reverse chronological order)

ACCORDING TO THE LAWSUIT, O'Connor made "semiannual \$520 payments" to the fund and Davidson, "semiannual \$500 payments." The suit says both men have received benefits from the fund but not how much. O'Connor and Davidson claim in the suit that Police Union President Michael Roy received a bank statement from Centrella in November 2012 that showed the fund had a balance of \$103,000. Roy, Centrella and union Vice President Scott Trombly subsequently met with the town's insurance agency, Litchfield Insurance, to discuss ways of keeping the fund solvent.

Centrella, however, was first placed on administrative leave that month and then fired two months later. Roy then approached **Martin**, who said the town owed the fund \$96,000 because the day after Centrella showed Roy the bank statement, Centrella transferred \$96,000 from the fund to the town's reserves, according to the suit. O'Connor and Davidson state in the suit that the retirement fund had a balance of \$18,717 as of February. They claim **Martin** and the town have breached the collective bargaining agreement between the town and the police union, as well as their fiduciary duty by not paying the officers' benefits. They are asking the court for a temporary injunction to compel the town to immediately compensate their health care providers for their expenses and costs incurred since Dec. 31, 2013, and a permanent injunction to resume their benefits.

Martin said Friday he did not know whether the fund had a balance of \$18,717. Brenda Fox-Howard, the town's new finance director, was not in on Friday. Roy has said there are officers on the plan who retired in the early 1990s and did not contribute that much, yet are on a family plan that costs \$20,000 per year. He said the plan was intended for the officer, not the entire family, and was supposed to be a bridge to Medicare, a federal program that provides health care coverage to seniors 65 and up. Many officers retire before age 65. Roy and Martin have said they were working on a solution to the underfunded retirement plan during negotiations on a new police contract. The selectmen last week approved a new contract. The union has not yet voted on it. So details of what it contains have not yet been made public.

## Internet – Newspaper Archives Searches Dale L. Martin (Articles are in reverse chronological order)

The Register Citizen August 14, 2014

Winsted Town Manager suspended, selectmen intend to fire him in 30 days Special election likely to decide whether selectmen will fire Dale Martin in 30 days Author: Ryan Flynn

Dale Martin has been here before. He was suspended and later fired in 2010 in Davison, Michigan, where he served as city manager. Four years later, in Winsted, another town board is coming for his job. In a 5-2 vote Thursday night, the Board of Selectmen moved to suspend Martin for one month with the intent to fire him in September. However, in a way, it will be the people of Winsted who decide whether or not Martin is fired. All signs point to the vote to fire Martin occurring after the Sept. 13 special election, where two Board of Selectmen seats are up for grabs. It takes five affirmative votes to fire a town manager, so if either Mayor Marsha Sterling or Glenn Albanesius were to lose their seats, the Republicans would no longer have enough votes to oust Martin without help from the Democrats — help which isn't coming. Democrats Candy Perez and George Closson have both said that they support Martin and that more turnover of the town manager's would hurt the town. Steve Sedlack and Virginia Charette, the Democratic challengers for those two seats, also support Martin.

A resolution giving notice of the board's intention to fire **Martin** was presented Thursday night. Perez said she and Closson had not been given the resolution prior to the meeting. "The Board of Selectmen has lost confidence in the ability of the Town Manager to perform his duties as Town Manager," the resolution reads, "to lead recovery from a period of failed oversight, to credibly foster economic development or maintain a collaborative and transparent dialogue with the Board of Selectmen." Selectman Daniel Langer, a Republican, called **Martin** "an anchor" impeding the town from moving forward. Selectman Jorge Pimentel echoed the sentiment. "My feeling is that we need a new leader in this town," Pimentel said.

Throughout the evening, a raucous crowd interrupted and spoke over Sterling. Many brought signs into the Pearson School Gym that read "Abuse of power" "Marsha must go" and "unseat the bullies." Martin, like the Democrats, also said he had not seen the resolution prior to the meeting. He said he requested the resolution by email on Thursday afternoon so that he could "prepare an appropriate response." "I never got a response from anyone," Martin said. Martin is suspended from "all town functions and duties," he said, and has been instructed by counsel not to answer his phone or emails as they relate to town business. Ross Herzog, the assistant tax collector at town hall, will serve as acting town manager in Martin's absence. "Ross will have a steep learning curve, but I wish him well," Martin said.

If **Martin** requests a public hearing, which he said Thursday night he has every intention of doing, it will be held on Sept. 18, just five days after the special election. **Martin** has come under fire because of the town's recent dealings with David Viens, who served as the middleman in the bid to sell the blighted Lambert Kay property to high-end gaming chair company XS4D Entertainment LLC, based in Arizona. It was revealed in July that Viens is a convicted scam

## Internet – Newspaper Archives Searches Dale L. Martin (Articles are in reverse chronological order)

artist who was sentenced to two years in federal prison in the 1980s for conspiracy to commit wire fraud.

In their resolution to suspend **Martin**, selectmen referred to the Lambert Kay negotiations several times, including that he "failed to present key terms of the sale of Lambert Kay as negotiated by him including buyers [sic] requirement for \$500,000 in grant funding..." "[Martin has] failed to exercise proper judgment and recognition of the town's best interests on the suitability of the parties he negotiated with over nine months and recommended for acceptance in the potential sale of Lambert Kay (parties whose financial resources, manufacturing experience and ability to complete the project were unknown and un-diligenced by him)," the resolution reads.

Selectmen also wrote that **Martin** failed to disclose "the existence of up to \$2.4 million in unpaid bills," structured a funding plan that failed to "provide adequate funding for the Board of Education culminating in an adverse 10 4-b finding against the Town of Winchester," failed to complete an annual report for the town over two consecutive years and that he failed to both attend "critical town meetings" and appoint an "appropriate replacement" when out of town for extended periods of time.

This is **Martin**'s fourth stop in his career managing a municipality. According to various Michigan reports and **Martin**'s LinkedIn page, he worked as the city manager in Linden, Michigan for eight years, starting in 1998. In March 2007 he took the job as city manager of Dowagiac, Michigan. He remained there a mere seven months, quitting because of "a difference in philosophy about openness in government," according to the Flint Journal. In April 2008, **Martin** became the city manager for Davison, Michigan. There, he clashed with the city council and was fired after two years and five months with the city.

In July 2010, the Flint Journal reported the following: "Some council members had accused **Martin**, who was hired from the city of Linden in 2008, of lying to them, providing coy answers, being disrespectful and being more interested in promoting his personal professional resume than serving the city of Davison." **Martin** reflected on his time in Davison in Sept. 2010, mentioning that during his tenure he tried "to bring some sanity and stability to city government." This via the Davison Index. It is expected that **Martin** will request a public hearing in the next few days. The full resolution, as presented Thursday night, is available on RegisterCitizen.com

# **Internet – Newspaper Archives Searches** Dale L. Martin

(Articles are in reverse chronological order)

The Register Citizen August 1, 2014

### Winsted to 'move on' from failed Lambert Kay deal

Author: Register Citizen Staff

Town Manager Dale Martin said Friday that the town will move on from a failed deal to sell the Lambert Kay property and restart the process of looking for a potential buyer. A day after it was revealed that the potential deal to sell the property to video game chair manufacturer XS4D was brokered by David Come Viens, an Arizona scam artist and convicted felon, Martin said he fully supported a decision to halt all town business with the company.

Viens served two years in federal prison in the 1980s for conspiracy to commit wire fraud. In 2011, he was ordered to pay back more than \$2 million to investors for defrauding them in deals involving nursing home developments in Arizona. "The bottom line is, the deal was appropriately terminated and we're moving on," said Martin. "We don't need to look back." The Board of Selectmen voted unanimously during a special meeting Thursday to recommend that Martin and Town Attorney Kevin Nelligan acknowledge the withdrawal and cease all discussions with XS4D and any of its affiliates. Martin, who was absent from Thursday's meeting, had been in negotiations with XS4D Entertainment Holding Company, an Arizonabased LLC that planned to manufacture high-end gaming chairs at the 32 Lake St. site, since fall 2013. The company, managed by Yvonne Martin and Brook Douglas, made a bid of \$15,000 to buy 1.65 acres of the blighted, contaminated brownfield.

The offer from XS4D was pulled off the table last week by Viens, who Martin dealt with throughout the negotiating process. Mayor Marsha Sterling said Martin had been aware of Viens' past misdeeds but did not alert her or Nelligan. Martin said Friday that he had learned about Viens' past "a few months ago," and that the information hadn't swayed him from negotiations since Viens was "only the go-between" and his name wasn't on any of the paperwork submitted expressing interest in the site. As of Wednesday, Martin had said he was still working to get the deal with XS4D back on the table. "Based upon discussions with the mayor and the town attorney, the decision was to move on," **Martin** said Friday. "I fully support that decision."

When asked why he would not be apprehensive dealing with a convicted felon Martin said that safeguards would have been in place if the deal had proceeded so that there would have been no negative financial impact to the town. Martin said he couldn't provide details on what the exact safeguards would have been since the deal "never got that far." "It's moot at this point. We're not going forward with it, so we move on," said Martin. He said the town is always cautious in its business dealings and the same applied to the Lambert Kay negotiations. "If I thought that the town was at risk, then I would take appropriate steps," said Martin.

Just days after Gov. Dannel P. Malloy visited the Lambert Kay site to announce a \$500,000 state Small Town Economic Assistance Program grant for Winsted, a town meeting was held July 21,

# Internet – Newspaper Archives Searches Dale L. Martin

(Articles are in reverse chronological order)

while **Martin** was on vacation, at which townspeople were expected to vote to approve or deny the property's sale. Sterling was contacted that day by a man who went solely by the name "David" and described himself as a "hedge fund manager, serving as a consultant for XS4D." Viens gave Sterling several terms the town would have to meet for representatives of XS4D to attend the town meeting: First, "that no questions be asked or disclosure sought as to the purchaser, their business plan, their product, their financial resources or their experience and ability to undertake the project." Second, David wanted a receipt from Sterling assuring the deal would be approved at the town meeting; and third, that the town contribute the entire STEAP grant — \$500,000 — to the transaction without disclosing this at the town meeting. This had been "explicitly agreed" upon with the town manager already, according to Viens.

When Sterling did not agree to the terms, Viens requested the town meeting be postponed and later sent a message saying XS4D had abandoned their interest in Lambert Kay and moved on to another site, while at the same time criticizing the mayor for her "disrespect" in asking questions about the deal and plans for the property. The Register Citizen contacted Viens, using a number listed in his email conversations with the town, late last week. He responded to the name David Viens initially, but when asked directly, he refused to divulge his identity or where he was from, other than that he currently lives in New York. "I'm not representing [XS4D]," he said. "I'm just a friend of theirs. I'm not a paid employee; I'm just doing some diligence for him."

Viens said that he had "no role" in the XS4D deal and would not clarify in what way he acted as a third party. He mentioned that the company and all those involved had "confidentiality agreements" and that large deals like this occasionally operate in what he called "stealth mode." Sterling said after the meeting Thursday that she had no comment as to whether she thought Viens had planned to scam the town of Winsted.

As for the next plan for the Lambert Kay property, **Martin** said the town would work to utilize the STEAP grant money to clean up the site and revisit its sale at a later time. **Martin** was asked if a person's criminal history would impact potential deals with the town. "I don't think it would be appropriate for me to request a criminal background check on anybody who submits a site plan application," said **Martin**.

# Internet – Newspaper Archives Searches Dale L. Martin

(Articles are in reverse chronological order)

Republican-American (Waterbury, CT) December 23, 2013

## Pot outlet not wholly dead Winsted town manager asks state to keep proposal active

Author: Kurt Moffett

A proposed medical marijuana dispensary that was rejected by the Planning and Zoning Commission may have a second chance at coming to town. Town Manager **Dale** M. **Martin** sent a letter to the state Department of Consumer Protection last week that asks the state to not take the proposal out of consideration so that the PZC can have the time to revise its regulations and reconsider the proposal.

The PZC voted unanimously on Dec. 9 to reject the proposal because its zoning regulations do not specifically address medical marijuana, particularly under the definitions of "retail sales" and "drugs." The commission subsequently asked **Martin**, who also serves as the town planner, to begin crafting regulations that will address medical marijuana dispensaries. Local approval is a prerequisite of state approval. James Dietz, the applicant, has expressed concern that the state is only going to issue one license for each county, possibly as early as January. The state passed a law last year that authorized the medical use of marijuana.

Martin notes in his letter that most of the public comments heard by the PZC supported the proposal. Even commission members themselves expressed support for the proposal in concept. "I believe that, under the stringent and innovative controls and conditions established by the state of Connecticut to regulate medical marijuana dispensaries (and cultivation), the site proposed by Mr. James Dietz and the Nutmeg State Health and Wellness Center is a reasonable and viable use of the property (which has been abandoned and in disrepair for nearly seven years)," Martin wrote. Dietz, president of Nutmeg State Health, had proposed opening the dispensary at the former Kentucky Fried Chicken on Route 44. Dietz, of Barkhamsted, and his business partner, Daniel Vaughan of Torrington, have said they like the location of the former KFC because it is off of a main road near Ledgebrook Plaza and easily accessible, yet isolated and private.

PZC members disagreed with Nutmeg's interpretation that the dispensary would fit regulations that govern pharmacies. They ruled the dispensary, though an operation to sell a specific type of drug to customers, is not a pharmacy because it does not fit the model of existing pharmacies. They also declined to develop regulations that fit Nutmeg's business model because to do that for one specific property would be setting a poor precedent. **Martin** asked that if state officials deem Nutmeg's application "worthy," then could they grant a conditional approval not to exceed 90 days. In the meantime, **Martin** said he will present revised regulations to the commission members and once they are approved, the commission can formally reconsider the proposal. **Martin** sent his letter to Peter Krzykowski, a health program assistant with the Department of Consumer Protection. He said he had not heard from any state official as of Friday. Neither Krzyowski nor department spokesman Claudette Car-veth returned messages from a reporter late last week.

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# Internet – Newspaper Archives Searches Dale L. Martin

(Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **Dale L. Martin** is listed below.]

Republican-American (Waterbury, CT) January 27, 2014

#### **Local News**

Author: Kurt Moffett

winsted

'The person you knew never existed and he left a mess ...'

There was an array of reactions to former Winsted Finance Director Henry J. Centrella Jr. pleading guilty on Friday to charges that he stole more than \$2 million from his hometown.

Selectman A. Candy Perez said she credits Nelligan and Town Manager **Dale L. Martin** for "staying the course" and sticking to a strategy that, as the investigation unfolded, revealed just enough information to keep the public informed but not damage the investigation, even when people were clamoring for more. "There's a lot of stuff I'm sure I still don't know," she said.

A year ago, **Martin** was on the hot seat as the town's financial troubles began to emerge. One former selectman, Kenneth J. Fracasso, wanted **Martin** fired.

Purchasing Director Mark A. Douglass, who was a close friend of Centrella's, said he believes the shock of what Centrella did has largely worn off. Friday's conviction, he said, just "puts a final stamp on everything."

# Internet – Newspaper Archives Searches Dale L. Martin

(Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **Dale L. Martin** is listed below.]

Republican-American (Waterbury, CT) December 4, 2013

### **Briefly**

Author: Unknown

Mural Project gets Newman grant

### **WINSTED**

Newman's Own Foundation has awarded the American Mural Project with a \$225,000 grant. Town Manager **Dale L. Martin** announced the award at Monday night's selectmen meeting. He said Paul Newman, the famous actor who died in 2008, was a big supporter of the project.

The project, a massive three-dimensional tribute to American workers, will receive \$75,000 per year over three years. Project founder Ellen Griesedieck of Sharon has said she still needs to raise between \$3 million and \$4 million to complete the project on Whiting Street.

# **Internet – Newspaper Archives Searches** Dale L. Martin

(Articles are in reverse chronological order)

The Register Citizen November 23, 2013

Winchester Board of Education examines causes of its financial woes Past the threat of closing school, Winchester Board of Education looks back on what caused its financial problems

Author: Mercy A. Quaye

Though it took selectmen quite some time to settle on a financial solution to avoid a December school shutdown, a grant anticipation note was eventually passed by voters on Nov. 16. Realizing the situation was time sensitive, town officials worked with Bank of America to have \$2 million from the GAN deposited into the Winchester Board of Education's account by Nov. 22. Relieved and unburdened by the looming deadline, members of the Board of Education are beginning to reflect on the year's events. Moving forward, officials are trying to pinpoint what went wrong, if it could have been avoided and if the threat of shutdown was just a scare tactic.

Nadine Savage, the Board of Education's business manager said the issues have been building up for a long time. For her, the financial meltdown began before the former finance director Henry Centrella's termination and, without proactive efforts, closures were inevitable. Centrella was fired early this year. He was arrested on Aug. 29 and charged with five counts of first degree larceny ranging back to 2005 because of the alleged embezzlement of roughly \$2.5 million from the town. He is currently being held on a \$100,000 cash bond in New Haven Correctional Center.

Savage and Superintendent Dr. Thomas Danhey maintain that going to the state was the most appropriate measure that could have been taken. According to them, the cash projection outlined by Town Manager Dale Martin in the spring of this year was never enough to stabilize employee payroll. They said they knew that then and did not agree to it. While **Martin** holds his position that the Board of Education spent money it would receive from the town faster than it came in, Savage said holding off was not an option. Martin advised the board to cut discretionary spending in order to spare the expenses. The board said its budget was as tight as it could be and that, besides cutting a \$500 paint job at an elementary school, Danhey said the bills were monthly expenses that could not have been put on pause. "These are really regularly recurring bills to us," he said. "There aren't a lot of bills that come in that's out of the blue."

According to Savage, the board is currently working off of a budget of \$21,363,749. The town's appropriation for the school district has remained at \$19,958,149, but the board receives additional funding from grants and federal revenues. Savage said this additional income of about \$1,405,600 comes from grants for special education and reimbursements. About \$6,457,691 of the board's budget is appropriated for salaries. That amount is split between the superintendent, pupil personnel, principals, business services, instructional staff, student support services, substitutes, and custodial and secretarial personnel.

## Internet – Newspaper Archives Searches Dale L. Martin (Articles are in reverse chronological order)

Savage said the board recently switched health insurance companies to release some funds. In the 2012-13 school year, the board made the move from Anthem Blue Cross Blue Shield to Connecticare because of the savings in premium costs. About \$308,150 is budgeted for purchased professional services like curriculum development and audit fees. The board appropriated \$240,673 for repairs and maintenance – snow removal, water and sewer etc. Nearly \$11 million is appropriated for transportation and tuition to other schools and \$473,577 goes to student and staffing supplies. Other expenses include instructional equipment, and technology. Savage said the budget appropriations vary a bit because of uncalculated and unexpected expenses. Savage said the budget, as it stands, does not have any discretionary spending. Every month when a bill comes due, the board does not have the option of asking debtors to hold off.

The start to the financial downfall became apparent in December 2011 when the board was unable to make a full payment to The Gilbert School – a quasi-private school that more than 500 Winchester students attend. Savage said by the end of the 2011-12 fiscal year the board owed \$1.2 million in past due bills. The following year, the board said it was instructed to "hold back" on paying. In December 2012, the board began receiving termination notices from CL&P and other debtors. By the end of the fiscal year, the board owed \$1.7 million in past due bills. "But you could see the progression" she said. "It wasn't getting better. The situation was getting worse and we knew was it was like last December. We did the cash flow to see how bad it was really, and it was bad." Savage said that year the board was not sure it had enough money to keep teachers paid and programs running. "Last year we weren't sure we'd be able to pay a lot of bills," she said. "We weren't even sure, for a couple of the payrolls, that there would be enough money in the bank."

Martin said the board's expenditures and contractual obligations are out of line with cash receipts. He said that is an issue it'll need to correct in order to avoid financial issues in the future. "I hope that the Board of Education is more cognizant of that issue during future contract negotiations, budget preparations, and school operations," he said. "The town, despite demands from school officials, simply cannot provide \$20 million on the first day of the fiscal year."

Danhey said he met with **Martin** on Sept. 13 and discussed funding. By the end of the meeting Danhey said he was assured that he would not only have funding but also have the intent to fund in writing. "There was never written confirmation that we would have enough money to cover all of our expenses by December," he said. "While they verbally said 'don't worry everything would be fine,' we said 'give it to us in writing.' That was never given." Watching the snowball grow before their eyes, the board decided to vote on whether to contact the state Board of Education for assistance. In September the board voted on the matter, but the vote failed 5-4.

Shortly after the vote, Judith Palmer, superintendent of Region No. 7, and Shared Services contacted the state Department of Education to "go on record" about the town's financial debacle and the Board of Education's inability to pay its bills. "We're all working towards the same goal," Palmer said. "We know there's just not enough money and that's the problem." Palmer's two-page letter addressed her concerns about the town and said she hopes the Office of Policy and Management can help. "I am writing to inform you of a serious situation regarding services

# Internet – Newspaper Archives Searches Dale L. Martin

(Articles are in reverse chronological order)

provided by Regional School District No. 7 and Shared Services, Cooperative Education Service Center that provides specialized services and special education, to the Winchester Board of Education and [its] failure to pay them for these services," Palmer wrote to Gian-Carl Casa, undersecretary for Legislative Affairs for OPM. "It is my hope that you will pass these concerns along to the Municipal Finance Advisory Commission so they can consider this information in their decision making process."

With more information on the table, and additional evidence that pointed to impending closures, Danhey decided to contact the state, though the Board of Education voted against it. "I wrote the letter to [Stephan] Pryor to inform him that I wanted to file a 10-4b complaint," Danhey said. "When the vote happened, the board members didn't have all the information that I received several days after the board's meeting. That's why I did it on my own accord. The ship was sinking." Savage said at that point it was apparent that the board's condition would not repair itself in time to meet December obligations. Per the cash projections, Savage expected to be \$1.3 million short by December and \$1.9 million short by January.

"What we could have done is said that we will just play it by ear and see what happens," Danhey said. "But we can't run a school district playing it by ear. Was I crying wolf? No. Was this a scare tactic? No. This was imminent and I wasn't comfortable. How do you tell families that we're going to have to close the schools?" Danhey said moving forward he thinks the supplemental tax should help the town restore its general fund and in turn help adequately fund the minimum budget requirement. Savage said the town should establish a higher mill rate in next year's budget to have an available "cash balance" to handle cash flow. When crafting a budget next year, Danhey said he has no intention of asking for more than a 1 percent increase to the MBR. He said he thinks that amount is modest and that anything above that wouldn't be passed.

On their end, Savage intends to keep the board of education's budget at a minimum. She said the 0 percent increase that teachers agreed to while crafting their union contracts will help balance the budget. One thing that she cannot plan on is whether The Gilbert School will decide to increase its budget during contract negotiations. Currently the parties are in a stalemate with Gilbert refusing to codify a zero increase in the contract.

Martin said the town is already beginning to see growth and he is pleased that the issue was rectified. He said he is happy that Bank of America and town officials were able to help the board of education. "Plenty of good things are happening in Town" he said. "...But they tend to be overshadowed or ignored. The town staff has risen to meet the challenges left by the former finance director." Danhey said he thinks the town officials were dragging their feet to rectify the issue but is relieved that the situation was ultimately handled. "I'm not glad with how this has worked out, I'm just glad it's gotten on firmer footing," he said. "Because I think finally the town did what need to be done."

# Internet – Newspaper Archives Searches Dale L. Martin

(Articles are in reverse chronological order)

The Register Citizen November 6, 2013

### Winsted's Dale Martin to stay on as town manager

Author: Mercy A. Quaye

It's no secret that shortly after a change in leadership on the Board of Selectmen, the presiding town manager has either quit or been fired. During this campaign season, each party has touted their willingness to work with the current manager for as long as he is able. Now that the ballots are in, the Republican supermajority said it will stand by its word and work with the current Town Manager **Dale Martin**. **Martin** said he was not nervous going into this campaign season. He said he had faith that each party would stick by their word to create steady leadership. "I'm confident that what we're doing is good for the town," he said. "I expect that the board of selectmen will see that, irrespective of party affiliation. I'm not here to work for the Republicans. I'm not here to work for the Democrats. I'm here to work for the town."

Several town officials have said the repeated change in town managers added to the town's inability to catch the former finance director Henry Centrella's alleged theft. Centrella is facing five counts of first degree larceny for allegedly stealing approximately \$2.5 million since 2005. "It may have played a small role," **Martin** said about the lack of managerial stability. "But it had to be considered a factor."

According to the town's charter, in order to replace town manager, the Board of Selectmen needs five votes in favor of it. With the Republicans now dominating the board, the party has enough votes to pass any motion it sees fit. Selectman Candy Perez, a Democrat, said though she thinks Centrella's actions had little to do with the pace of incoming town managers, she doesn't think it helped. "The five votes will carry most anything that they want to carry," Perez said, "whether it's positive or whether it's negative. It's our hope that the majority that has the votes will want to keep him."

Perez said she and her fellow Democrat on the board, George Closson, have no intention to remove **Martin** from his seat. "Our intention, as it's been known from the beginning, is that we would keep him," she said. "We don't think the high turnover has been good for the town." **Martin** has often been credited for spotting the financial discrepancies in Centrella's accounting. Within his first 18 months of office, **Martin** suspended Centrella due to suspicion of theft, and then ultimately fired him in February this year. **Martin** detected the embezzlement while having served far less times than his managerial predecessors. After spotting the theft, he proceeded to hire a couple professionals to fill positions that were once filled by individuals who were grandfathered in.

Earlier this year, Robin Manuele was hired to fill the vacant finance director's position. She is a licensed CPA and has worked for BlumShapiro and other municipalities. Since beginning her tenure with the town, she has implemented several new accounting procedures that will ensure

## Internet – Newspaper Archives Searches Dale L. Martin

(Articles are in reverse chronological order)

the future financial safety of the town. Her work with the town manager and board of selectmen has led to new checks and balances that will prevent the possibility of theft.

Martin also hired Neal Amwake as the director of Winchester Public Works. Since hired, Amwake has regularly attended Board of Selectmen meetings to engage and inform the public. Amwake has 19 years of experience and a specialty in water resources. With the town manager's help, Amwake started a Capital Improvement Projects Committee that will assess the department's budget and try to maneuver through it. Amwake intended to create a committee that will be able to balance funds while finding anticipated expenditures. Martin said he thinks his work in hiring the new professionals will be apparent to the board. Newly elected Mayor Lisa Smith said she recognizes the hard work the board faces, and because of that she intends to work closely with Martin. "We want to work with Dale," she said. "I think we need all of the support from the community. I think we have a good board to work together."

Smith said though creating stability is important, she doesn't think it should take any town manager very long to get acclimated with the town. "I think any time you go into any position, it would take maybe three months to get caught up," she said. "I think what happened with the finances is that in past years we haven't followed the recommendations of the audit management letter." Smith said she thinks hiring professionals and holding each person responsible for their job will move Winsted in a "better direction". She plans to work with **Martin** while also avoiding micromanagement.

## Internet – Newspaper Archives Searches Dale L. Martin (Articles are in reverse chronological order)

The Register Citizen

### Winsted explores short-term loan to solve cash flow issues

Author: Mercy A. Quaye

September 30, 2013

Town officials decided to take their chances with a short-term loan with the hopes of satisfying an anticipated gap in financial coverage come December. During a special meeting of the board of selectmen Thursday Sept. 26, the board discussed options to remedy the town's current cash flow issue. The selectmen and Town Manager **Dale Martin** decided that a short-term loan would be the one of the quickest options to explore. **Martin** has reached out to Northwest Community Bank and Simsbury Bank to inquire about short term lending. He said he is trying to determine if it is possible to take out a loan with the Water and Sewer Commission as the borrowing entity. "Either the town can go straight to bank," he said, "Or it's possible to go through water and sewer because they already owe a lot of money. They basically front the money and use the money that they were going to pay the town back with to pay for the loan." The volunteer water and sewer commission has run a deficit since 2004 and currently owes the town \$3.2 million. It was solely advised by former finance director Henry Centrella. Centrella resigned from his position with the town in January after more than 30 years on the job and was arrested in August on five counts of first-degree larceny. He is accused of embezzling more than \$2 million from the town since 2008.

Martin said the banks are currently reviewing information and have been cooperating with the town to come to a decision. "They're all just gathering information at this point," he said. "I think they're both doing what they can and we'll wait and see how long before they can offer up something or walk away." Martin said neither bank has guaranteed that they'd be able to make it work. However the board is looking for an answer from the banks by this week. If they are denied, they will begin looking into options. "If we do need to pursue other options, we still have time to work on it," he said.

Selectman Mike Renzullo said he thinks the boards and the bank should be time conscience considering each option will yield returns differently. "There's no reason to believe they wouldn't be able to do it," Renzullo said. "I think everyone wants to go the road it seems to be the most painless." The other option the town has discussed is requesting a change in the Education Cost Sharing state grant disbursement. "Those are the two that will likely generate cash in the quickest amount of time," he said. "Either of the options with the bank or with ECS might be a little more expedited because we're going to need the cash in December." By December, the town expects a cash shortfall that will dramatically affect the flow of business for the town and its vendors. Because of this, town officials have warned the board of education that it will likely not receive its December payment until January, or possibly February. "[The banks] are willing to consider it," he said. "Neither of them has shut us out." As reported by the town's finance director, Robin Manuele, the town has collected \$11.3 million in taxes to date. During the meeting she said the revenues are "generally" meeting budget expectations. However the town currently owes \$640,000 in past due bills.

# **Internet – Newspaper Archives Searches** Dale L. Martin

(Articles are in reverse chronological order)

The Register Citizen September 3, 2013

Winsted's Dale Martin: Centrella case leads to 'loss of public trust' in town Winsted town manager addresses arrest of former finance director

Author: Mercy A. Quaye

During the Torrington-Winsted Rotary Club Luncheon Tuesday afternoon, Winsted Town Manager, Dale Martin, spoke about the town financial issues and tried to address residents' confidence in the town. On Friday, Winsted's former finance director, Henry Centrella, was arrested on five counts of larceny. Through an extensive investigation, detectives discovered Centrella allegedly used his illegally-acquired money to fund his second life with his Floridian mistress. "Truly the most significant impact of this weekend's events is the loss of public trust in Winsted," Martin said.

Before discussing the torrid details of Centrella's arrest this weekend and the town's current financial state, Martin discussed his own former position as city manager in Davison, Mich. According to Martin, political banter led to his termination. After he refused to arbitrarily fire the city's public works director, the elected officials let him go. "I had the support of the community," Martin said. "My pledge to the people of Winchester and of northwest Connecticut is that I will continue to strive to do the right thing, no matter how difficult that choice is." Before an audience of about 50 Rotarians, Martin said the wrong-doings of the former finance director started to come to light early 2012. "[That's when] we started to have some inkling of what was going on," he said. "It pretty much came to a head last November."

He said he and the town's attorney, Kevin Nelligan, were called into a meeting with a forensic auditor who had noticed a few discrepancies. These inconsistencies in the town's financial records led to Martin suspending Centrella Nov. 9 of last year. "I think he knew what was going on for a while," Martin said. "I think he was aware that the hounds were on his tail." Martin said one irregularity that was a red flag for him and the finance department was a \$100,000 transfer from the Soldiers Monument Fund to pay for water and sewer bills. "That was the loose thread on the sweater that I saw," Martin said.

He told the Rotarians that Centrella was well respected and that after his suspension many people still had their doubts. "I don't think it was until they uncovered the component that he was falsifying the W-2s...that opened up their eyes," he said. The W-2 scheme was discovered by internal town staff earlier this year. "This is something that a few of us in town hall have been carrying around for almost a year now," he said. "But I'm confident we'll turn the corner." The long-term ramifications of Centrella's actions include a shortfall of cash in the town's general fund. Martin points out that Winchester's financial downfall is not a matter of an under funded budget.

The town's budget is expected to be fully funded by taxpayers. According to Robin Manuele, the mill rate increase has not negatively affected the steady flow of tax payments. However the town

# **Section 6**

# Internet – Newspaper Archives Searches Dale L. Martin

(Articles are in reverse chronological order)

is quickly running through its summer cash flow from tax collections and will have to wait until January for another boost of income. "This December will be a challenge," he said. "But I think we'll make it." **Martin** said that town's saving account has been affected the most from Centrella's alleged embezzlement. According to him, a town with a \$10 million dollar budget should have 15-20 percent of its budget in a fund balance. **Martin** said the last audit measured the town's fund balance at \$150,000 - 0.3 percent of the budget. "The town had plenty of money [at one point]. The town was reasonably well off," he said. "But that's gone."

The Rotarians questioned the town manager about Winsted's strategies for regaining public trust, checks and balances, job creation, recovery and dealing with the town's current issues. **Martin** said he thinks the town is heading in a good direction with hiring new public works and finance directors. He also said there are fidelity bonds and other insurance claims against Centrella which will grant the town a return of some of what was lost. "Again, we're just working on public trust," he said.

# **Internet – Newspaper Archives Searches** Dale L. Martin

(Articles are in reverse chronological order)

The Register Citizen August 5, 2013

## Winsted meeting discusses budget problems, ends contentiously

Author: Mercy Quaye

Winchester Board of Selectmen voted to transfer a total of \$207,767 from accounts that have under spent in last year's budget to accounts that can use the funds. The majority of the transfers came out of several different Police and Highway Funds. Town Manager, Dale Martin, says the transfers are in an effort to make the budget predictions as accurate as possible, which is why some transfers are in the amount on \$8 or less. "These are fund transfers are in efforts to address the ongoing and repetitive auditor comments about line items not being reconciled by the end of the year and reflecting over spending," Martin said.

Martin says he approached the police department on the matter early Monday afternoon. The department made it clear to him that it hadn't used its entire budgeted fund upon the completion of the fiscal year. More than \$100,000 is coming out of various police department accounts and more than \$24,000 out of highway accounts. The accounts that will receive the transfers include several commissions and boards as well as town hall departments.. The 2011-12 audit, which still isn't complete, and other audits have cost the town \$61,452, which will be paid by transfers of funds. Employee benefits will also be catered to by the transfers.

"I just think that it's absolutely ridiculous," said Selectmen Kenneth Fracassco. "The town manager is supposed to oversee everything and if he doesn't have a handle on what's going on before the end of the fiscal year we're in big trouble. Fracasso says the funds should have been accounted for properly in the initial budget. "The roads in the towns are horrible," he said, "and we constantly take money out of the highway funds. They keep saying they want to do road repair but they never do. These things need to be addressed." Fracasso says he doesn't think the town is following a plan that will lead to road repair. He says the resident on Carey Avenue who spoke about the condition of her roads has a cause for concern.

Fay Christiansen has lived in Winsted for 24 years and said she feels as though the selectmen are neglecting her and her street. "I've had zero town maintenance on that road," she said. "I've asked repeatedly for it to be repaired and I've been told repeatedly that it was finally going to be done in 2013." While addressing her issue with Martin, Christiansen demanded to know when her street would be tended to. Martin informed her that Carey Avenue was on the list of streets to be repaired as drafted by Public Works. Martin read the finance director's report to the public and the board of selectmen in her absence. In her report she noted that the former finance director, Henry Centrella, would pay bills, but fail to allocate which account money would be deducted from.

"We're not making budget transfers down to \$1." **Martin** said. "That's how exact we want to be that we can track things to the dollar." Selectmen Mike Renzullo said there was no point of voting against it. "Even though I don't like the fact that these fund transfers need to happen, at

# Internet – Newspaper Archives Searches Dale L. Martin

(Articles are in reverse chronological order)

this point it's just bookkeeping," he said. "The important thing is to record this information for use when formatting future budgets. What's done is done." Selectmen Fracassco and Glenn Albanesius, both Republicans, voted against the motion but it passed 4-2. Monday night's meeting was the first after Winchester amended its public comment policy to change it from a previously adopted policy put in place earlier this year after selectmen determined several comment periods had been out-of-control. The town was approached by the American Civil Liberties Union of CT and informed it that the previous public comment policy that restricted view-point based comments was unconstitutional.

After tweaking the wording of the policy, and unintentionally violating the town charter, the board fixed the policy to be open all and any type of public comment, as advised by Town Attorney Kevin Nelligan. The policy change lead to a meeting that became uncivil and out of the control of the board and Mayor Maryann Welcome, who criticized members of the audience on their conduct during the meeting. After telling him to take his seat when the allotted time passed, Welcome engaged in a brief conflict with Jay Budahazy, the Winsted resident who brought the policy issue to the ACLU. When the meeting was abruptly adjourned, Welcome made a swift exit in order to avoid further confrontation with residents and board members. Residents pulled the town manager aside to after adjournment to further express their issue with agenda items and infractions.

# Internet – Newspaper Archives Searches Dale L. Martin

(Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **Dale L. Martin** is listed below.]

Republican-American (Waterbury, CT) March 11, 2013

#### **Local News**

Author: Kurt Moffett

#### winsted

If recriminations were dollars, they'd be richer than Greenwich It doesn't take much to stir the pot in Winsted, and the town's financial problems have certainly done that. Nearly half of Monday's selectmen meeting was taken up by public comment. The second round of public comment lasted nearly 40 minutes.

Stephen Kosinski was critical of Mayor Maryann D. Welcome for not showing leadership and the entire board for not running the town like a business. Jay R. Budahazy and David G. La Pointe said property owners cannot afford higher taxes. Virginia Shultz-Charette said she does not mind paying more in taxes as long as the money is spent efficiently.

Board of Education member Mari-Ellen Pratt Valyo questioned Republican selectmen Kenneth J. Fracasso and Glenn S. Albanesius about their "fleshed-out plan" for privatizing the public works department and combining the town's finance director and school business manager into one position to save money. Albanesius indicated the school board has not been in favor of merging the two offices.

James N. Roberts, also a school board member, said spending and taxes have gone up significantly in recent years. His wife, Marsha Sterling, said the town needs to address its debts and deficits now. Shultz-Charette got into a bit of a tit-for-tat with several of the other speakers about raises, taxes and who is living in reality and who is living in a fantasy world.

After that ended, Town Manager **Dale L. Martin** defended the selectmen for how they have handled the financial crisis thus far considering the whole situation has just unraveled over the past three months. He also encouraged residents to ask questions because "there's a lot of misinformation being put out there." He said it is going to take a lot of time to correct the "ugly" financial problems. "There's enough blame to go around. You could have a circular firing squad," **Martin** said. "No one person is to blame. This is a community failure. We spent the last 45 minutes going back and forth between people and it was probably the most unproductive 45 minutes I've spent in my life in Winsted."

Selectman Michael J. Renzullo then mock-clapped LaPointe, who had applauded earlier comments by Roberts and Sterling.

# Internet – Newspaper Archives Searches Dale L. Martin

(Articles are in reverse chronological order)

Republican-American (Waterbury, CT) January 29, 2013

### Winsted slowly paying its outstanding bills

Author/Byline: Kurt Moffett

The town is slowly whittling away at the \$4 million it and the school board had owed to more than 200 vendors, but questions remain about whether there will be enough money to pay off all municipal expenses through the end of the fiscal year on June 30. With tax payments coming in, the town has the cash to start paying its creditors. As of Monday, the town owed 118 vendors \$631,565, down from \$706,000 to 130 vendors on Dec. 28. "That number changes every day," Town Manager **Dale L. Martin** said.

The school district, which operates schools for kindergartners through sixth-graders, owed more than \$3.2 million to 87 vendors as of Jan. 8. Superintendent Thomas M. Danehy could not be reached for comment Monday, but town finance officials said a \$313,000 payment was made Friday to Shared Services, a cooperative education service center that provides specialized services and special education staff and programs to school districts in northwestern Connecticut. The Gilbert School, the town's quasi-public junior-senior high school, was expected to be paid in full today.

The town, via the school board, is supposed to pay Gilbert \$564,365 each month. The town was unable to pay in December and paid only half of its January bill, or \$282,182. The school, founded in 1895, has relied on the town for money because the endowment it was founded on has not had the cash to pay its operating expenses since the 1950s.

Shared Services, which serves Barkhamsted, Colebrook, Hartland, Norfolk and Region 7 school district, was owed \$868,054 as of Dec. 15. The \$313,000 payment was what Shared Services requested, Colleen Garrity, an assistant in the finance office, said.

On the town side, Winsted owes \$51,707 to Connecticut Light and Power but town officials said they have worked out payment arrangements with the utility company and there is no risk of CL&P shutting off the town's power. "They've been really great," Garrity said of CL&P.

The town's cash-flow problems stem from having no money in reserve. Typically, the town would dip into its reserves to pay off bills from November to January, when tax collections taper off, then replenish the reserves when tax payments start coming in after Jan. 1. Tax Collector Arlene M. Boutin said tax payments continue to come in "on par" with other years. As of Monday, \$15.9 million of \$20.9 million, or 76 percent, of taxes owed had been paid. Friday is the last day taxes can be paid without the town charging an interest penalty.

Meanwhile, other financial issues remain unresolved. For one, there is the issue of whether tax revenue from the current fiscal year was used to pay off school bills in the last fiscal year. School Business Manager Nadine V. Savage has said former Finance Director Henry L. Centrella

## Internet – Newspaper Archives Searches Dale L. Martin (Articles are in reverse chronological order)

(Articles are in reverse chronological order)

instructed her office to not pay \$1.2 million in bills that were due by June 30 because there was no money to pay them. The school business office had to wait until July 1 tax bills started getting paid. **Martin** said his administration is still investigating the matter. If 2012-13 tax revenues were used to pay 2011-12 expenses, that will create a deficit that the town will have to address, he said.

**Martin** fired Centrella, the town's only finance director for 32 years, on Jan. 17 in part for storing money in his desk, failing to account for missing money and making unauthorized transfers. State police are investigating whether a crime was committed in connection with the town's financial problems.

The town is current on all bond payments and all town employees have been paid on time, **Martin** said. There is one \$492,000 sewer bond payment that needs to be paid but the Water and Sewer Commission has until June 1 to pay it.

The Water and Sewer Commission, a five-member independent body that funds its operations by charging its users, is also under a financial strain. **Martin** told members two weeks ago the commission had \$27,000 in the bank rather than the \$1.8 million they thought they had. **Martin** said he did not know whether the commission will have enough to pay its operating costs and the outstanding bond payment. The commission, however, just sent out its third-quarter user bills, which are due March 1 without penalty. Commission member Stephen Vaill has said \$402,000 is expected in water revenue and \$683,000 in sewer revenue. Fourth-quarter bills are due June 1 without penalty.

The town's newly hired auditing firm, King, King and Associates, is expected to deliver a financial analysis of the water and sewer accounts to the selectmen on Feb. 19.

## Internet – Newspaper Archives Searches Dale L. Martin (Articles are in reverse chronological order)

The Republican-American January 17, 2013

### Winsted town manager hears board's evaluation in open session

Author: Kurt Moffett

The Board of Selectmen told Town Manager **Dale L. Martin** he needs to communicate better with the board, especially about the town's financial troubles, in his first job evaluation in more than a year. During a 45-minute session Wednesday at Town Hall that **Martin** chose to have open to the public, each selectman had a chance to comment on how he or she felt **Martin** had performed on the job since he was hired in April 2011. Some, like Democrat George N. Closson, spoke at length, while others, like Republican Glenn S. Albanesius, were quick and to the point.

The five Democrats on the board largely praised **Martin** for his work while the Republicans were critical. **Martin** has come under increased scrutiny as the town's financial problems mount. The town owes more than 200 town and school board vendors roughly \$4 million. **Martin** has said the town has not had the money to pay its bills but is confident it will once the Jan. 1 tax bills are paid by the end of the month.

Republican Selectman Kenneth J. Fracasso and Albanesius called for a meeting on Saturday to discuss **Martin**'s job performance. Fracasso wants **Martin** fired. But Town Attorney Kevin F. Nelligan advised the board to cancel the meeting until he was able to meet with the town's auditing firm, West Hartford-based BlumShapiro, on Monday to review its findings from the 2010-11 audit. On Wednesday, Nelligan revealed that the state police major crimes unit is about to begin a criminal investigation that is connected to the town's financial troubles.

For **Martin**'s evaluation, each selectman was given a four-page form to fill out. The selectmen were to rate **Martin** on his job knowledge, accomplishment of objectives, quality of work, productivity, initiative and creativity, interpersonal relations, supervisory skills, dependability and professional contributions. **Martin**'s annual salary is \$84,589. The selectmen did not bring up whether he would receive a raise and **Martin** has said he is not expecting one.

Closson was the only one who spoke about how he rated him in all the different categories. He gave "needs improvement" in several categories and "meets job requirements" in several others. He said **Martin** has always exhibited professionalism, despite the increasing pressures of the job, which include taking over the duties of the town planner after the position was eliminated because of budget cuts. He said **Martin** appears at almost every scheduled event in town, despite his busy schedule. Closson said he thinks **Martin** has been hurt by the turnover in the town manager's office over the years. The town needs stability and continuity in that office in order to overcome the problems it now faces.

"I think that the opportunity we have in front of us right now to look across the board globally at how our community operates from a financial standpoint with handling money is critical," he

# **Section 6**

# Internet – Newspaper Archives Searches Dale L. Martin

(Articles are in reverse chronological order)

said. "I think this is a tremendous opportunity to work with the Board of Ed and the sewer commission and so forth to bring this all together in one comprehensive plan." Fracasso criticized **Martin** for not having a "full understanding of financial responsibilities," not giving the board financial reports and not communicating to the board the extent of the town's financial problems. "If it wasn't for the fact that we got a letter from the Board of Education/superintendent (last week) we wouldn't have any idea we were \$4 million in arrears in vendor bills," he said. "This is something that should've been brought to our attention months ago." Mayor Maryann D. Welcome said the board wants weekly financial reports and improved communication on any ongoing or new issues.

# Internet – Newspaper Archives Searches Dale L. Martin

(Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **Dale L. Martin** is listed below.]

Republican-American (Waterbury, CT) November 22, 2012

#### **Local News**

Author: Unknown

#### WINSTED

Town wins grant designed to spark local economy

The town manager announced Wednesday that the town has won a technical assistance grant from a national organization that could help spark a badly needed economic revival here. Town Manager **Dale L. Martin** said the grant is from Smart Growth America, headquartered in Washington D.C.

The town applied for the planning for economic and fiscal health workshop. The workshop draws on successful private and public sector lessons to help local leaders foster communities that cost their taxpayers less to build, run and maintain. It will show how local governments can save money, how businesses can make money and how the community's long-term fiscal and economic health will improve.

The workshop is offered at no cost to the town, thanks to a grant from the federal Environmental Protection Agency. **Martin** said he will not know when and where the workshop will be held until he talks to Smart Growth representatives.

# **Internet – Newspaper Archives Searches** Dale L. Martin

(Articles are in reverse chronological order)

Republican-American (Waterbury, CT) November 12, 2012

No town planner for Winsted - Part-time position falls victim to budget cuts Author/Byline: Kurt Moffett

The town's efforts to jump start economic development will have to be done without a town planner. The \$30.9 million budget voters approved Oct. 27 eliminated the part-time position. Town Manager Dale L. Martin said he will take on the planner's duties at no additional pay. Martin's annual salary is \$84,589. Martin said the town planner position will be eliminated Nov. 21.

Scott Eisenlohr is currently the town planner and wetlands enforcement officer. Both positions are considered part time, but because he holds both positions he is considered full time with a \$45,000 annual salary and benefits. When he is laid off as the planner, he will become the parttime wetlands officer at a salary of \$30,000 with no benefits.

The planner position was eliminated because of budget cuts. Voters went to the polls four times before agreeing to a budget that does not increase taxes. The first budget proposal, which was defeated on June 2, included a full-time planner and economic development coordinator who would have been paid \$70,000 annually. It was cut after that budget was soundly defeated.

Town officials question whether Martin can successfully pull off being the town manager and planner. They say he will have to delegate some of the duties of both positions to other town staff. "We have to be creative and work with what we have," Mayor Maryann D. Welcome said. "We'll see how he does but **Dale**'s pretty good at this kind of stuff."

Selectman Glenn S. Albanesius, who along with fellow Republican Selectman Kenneth J. Fracasso, objected to every budget proposal, has been making economic development a top priority. He has said the town desperately needs to attract new businesses so it can build its tax base and generate the revenue it needs to fund badly needed infrastructure improvements. Albanesius said he wants the selectmen to work closely with the Economic Development Commission and give the commission a specific mission. He would like the town to put together a sales team that would meet with developers to convince them to come to town. The commission met with selectmen Monday to propose a strategic plan that outlined some longterm objectives, including attracting a minimum of four new, multi-employee taxable businesses to town.

Commission Chairman Richard Labich said he does not know whether Martin can pull off working both jobs. "I think we're going to find out," he said. "I haven't talked to him about it yet but it's something he'll have to work out. I'm going to work with him as much as I can and hope for the best."

# Internet – Newspaper Archives Searches Dale L. Martin (Articles are in reverse chronological order

(Articles are in reverse chronological order)

Eisenlohr said **Martin** is going to find it very difficult. He said he has trouble getting his two jobs done in a 35-hour workweek, focusing his efforts on paying customers only. "He's going to have his hands full," Eisenlohr said of **Martin**. "I already told him it's going to be a nail in his coffin. I told **Dale**, 'You're going to burn yourself out in less than a year. Then when you can't keep up with things they'll dump you. This is why town managers don't last here." Eisenlohr said the planning office used to have three full-timers who worked a combined 105 hours per week. Now the office consists of one full-timer who's about to go part time and a part-time secretary who work 47 hours per week combined. The wetlands officer was cut to part time three years ago.

The planner is responsible for putting the packets and agendas together for each meeting of three boards - the Planning and Zoning Commission, the Economic Development Commission and the Redevelopment Agency. The planner meets with applicants and reviews their plans to make sure they know exactly what they need in order to get their project approved.

The planner also attends each board's meeting and makes recommendations. The Planning and Zoning Commission meets twice per month and the Economic Development Commission and Redevelopment Agency once per month. **Martin** also attends at least two selectmen meetings per month as the town manager, as well as numerous other regional and statewide meetings.

**Martin** said he's confident he can do both jobs. "We'll find a way to make it happen," he said. "We have to."

# Internet – Newspaper Archives Searches Dale L. Martin

(Articles are in reverse chronological order)

Republican-American (Waterbury, CT) October 25, 2012

#### Winsted sees contract savings

Author/Byline: Kurt Moffett

The Board of Selectmen unanimously approved Wednesday a new three-year contract for department heads that is expected to save the town significant money and lay the groundwork for negotiations with the three other town employee unions. The contract for the supervisors union calls for no raise the first year, retroactive to July 1, 1 percent the second year and 2 percent the third year. The union includes the assessor, the chief operator of the sewage treatment plant, the chief operator of the water company, the recreation director, the senior center director, the tax collector, the full-time firefighter, the purchasing director, the building official, the housing inspector and the fire marshal. The recreation director, the housing inspector and the fire marshal are all-part-time positions, though Steve Williams is both the housing inspector and fire marshal. The recreation director is not eligible for health benefits; Williams is because he holds two part-time positions but has opted out. The salaries and benefits of the chief operators of the sewage treatment plant and the water company are funded through water and sewer fees and not taxes.

Town Manager **Dale L. Martin** said the savings in the supervisors contract is primarily in health insurance. Employees are moving from a point of service plan, with an option for a health savings account, to a health reimbursement arrangement, or HRA. Under an HRA, there is a \$2,000 deductible for individual coverage and \$4,000 for a single plus one or family coverage. The town will reimburse the first 75 percent of the applicable deductible and the employee will be responsible for the remaining 25 percent. "It's the exact same coverage just funded differently," **Martin** said. The town hopes the police, public works and secretary unions, totaling some 40 employees, will also agree to the HRA plan. **Martin** estimates that if all four unions have HRAs, the town will save at least \$160,000 per year and probably more because that estimate is based on all employees hitting the 75 percent mark on the deductible. The police and secretary union contracts expired June 30, while the public works one ended June 30, 2011. **Martin** said negotiations with all three unions will be done simultaneously and begin next month.

The supervisors contract also increases the employees' premium share from 15 percent to 16 percent, effective July 1, 2013. For employees hired after July 1, 2012, their premium share will be 25 percent. New employees will also not be allowed to participate in the town's pension plan and instead enter a deferred-compensation plan, like a 401(k).

Martin said the supervisors union voted Tuesday to accept the contract. "Given the (financial) circumstances of the town," Martin said, "this is a fair deal."

William Ryan, the town's labor lawyer, said the agreement is very positive for the town. "This employee group should be applauded," he said. "They recognize the economic difficulty facing this community."

# **Section 6**

# **Internet – Newspaper Archives Searches** Dale L. Martin

(Articles are in reverse chronological order)

The Republican American October 18, 2012

#### Emails cause angry words, then no action

Author: Kurt Moffett

WINSTED - The Board of Selectmen took no action after a tense 10-minute meeting Wednesday with the town manager over his personal use of a town email account. Kenneth J. Fracasso and Glenn S. Albanesius, the two Republican selectmen on the board, called for the special meeting after discovering on Friday that Town Manager Dale L. Martin and his girlfriend, Lisa Fisher, had exchanged eight personal emails that were either sent to or sent from the town manager email account. One from Fisher was sexually suggestive.

The meeting agenda called for an executive session because this was a personnel matter but in a highly unusual move Martin decided to have the meeting in open session. Mayor Maryann D. Welcome then gave Fracasso and Albanesius the chance to address the issue first. Sparks flew right from the start. Fracasso began by saying, "I shouldn't have to explain to a high school civics teacher, a middle school principal and a Eucharistic minister of a Catholic church ..." when he was interrupted by Selectman A. Candy Perez, a Democrat and principal of the Region 7 middle school. "We don't need to have a lecture on this," she said.

Welcome let Fracasso continue, provided he addressed the personnel issue. Fracasso said he wanted to handle this "sorry affair" as discretely as possible and "without politics" after finding out about the emails Friday night. But after Martin forwarded the emails in question to each selectman and talked to a reporter about the matter, "it's turned into a three-ring circus." "It's humiliating to the town and also very embarrassing," he said. "And I think he's effectively forfeited all his moral ability to administer reasonably as the town manager. I think if he has any respect for himself whatsoever he should resign right here and now." Albanesius declined to comment.

Selectman James V. DiVita, a Democrat who said he has been a Eucharistic minister in town for 25 years, said he was very disappointed with Fracasso and thought his comments were inappropriate. "We didn't have to go to this point," he said. "We could've done this in a professional manner." Welcome, a Democrat and a social studies teacher at the Gilbert School, said this issue could have been settled at Monday's selectmen meeting. Martin gave each selectman a letter of apology on Monday.

"This was an inadvertent act," she said. "We're talking about five out of hundreds of emails. It almost seems like a witch hunt." Martin said the number of emails is irrelevant. The emails were inappropriate but the occurrences do not indicate a pattern or abuse of the town email system. The emails were sent and/or received on three days in September 2011, on Nov. 23, 2011, and Feb. 18, 2012. "With deep apologies from both myself and Miss Fisher, I assure you it will not happen again and she is as remorseful about it as I am," he said. Martin declined to resign.

# **Section 6**

# Internet – Newspaper Archives Searches Dale L. Martin (Articles are in reverse chronological order)

Fracasso said he did not care whether DiVita was disappointed with him and in fact he was disappointed with DiVita because he had told him that he originally thought **Martin** should at least get a letter of reprimand. He also said that Welcome's "witch hunt" comment "further perpetrates the fact that the Ds and the Rs are never going to get along until this administration is over. So we're going to go another year of the same old crap that we've been going through for the first year. This is another black eye for the supermajority over there on that side of the table."

Perez said **Martin** did not attempt to hide the emails and was honest and forthright about what happened and apologized for it. "I think it's all a setup," she said, saying that Fracasso is "very good at twisting and turning" words and "attacking" verbally. Welcome asked board members, and specifically Fracasso, if anyone had a motion to make and no one did.

#### Internet – Newspaper Archives Searches Dale L. Martin (Articles are in reverse chronological order)

Republican-American (Waterbury, CT) May 1, 2012

# **Town off the hook for grant - Audit relieves pressure on officials in Winsted** Author/Byline: Kurt Moffett

The Office of Internal Audit at the state Department of Education has determined the town does not have to return \$636,000 in federal grants the school board received in 2009-10. The report, dated Friday and signed by Richard LeMay, the office's supervising accounts examiner, relieves pressure on this cash-strapped town to find the money. Returning that money would have made meeting the state Department of Education's minimum budget requirement this fiscal year that much more difficult.

The town has to come up with an additional \$1.3 million for education because the town-approved school budget of \$18.6 million falls short of the town's MBR of \$19.9 million. Town Manager **Dale L. Martin** said Monday the school board is authorized to spend up to \$19.9 million. The town is not sending the school board \$1.3 million in cash; rather, it has frozen various expenditures on the town side of the budget to ensure there is enough revenue at the end of the fiscal year June 30 to pay expenses. "Henry and I are making sure we have all the money that we need to comply with the state law as they spell it out," **Martin** said, referring to Finance Director Henry Centrella.

The issue over the grants arose in November when the town's auditing firm, West Hartford-based Blum Shapiro, revealed there was a lack of documentation to determine how the Board of Education spent \$636,000 in federal grants in 2009-10. The state Department of Education subsequently warned the town that it could have to pay that money back if the appropriate documentation was not found.

In early January, Superintendent of Schools Thomas M. Danehy submitted that documentation, as well as a corrective action plan the state also required to ensure such a problem would not reoccur. LeMay on Monday said the school district provided documentation for all but \$1,826 of the federal money spent. That money will have to be returned to the state.

# **Section 6**

#### Internet – Newspaper Archives Searches Dale L. Martin (Articles are in reverse chronological order)

The Register Citizen May 10, 2012

# Winsted BOE and BOS resolve their minimum budget requirement dilemma and drops lawsuit against town

Author: Jason Siedzik

Months of legal wrangling over school funding wrapped up in less than five minutes Thursday night. The Board of Selectmen and Board of Education struck a deal during a special meeting at Winchester Town Hall, resolving the questions over the minimum budget requirement. The Board of Selectmen voted to fund the school system at the minimum budget requirement of \$19,958,149, while the Board of Education voted to drop its lawsuit against the town and Selectmen. "I hope this closes the door on a difficult chapter for the town and the schools," said town manager **Dale Martin.** 

The decision makes Winsted the last town in the state to fully comply with the minimum budget requirement, but the vote also closes the book on a drawn-out battle that spans multiple administrations. "I think it's a great thing for the community as a whole," said superintendent of schools Thomas Danehy, who had been hired in the middle of the dispute. "It shows cooperation with the two boards." Two of the four Selectmen to vote in favor of cutting the school appropriation below the minimum budget requirement are no longer on the board, while the superintendent of schools and Board of Education chair that supported the lawsuit have since retired and resigned, respectively. The vote to cut the appropriation occurred just three days into **Dale Martin**'s tenure as town manager, while **Martin** was still learning the lay of the land. "Now we can put it to rest," said Winchester mayor Maryann Welcome.

No one at the meeting voted against either motion, although (WHO) were not in attendance. As part of the deal, Winchester's municipal budget -- which was already frozen in anticipation of the settlement -- will be adjusted accordingly, with multiple line items taking haircuts. The town had already made \$735,000 available from its general fund to help remedy the deficit against the MBR, but with word from the state that Winchester Public Schools will only have to repay just under \$2,000 due to improperly-documented spending, the Board of Selectmen voted to repay the rest of the \$1,358,149 gap. In order to make the rest of the funds available to the town, **Martin** released a proposed set of budget adjustments which will free up the rest of the money.

These adjustments, which will be made in an upcoming meeting, include several open positions that will not be filled during the fiscal year. Specifically, the budget set aside \$24,000 for a part-time economic development coordinator, as well as a deputy police chief. Between not hiring a deputy chief and transferring \$20,000 from police salaries to the department's gas account, the police department will contribute \$49,245 under this draft plan. Public safety dispatch line items will also take a cut in the name of funding. The current budget earmarked \$19,000 for Powerphone software, \$13,230 for a tower rental from Charter Communications and \$12,540 for an NECS service agreement. None of those monies were spent as budgeted, and all of those funds will be made available to the school district.

# **Section 6**

# Internet – Newspaper Archives Searches Dale L. Martin (Articles are in reverse chronological order)

In all, \$1,115,145 will be made available from various line items. The bulk of that money, though, comes from the town's general fund, which was already allotted to the school district. An extra \$243,004 from the town's MME grants -- the renamed manufacturing pilot grant -- will complete the town's compliance.

# **Internet – Newspaper Archives Searches** Dale L. Martin

(Articles are in reverse chronological order)

The Register Citizen March 21, 2012

Winsted town manager: Tax hikes necessary to shore up sagging infrastructure Author: Jason Siedzik

Town manager **Dale Martin** acknowledged that his budget proposal for the 2012-13 fiscal year could be difficult to swallow, but Martin said the included tax hike is necessary to help restore the town's flagging infrastructure. "I present this proposed 2012-13 budget to you as my effort to change," Martin said. Martin's budget proposal, released March 15, calls for a 7.18 percent increase in expenditures, totaling \$2,206,460. These expenditure increases will be offset with a 2.87 mill tax increase, which **Martin** said is the first significant increase since 2005. "This increase is proposed to address some of the critical needs of the town that have been neglected," Martin said, "most notably the town's infrastructure."

In all, the tax increase should result in \$2,428,198 in new revenues, which is nearly a 12 percent increase. A chart included in the cover letter states that the mill rate's increase will cost the owner of a house assessed at \$200,000 approximately \$5,660 per year in taxes. But Martin said the tax increases are necessary to break the town out of its inertia. "I have heard first-hand from you and other residents about the problems of Winchester," Martin wrote, "the historic animosities, the partisan bickering, and the decaying town."

Martin said the tax hike is the first of its ilk in 11 years, with the latest mill rate increase in that range coming in 2001. But including the budget proposal, the town will average only a 0.9 mill increase over the past four years, which Martin said has led to the deteriorating state of the town's roads, drainage and other facilities. "This increase is proposed to address some of the critical needs of the town that have been neglected," Martin wrote, "most notably the town's infrastructure." Spending the money, Martin said, would go a long way towards improving the town's standing statewide. Martin shared an anecdote from his hiring in his letter about the budget. When he started serving as town manager in April, Martin said, he picked up the November 2009 issue of Connecticut Magazine. Winchester ranked dead last in the category of towns with populations from 10,000 to 15,000.

"I am not satisfied with Number 23," Martin wrote, "nor will I be satisfied with 20. I see wonderful people in a town wracked with a lack of confidence; beautiful natural resources that are underappreciated; and a downtown just waiting for something good to happen. We have to change." The majority of the new spending will go towards fulfilling a promise made in November. The town will provide the Winchester school system with \$1,358,149 to make the district whole with the minimum budget requirement. The funds are necessary due to the current budget, which appropriated only \$18.6 million for the school system.

That line item was below the minimum budget requirement, and after municipal elections signaled a shift in the Board of Selectmen -- two of the Selectmen to vote for the budget were defeated, replaced by former Board of Education member Jim DiVita and former mayor

# **Internet – Newspaper Archives Searches** Dale L. Martin

(Articles are in reverse chronological order)

Maryann Welcome -- the new slate voted to comply with the minimum budget requirement and allot the necessary funds. Winsted's Selectmen agreed to comply with the minimum budget requirement, but held back nearly half of the funds, with the rest coming out of the town's general fund. Under Danehy's proposal for the upcoming fiscal year, the town's request of \$400,000 for the general fund will be cut in half. The \$5,000 for the Selectmen's contingency fund remained untouched.

The budget proposal also states that the Board of Education's requested allotment of \$20,592,740 will not stand, with Martin cutting their request to the minimum budget requirement. That cut was expected by the Board of Education, which did not vote to eliminate the curriculum coordinator at their March 1 finance meeting in anticipation that further cuts would be needed. The Board of Education will have to cut \$634,591 from their budget if the proposed town budget carries. One of the other major expenses in the budget is nearly \$1 million in spending for highway repair. Specifically, the budget allots money to reconstruct Newfield Road and Munro Place, complete design work on Holabird Avenue and its bridge, and purchase two new snow plows and a roadside mower. These expenses will, in part, qualify the town for greater funds elsewhere.

The design work on Holabird Avenue and the street's bridge will qualify the road for state and federal reconstruction funds. Additionally, the mower will be partially funded from the state's Local Capital Improvement Program. The budget also sets aside \$125,000 to build permanent restroom facilities at Walker and Ryan Fields, funded using STEAP grants. Some of the proposed changes from the previous budget never took effect, and these changes will be revamped in the 2012-13 proposal. Winsted's Economic Development Commission was to gain a full-time economic development coordinator, but the commission never hired one due to financial pressure. That position will be reclassified as part-time, and will share a full-time secretary with a part-time inland wetlands officer. Additionally, the town will contract out planning services. The reorganized community development department should cost \$135,000.

Martin scheduled a public meeting on the budget on March 26 from 7 to 9 p.m. The meeting will largely be a presentation, according to Martin, who set the meeting at the Monday night Board of Selectmen meeting.

# Internet – Newspaper Archives Searches Dale L. Martin (Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **Dale L. Martin** is listed below.]

Republican-American (Waterbury, CT) February 24, 2012

Feedback positive for budget - Winsted schools - hear taxpayers - on proposal Author/Byline: Kurt Moffett

Gary Pontelandolfo of Hillside Avenue also said he was impressed with the budget presentation. He said he liked the idea of reimplementing an alternative high school to help struggling students and felt overall that there was a greater sense of cooperation "instead of finger pointing and excuses."

Mayor Maryann D. Welcome echoed that sentiment by thanking Danehy, Gilbert Interim Headmaster Daniel R. Hatch and Town Manager **Dale L. Martin** for working together and being transparent with information. "It's a breath of fresh air," she said.

#### Internet – Newspaper Archives Searches Dale L. Martin (Articles are in reverse chronological order)

The Register Citizen January 31, 2012

Winsted town manager hopes to change finance process, holds budget workshop Author: Jason Siedzik

Coming on board near the end of the previous budget cycle, town manager **Dale Martin** has some ideas about how to change the process for the next budget. **Martin** held a budget workshop at Town Hall Monday night, explaining what could go into the 2012-13 budget. What **Martin** said he hopes to inject to the budget process, though, is a hefty dose of explanation. "We need to regain the trust of town residents by spending money on what we say we're spending it on," **Martin** said.

Having served as a town manager for several cities in Michigan, **Martin** detailed some of the differences in budgets between Michigan and Winsted. One example **Martin** said was that in his last Michigan job, town charters limit their budgets by mill rate. No such caps exist in Winsted. "For you guys, the sky is the limit," **Martin** said. Another change **Martin** is bringing over from his Michigan tenure is breaking down the cost of town services by mill rate. Currently, the school budget consumes \$10,655,540 of the 2011-12 budget, or 13.30 mills, or 52.28 percent. Town government functions use \$9,725,799, which is 12.13 mills or 47.72 percent. Complying with the minimum budget requirement, though, will shift those proportions to 59 percent for school functions and 41 percent for town.

Contractual requirements will also call for more of the town's budget as well. **Martin** noted that with a flat budget, much like Winsted's current budget, "even if we keep everything the same, we're falling behind." "We need to look at our personnel costs in town, because some of the first budgets I'm getting," **Martin** continued, "you're looking at 10 to 15 to 20 percent personnel increases across the board." To that end, **Martin** has already asked department heads for their lists of priorities. These lists will be useful in trying to make **Martin**'s best case for the budget before the Board of Selectmen. "They need to hear it from the staff before we get to March 15 and we have departments going in on bended knee, pleading their case," **Martin** said. "It's my job to present and defend that budget in front of the Board of Selectmen."

Pam Banks of the Economic Development commission was one audience member concerned that the town does not keep its promises to residents. For various reasons, including turnover in the Board of Selectmen, **Martin** acknowledged that there has been a breach of public trust. One method to remedy that gap, **Martin** said, would be to "dedicate one mill of our mill rate to public safety" or other projects, such as infrastructure. However, the key would be to hold to that promise. "To me, that's my challenge as the town manager to offer some continuity from board to board," **Martin** said. "I think that's part of the trust issue."

# **Internet – Newspaper Archives Searches** Dale L. Martin

(Articles are in reverse chronological order)

Republican-American (Waterbury, CT) December 7, 2011

#### **Local News**

Author: Unknown

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Police union wins grievance on personal paid time off

The police union has won a grievance against the town regarding personal paid time off. Town Manager Dale L. Martin said after a hearing Tuesday with the union he was not going to take the case to state arbitration. The union had grieved that Martin had decided not to grant an additional four days of paid personal time to Sgt. Kevin Kinahan, who had perfect attendance over a 365-day period.

According to an Oct. 28 memo from Kinahan to Police Chief Robert M. Scannell, the contract between the union and the town states: "If an employee has perfect attendance for any 365-day period they shall receive ... one (4) additional day off."

The union interpreted the numeral "4" as the intended language, while Martin interpreted it to mean "one" day. Martin said despite the ambiguous language, he sided with the union because it showed that five other officers had received four additional days in the last two years.

#### Internet – Newspaper Archives Searches Dale L. Martin (Articles are in reverse chronological order)

The Register Citizen November 15, 2011

Review: Winsted's Town Manager doing exemplary job

Author: Jason Siedzik

Six months into his tenure as town manager, **Dale Martin** dealt with a hurricane, winter storm and educational spending crisis. According to the then-Board of Selectmen, **Martin**'s performance despite these tests has been exemplary. **Martin** had his six-month performance evaluation on Nov. 7, one night before municipal elections brought in a new Board of Selectmen. While such evaluations are typically held in private or executive session, **Martin** not only asked for his evaluation to be held in public, but solicited public comment.

Martin provided an extensive list of goals and challenges to the selectmen and was critical of himself in a number of regards. "There's a lot of red on there for not being able to meet those goals and challenges," Martin said, "because I completely underestimated the challenges this community faces." Martin's background in emergency management was tested recently, as Winsted was one of the hardest-hit towns after the late October winter storm. The town's emergency shelter was busy during the early days of the outage, but the decision to close the shelter Thursday -- five days after the storm -- drew criticism during the public comment portion of the meeting. Power was not restored to much of the town until after the shelter had closed. "I think these were lofty goals," said then-Selectman Karen Beadle, "considering the earthquake and hurricane."

Additionally, **Martin** came on board during a heated battle between the Board of Education and the Board of Selectmen. While the two factions sparred in policy and in public, **Martin** was tasked with responding to the state's inquiry into funding. Connecticut's Department of Education handed down an order to come up with a plan to remedy the \$1.3 million deficit between the approved budget and the minimum budget requirement, and when **Martin** responded that Winsted would need more time, the state initiated an investigation into the funding issue. "It's been a lot to grasp," said Beadle. By and large, though, **Martin** was praised for his work in ushering Winsted's progress. A revamped town website should be published in the coming days, while the town did not apply for a Safe Schools grant due to unexpected requirements. Other grants, some of which focus on Main Street, are on pace to be completed.

Most of the goals **Martin** discussed were extremely short-term, though, due to the limited time frame. Some of the longer-term goals **Martin** placed on his list included finding buyers or occupants for numerous Brownfields properties, a process which ties together initiatives such as federal Brownfield loan funds and Laurel City Revamp. While the town manager said he had failed to complete it in the given time frame, progress is continuing. Additionally, a meeting to discuss the Winchester Industrial Park's growth is scheduled for December, while lines of communication remain open.

#### Internet – Newspaper Archives Searches Dale L. Martin

(Articles are in reverse chronological order)

Martin pledged to work more intensely with town departments going forward, vowing to spend one day per month with each department in town. This pledge fell under the heading of professional development, as did completing six hours of instruction in labor law and negotiations. While that fell apart due to other commitments, Martin said he is continuing to work on obtaining a leadership position with a regional entity. Martin drafted the list of goals to provide direction, and acknowledged that more of them would have likely been completed if not for the need to "put out daily fires." Then-mayor Candy Perez praised Martin for his direction, accessibility and outreach with town employees. But while Perez remarked that "I think we all recognize you have made a lot of inroads while you are here," it was his work in times of crisis that made the biggest impression.

"When the times get difficult, as they did this past week, you rolled up your sleeves," Perez said. "When you were at the shelter, I saw first-hand you were not only a town manager in terms of making decisions of who was deployed where, but you were very honest about what worked and what didn't work."

Then-Selectman Lisa Smith praised **Martin**'s work, having watched him in action at the shelter firsthand. Smith was not alone in her assessment. "More importantly," Perez added, "as I watched you with the shelter residents, helping one get a cup of coffee, that was a dimension we haven't seen." Perez remarked that her evaluation was a positive one, and **Martin** said he wanted to have a hand in guiding Winsted's future as well. "This community needs to take a long, hard look at itself and figure out which direction it wants to go," **Martin** said. "I look forward to being a part of that."

#### Internet – Newspaper Archives Searches Dale L. Martin (Articles are in reverse chronological order)

The Register Citizen August 23, 2011

Winsted Town Manager approached by producers for 'Today in America' spotlight Author: Jason Siedzik

A spotlight on economic development in town sounded like an interesting opportunity at first. But when town manager **Dale Martin** heard the price tag, his opinion quickly changed. **Martin** and Winchester Mayor Candy Perez were approached by producers for Today In America Television, a television show hosted by Terry Bradshaw. The show's website pitches Today In America as a look at "unique businesses and individuals." But once the producers told **Martin** it would cost \$19,800 to produce the segment, the answer was an easy "Thanks, but no thanks."

The pitch, according to **Martin**, centered around Winsted's economic development. The producer referred to the town as a "hidden gem," but **Martin** said he suspected the pitch was merely a cold call, adding that he figured the \$20,000 could be spent more wisely. "It was a disappointment," **Martin** said, "but it didn't cost us anything."

The Fayetteville, Arkansas City Council heard the same pitch, but agreed to pony up the \$19,800 to produce the five-minute infomercial. According to a report in the Fayetteville Flyer, the fee came from the city's economic development fund and approved the expense, believing the segment would be more credible than a promotional video produced by the town. Fayetteville's segment was scheduled to air on the Fox Business Channel beginning February 26 at 3 p.m., according to a blog post on mid-riffs.com. That time slot, though, falls squarely in the middle of a seven-hour block of infomercials, airing on a Saturday on a weekday-oriented network.

# **Internet – Newspaper Archives Searches** Dale L. Martin

(Articles are in reverse chronological order)

Republican-American (Waterbury, CT) August 15, 2011

#### Worker's suspension upheld - Road crewman refused to wear safety vest Author/Byline: Kurt Moffett

WINSTED - The town manager is upholding a three-day unpaid suspension issued to a public works employee last month because he refused to wear his protective vest while on a road job. In a letter sent last week to the employee, Ken Schibi, and the United Public Service Employees Union that represents him, Town Manager Dale L. Martin stated the punishment was justified.

The union filed a grievance on Schibi's behalf July 21 after Public Works Director James A. Rotondo suspended him from July 12-14. Schibi is paid \$24.31 per hour, meaning he lost roughly \$583 in pay. The grievance seeks reimbursement of the lost pay, plus costs and fees associated with the grievance filing. The union claims the suspension was issued without just cause, violating the public works contract with the town.

Martin said he conducted a hearing Aug. 8 that was attended by Schibi, foreman Joe Lemelin, union steward Dennis Millard, union lawyer Barbara J. Resnick and Rotondo. In his letter, Martin wrote that Schibi confirmed he did not wear his reflective vest three times on July 11, violating town policy. Schibi also confirmed he was instructed on three different occasions to put on his vest, Martin wrote. "To my knowledge, no provisions in the town policy or state or federal regulations provide for an exemption for personal protective equipment due to the reasons you offered: You were hot, you were uncomfortable, and you were on a break," Martin stated. "Your failure to wear the required equipment jeopardized your safety and potentially exposed the town (not you) to significant financial penalties (which are in place to protect employees)."

Martin then noted that Schibi had been told on other occasions to wear his vest and had been reprimanded for not doing so. "Your disregard for safety cannot be tolerated, and I find that the punishment imposed is, in fact, with just cause," Martin stated.

Resnick did not return messages seeking comment. Martin said the union has the option of appealing his ruling to a state arbitrator.

# Internet – Newspaper Archives Searches Dale L. Martin (Articles are in reverse chronological order

(Articles are in reverse chronological order)

Republican-American (Waterbury, CT) August 5, 2011

**Dispute over raises settled - Police union had - figured contract - clause differently** Author/Byline: Kurt Moffett

WINSTED - The town manager has settled a dispute with the police union over scheduled raises. The police union had filed a grievance claiming that officers were not receiving the raises they were supposed to get as is spelled out in its four-year contract with the town. The union claimed that Town Manager **Dale L. Martin**'s had misinterpreted the contract language.

The union entered the fourth year of the contract July 1. The contract includes five steps that establish pay rates based on years of service. But there is a clause in the contract that caused confusion. That clause states: "Add a sixth step of an additional 1 percent for members with seven years or more of service to be added in the second year of this agreement and the fourth year."

**Martin** said based on his interpretation, he calculated the raise as follows: he took the step five hourly rate for patrolmen of \$28.19 that was effective July 1, 2010, and multiplied that by 3 percent. He then added the resulting 85-cent raise to \$28.19 and got \$29.04, which he multiplied by 1 percent, bringing the total rate to \$29.33.

The union, however, calculated the raise differently, based on a higher hourly rate, **Martin** said. Rather than start at \$28.19, the union added 1 percent to that, then added the 29-cent raise and got \$28.48 for a step six, effective July 1, 2010. The union then multiplied \$28.48 by 3 percent, bringing the rate to \$29.33. The union then multiplied that by 1 percent, adding an additional 29 cents for a new rate of \$29.62.

In a letter to union President Michael Roy on Thursday, **Martin** stated that the "contract language is grossly ambiguous: I expect better efforts from attorneys representing both parties to the contract. I believe that you conceded that point as well. Such unprofessional efforts make our efforts to operate within the bounds of the contract more difficult."

Despite the ambiguousness, **Martin**, who was hired in April, said he sided with the union. He said he was convinced that the union and the town had intended to give officers with seven years or more of service a raise in the fourth year that was 2 percent higher than officers employed by the department for five or six years. "How we got to step six is how we differed," **Martin** said.

The new rate for sergeants is \$32.96 per hour, up from \$31.68 on July 1, 2010, roughly a 4 percent increase. Police Chief Robert M. Scannell said there are 11 patrolmen and one sergeant who have worked for the department for at least seven years. Two more patrolmen will be eligible for the new rate in October and two more sergeants will qualify in April. He said he budgeted enough money for salaries to handle the rate changes.

# Internet – Newspaper Archives Searches Dale L. Martin

(Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **Dale L. Martin** is listed below.]

Republican-American (Waterbury, CT) July 27, 2011

#### **Local News**

Author: Unknown

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School board declines to meet with selectmen

The Board of Education has declined an offer from the Board of Selectmen to meet Thursday regarding the town's late 2009-10 audit. School board Chairman Kathleen M. O'Brien said the board's attorney, Mark J. Sommaruga, advised against the meeting. She said Sommaruga said it would not be a productive meeting and his advice had nothing to do with the board's pending lawsuit against the selectmen.

O'Brien also said that the board is being told that the town's auditors are receiving information from the school business office, but the auditors keep asking for information. She said school officials are cooperating with the auditor's requests.

The town's audit was due to the state Office of Policy and Management Dec. 31, but the town has had to ask for seven extensions because it is waiting for information from the Board of Education.

Mayor A. Candy Perez said the joint meeting was Town Manager **Dale L. Martin**'s effort to bring the two boards together and possibly reach some solutions. She said she will talk to **Martin** today about whether to still hold the meeting scheduled for 7 p.m. at Town Hall.

# Internet – Newspaper Archives Searches Dale L. Martin (Articles are in reverse chronological order

(Articles are in reverse chronological order)

Republican-American (Waterbury, CT) June 22, 2011

#### Winsted to settle - discrimination suit - Firefighter said epithet used

Author/Byline: Kurt Moffett

The Board of Selectmen has agreed to settle a discrimination complaint from a former fire captain. The board voted unanimously Monday to consent to the town insurance carrier's requested settlement of a lawsuit filed by Phillip J. Roche. The lawsuit is pending in U.S District Court in New Haven. The suit is against the town and former Deputy Fire Chief Porter "Skip" Griffin. The suit claims that Griffin made discriminatory remarks about him and the town failed to take disciplinary action against Griffin.

The board met in a closed session at Town Hall with Town Manager **Dale L. Martin** and David S. Monastersky, the lawyer for the Connecticut Interlocal Risk Management Association, the town's insurance carrier. Mayor A. Candy Perez said details of the settlement cannot be released until Roche agrees to it. Roche, of Canton, said Tuesday he could not comment on the settlement because he had not reviewed it with his lawyer yet.

Roche's complaint was first filed with the state Commission of Human Rights and Opportunities in April 2009, two months after he resigned from the fire department because of a "hostile" work environment. Roche claimed Griffin called him a "dirty Puerto Rican" in 2008. Griffin has denied making any racial epithets about Roche.

On April 12, a human rights commission investigator found there was reasonable cause that a discriminatory practice had been committed. But three days later, the commission dismissed the case after approving a request for "a release of jurisdiction," which authorized Roche to commence a civil action.

Roche said he withdrew his complaint because the commission was taking too long to make a decision. He had two years from the filing of his original complaint to sue. Roche first filed his lawsuit in Litchfield Superior Court on April 29, but on May 26, withdrew it from there and filed it in federal court.

# Internet – Newspaper Archives Searches Dale L. Martin

(Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to Dale L. Martin is listed below.]

Republican-American (Waterbury, CT) June 20, 2011

#### **Local News**

Author: Kurt Moffett

A weekly look at insider political news and views from around the region.

#### Winsted

No deadline on recriminations over when audit information due

It's been a game of "he said, she said, he said" when it comes to Winsted's audit for 2009-10. Representatives of the school board, town officials and the town's auditing firm, BlumShapiro of West Hartford, met with state officials from the Department of Education and Office of Policy and Management (OPM) on June 8. The town is the only municipality in the state to not submit its audit for 2009-10; it was due Dec. 31. The town has sought six extensions of the deadline.

Town Manager **Dale L. Martin** sent a scathing letter to the state after hearing School Business Manager Paul R. Petit and his assistant, Diane Gieseking, tell the Board of Education on June 14 that they were to get their work done "as soon as possible" so that BlumShapiro could finish the audit by July 15.

**Martin** was under the impression that Petit and Gieseking needed to complete their data entry by June 10 and provide that information to the town by June 13. It was under those conditions that BlumShapiro could get its work done by July 15.

On June 17, W. David LeVasseur, undersecretary for OPM's Intergovernmental Policy Division, sent a letter to **Martin** and Superintendent of Schools Blaise A. Salerno that stated the school district has until June 24 to enter data into its accounting system and provide certain reconciliations and schedules to the auditor. The town has until June 30 to submit its audit to BlumShapiro and until July 15 to file with the state.

#### Internet – Newspaper Archives Searches Dale L. Martin (Articles are in reverse chronological order)

The Register Citizen March 11, 2011

#### Winchester Selectmen announce town manager hiring

Author: Jason Siedzik

The Board of Selectmen announced the hiring of Linden, Michigan native **Dale Martin** as the new town manager Friday morning. **Martin**, a 15-year veteran of city management work, is expected to start work on April 11. According to Winchester mayor Candy Perez, **Martin** has "extensive experience" as a city manager, having served in the post for eight years in Linden and two years in Davison, Michigan. "His references stated he is good at getting people involved and have been impressed by how much he gets out into the community," Perez said in a press release. "They also spoke highly of his leadership skills and abilities with budgets."

Martin said he interviewed with the Winchester Board of Selectmen on the way to another opportunity in Vermont. The board called Martin back for a second interview, and, as Martin said, "I was really sold by the enthusiasm of the town council." Martin expressed his willingness to involve himself in the community as well. "I like working with the public," Martin said, "so I think there's going to be some exciting opportunities there." Martin's strength with budgetary matters will be well-suited to Winsted in its own battles. The Board of Education were expected to approve a budget proposal Thursday night, but postponed the decision until Friday night due to technical difficulties. Winchester's municipal budget will soon follow.

"I can bring some enthusiasm," said **Martin**, commenting on his economic development background. However, **Martin** faced difficulties of his own in his last post. The Davison city council placed **Martin** on paid leave, with plans to fire the city manager, on July 27, 2010. The council voted 4-3 to sack **Martin** under accusations that the city manager lied to council members, provided "coy answers" and was "more interested in promoting his personal professional resume than serving the city of Davison," according to a report written by George Jaksa of the Flint Journal. **Martin** came directly to Davison after an eight-year stint in Linden.

The meeting's minutes were unavailable on the city's Web site, as the most recent available minutes are from the June 28, 2010 meeting. However, the summary of public comment during the meeting included "many pleas by residents to keep City Manager **Dale Martin**. Forgiveness may be the best and most Christian thing to do." However, the June 28 meeting featured the vote to refer **Martin** to the city's Personnel Committee for further review. Council member Roger Lutze moved to fire **Martin** during the meeting, placing him on 30 days paid leave - which would serve as his advance notice - as well as providing contractually-obligated severance pay. David **Martin** - who is unrelated to **Dale Martin** - moved to amend the motion, removing references to dismissal and not count the 30-day review period as his advance notice. This amendment carried, with Lutze, Jim Hershberger and Davison mayor Fred "Mac" Fortner dissenting. The amended motion passed with one dissenting vote from Lutze.

# **Internet – Newspaper Archives Searches** Dale L. Martin

(Articles are in reverse chronological order)

A petition drive called for the ouster of four city council members, as well as Fortner, just two days after the city council voted to place **Martin** on paid leave. The petitions targeted Fortner, Lutze, Hershberger, David Martin and Matthew Judd. The recall effort began in May 2010, but gained steam after the vote to remove **Dale Martin** from power. David **Martin** was the only one of the five to not be recalled; Martin reportedly opposed firing Dale Martin, but was targeted due to other issues surrounding the city. Winchester, though, could offer a fresh start.

"I was definitely warmed over by the Board of Selectmen," Martin said, "and I look forward to working with them and immersing myself in the community." Perez was aware of the events in Davison, noting that **Martin** was up-front about what had happened. Conversations with colleagues such as current Davison mayor Tim Bishop and Auburn Hills, Michigan mayor James McDonald confirmed that **Martin** was the best fit for the community. "The recall, to me, says a whole lot about the elected officials and perhaps their behavior at the time," Perez said. "During the interviews, we were impressed by his confidence. He had ideas in terms of economic development, and we were impressed by his willingness and past history in terms of being involved in the community."

A United States Army veteran from 1990 to 1994, Martin is a credentialed city manager as a member of the International City/County Management Association as well as the Presbyterian Disaster Assistance National Response team. Martin also served as the village manager for Lexington, Michigan for two years. Perez praised Martin's professionalism, as well as his enthusiasm for the community, as what could be a turning point for Winchester. "He seems like somebody that's going to have a lot of energy, work with all the commissions, and has wellrounded experience in the communities he's worked for," Perez said. "This is an opportunity for Winsted to have someone come in that the entire Board of Selectmen wants to be successful and wants to stop our two-year revolving door."

### **Section 6**

#### Internet – Newspaper Archives Searches Dale L. Martin (Articles are in reverse chronological order)

The Flint Journal September 2, 2010

**Ex-Davison city manager pushes programs to consolidate city and township services** Author: George Jaksa

He is no longer city manager, but **Dale Martin** still is working to consolidate services between Davison and Davison Township. **Martin** was a prime mover in the groundbreaking proposed collaboration between Davison and Davison Township on municipal programs before the Davison City Council took steps to oust him as city manager in July.

Despite being stripped of his title, **Martin** said he is talking with state legislators about adopting laws that will help the city and township consolidate services. "I am still working on it with the hope of implementing some changes," he said in a wide-ranging interview this week, as he began a three-month severance after being let go by the Davison City Council on July 26. "We have to keep working on it. It's not just a Davison issue," said **Martin**, pointing to financial strains facing many municipalities in the state.

More than 80 people from the city and township met in a two-day June symposium to brainstorm ideas for improving local services to save costs. They came up with guidelines and left it up to a grass-roots initiative to pursue a number of ideas. Finances led to **Martin**'s downfall after more than two years on the job. On a 5-2 vote, the council put **Martin**, 46, on a month's leave with pay with the intent to fire him. Some council members accused **Martin** of lying to them, being evasive and not following instructions. **Martin** didn't answer the charges directly but said Monday he knew his job was in jeopardy when Matthew Judd; David Martin, no relation to him; and Roger Lutze were elected last November as Mayor Pro-Tem Keith Flewelling and veteran Councilman Ron Emery, both **Martin** supporters, were defeated. Another supporter, Joy Murray, did not seek re-election.

Except for David Martin, the newcomers joined Mayor Fred (Mac) Fortner and Councilman Jim Hershberger, who had not seen eye to eye with **Martin**, in firing **Martin** on a 4-3 vote. The council and city manager tangled over raising water and sanitary sewer rates. The council voting 5-2 on a less stringent rate increase that led to tapping the general fund for about \$400,000 to make up the difference between costs and charges to users. The move led to layoffs, job eliminations and other service cutbacks. "It's just part of the business," **Martin** said of his departure. "Don't feel sorry for me. You really need to feel sorry for the city. "I am a mercenary city manager. I move from community to community," he added. "I feel sorry for the residents. "The city government is a mess right now."

He accused the City Council majority of putting politics ahead of good governance. "They are more interested in controlling instead of governing," **Martin** said. "There is no bridge between the two sides," he said of differences between the majority and minority members, Mayor Pro Tem Tim Bishop and Don Csutoras. "There's a chasm between them."

# **Section 6**

# Internet – Newspaper Archives Searches Dale L. Martin

(Articles are in reverse chronological order)

Fortner said the council's main objective is to get a realistic city budget for Davison. "We're not interested in controlling," Fortner said. "We are interested in getting a budget and everything in place that looks to the public's best interest. "Being a visionary is nice, but we have to take care of the budget first," he added. "Citizens deserve the services but that we get back to a livable type budget."

Davison police Chief William Brandon is serving as temporary city manager until a replacement for **Martin** is named. **Martin** said he is sending out resumes from Maine to Alaska and has had recruiters approach him about his interests. He said the Davison situation has been widely reported. Davison was **Martin**'s fourth stop as a city manager. He started in Lexington, a community of 800 residents, where he stayed for two and a half years before moving to the 3,500-member city of Linden for eight and a half years.

# Internet – Newspaper Archives Searches Dale L. Martin

(Articles are in reverse chronological order)

The Flint Journal March 27, 2010

#### **Davison City Council gives mediocre marks to manager**

Author: George Jaksa

City Manager **Dale Martin** admits he has work to do after getting a lukewarm response on his performance from the City Council. "There are no surprises to me. I have some issues to work on to make city government more effective," he said on Monday after it became known that his overall approval rating was 52.5 percent, down from 59 percent last year. The council's Personnel Committee crunched the numbers on **Martin**'s performance at a meeting earlier in the day.

"Probably one of the things as a council we need to do is come up with a formal letter to **Dale** on issues that need to be addressed," said Jim Hershberger, personnel committee chairman, at the afternoon committee session. He set a meeting for 10 a.m. April 8 to analyze the results and draft a letter for the council's April 12 meeting.

**Martin**, manager since 2008, was graded on a scale of one to five in 10 categories, with one meaning his performance was unsatisfactory and a 5 meaning he "greatly exceeds standards." He could get as many as 35 points in each category for a total of 340.

The categories and results:

• External collaboration: 22

• Collaboration with council: 14

• Overall collaboration: 15

• Planning and organizing: 17 (with no grade from one councilman)

• Completes assignments of council: 16

• Personal communication: 24

• Communication with public: 22.5

• Policy facilitation: 15

• Resource and financial management: 17

• Staff and employee development: 16 (with no grade from one councilman)

Councilman Dave Martin, who was among three councilmen elected for the first time in November, said part of the reason for lower scores for the manager could be perceptions councilmen come away with after brief encounters with **Dale Martin** and staff." The weakness sometimes in on the part of council members," he said. "It's a two-way street," the manager answered.

In response to one councilman's comment about secret meetings leading up to the public disclosure of merger talks between the city and Davison Township, Hershberger said **Martin** could have been "more upfront with everyone." "That's one thing that stuck in my craw," he said. **Dale Martin** acknowledged that the process could have evolved differently and said he and

# **Section 6**

#### Internet – Newspaper Archives Searches Dale L. Martin (Articles are in reverse chronological order)

the council need to work together. "We are going to have a lot of challenges here," he said, "We need to continue to work together because there are a lot of challenges facing all of us."

Two former city councilmen praised **Martin** in remarks before the entire council. Ron Emery, who said he served under three city managers, said he was impressed by **Martin**'s enthusiasm and availability to the public. He said **Martin** has gone to restaurants to set up a table to answer questions "but nobody shows. It's not that he is not available." "He's doing a good job. He is dedicated to this council," he said. "Mr. **Martin** has done a wonderful job to improve the city. He's doing a great job, added Kevin McKeague, another former councilman.

# **Section 6**

# Internet – Newspaper Archives Searches Dale L. Martin (Articles are in reverse chronological order)

Davison Flagstaff, The (MI) August 30, 2009

Cooperation is the key Author/Byline: Dale Martin

Davison's economic development depends on partnerships.

The cooperative efforts of the City and Davison Township continue to gather momentum. I still believe that the level of cooperation between the two governments is unmatched, not only in Genesee County, but anywhere in the state. Several projects illustrate these efforts.

While the combined application of the township and the city for federal funding of the M15 Heritage Trail (first phase: Lippencott Road to Lapeer Road to Alger Road to Clark Street to Main Street) has yet to be awarded, another trail has formally linked the communities. Davison Township acquired a tract of land formerly owned by Consumers Energy. A new trail has been added to this land, stretching from Gale Road east to the western limit of the Abernathy Regional Park. The city will be extending the trail to link with an existing trail within the park.

Additionally, once the township completes a final link along Gale Road later this year, a complete trail network will extend from Davison Township Hall into the Abernathy Regional Park. With the existing sidewalks outside of the park, it will be possible to travel by foot or bicycle from city offices to township offices, adding a physical tie between the governments, reflective of the bond of the entire Davison community. I hope that you take the opportunity to explore the trails and improve your health and appreciation of your community.

In an effort to spur economic development, the township and the city jointly contracted with Buxton, a retail consultant based in Fort Worth, Texas. The township and the city selected two sites on which to focus potential retail (re)development: State Street and Flint Street within the city and Lapeer Road and Irish Road within the township.

After determining some area characteristics, representatives of each government selected 10 retailers who, in other areas with similar characteristics to Davison, had demonstrated profitable success. The retailers include restaurants, department stores, clothing stores, furniture stores and pet shops.

We will begin to court these 20 retailers to set up shop in our town. It will be a lengthy process, and we hope the community will support the recruiting efforts and then the new businesses. Please do not forget to support the current existing businesses, either. The local businesses play a key role in our exceptional quality of life.

The city and the township, in conjunction with the Davison Community Schools, have also embarked upon renewing the area's five-year recreation plan. As a former participant, representatives of Richfield Township have been invited to rejoin the Davison Community

# **Internet – Newspaper Archives Searches** Dale L. Martin

(Articles are in reverse chronological order)

Enrichment and Recreation. The updated plan is necessary to apply for state and federal grants to improve and add to our existing recreational facilities. The plan, with the assistance of The Spicer Group, will take about six months to complete.

Other opportunities for more joint efforts are on the horizon. I have initiated discussions with Oakland University (after the University of Michigan-Flint declined) to conduct a communitywide survey. This survey will seek the input of all residents regarding a variety of issues, such as government services, recreational desires and budget priorities. While first contemplated for only the city, I have asked township leaders to consider participating in the survey and include township-related issues for their residents. I expect the survey to be developed over the next few months, with the distribution and compilation to be completed by late spring. For a sample of the type of questions I expect to ask, please visit the City of Flushing's Web site; the results of its community survey have been recently posted.

Several residents and leaders have inquired about combining various governmental functions. The governments already operate an area Fire Department and a Senior Citizen Center and jointly fund the library and recreational programming. It has been suggested that the city and township Planning Commissions meet on a semiregular basis in order to coordinate future development in the area. Perhaps more services or programs can be examined in an effort to reduce costs as tax revenues and property values decline. I understand that some consolidated efforts were examined and rejected years ago, but perhaps it is time for a second look. With the economy faltering, we should take this opportunity to be a "petri dish" of ideas to enhance our quality of life and redefine government.

The efforts of the current legislative boards (the City Council and the Township Board of Trustees) should not be overlooked. It is the members of those boards who have been willing to develop and fund a vision for the future of the Davison community. The entire community should be aware of and get to know those leaders. I am honored to work directly with the members of the City Council to implement their goals and to work indirectly with the leaders of Davison Township in an effort to develop the Davison community.

**Dale L. Martin** is Davison's city manager. Reach him at (810) 653-2191 or www.cityofdavison.org.

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# Internet – Newspaper Archives Searches Dale L. Martin

(Articles are in reverse chronological order)

Davison Flagstaff, The (MI) November 16, 2008

#### Manager meets council's expectations

Author: Amy Mayhew

At its meeting Monday, the City Council presented **City Manager Dale Martin** with a sixmonth review. Council members agreed that **Martin** is meeting their expectations and is doing a good job for the city.

**Martin**, 45, began his duties as manager on April 18. In the past six months, he has accomplished some short-term goals, including the upgrade of the city's Web site. In the next six months, **Martin** said he will begin working on some long-term goals. **Martin**'s annual review will be conducted next April.

# **Section 6**

# **Internet – Newspaper Archives Searches** Dale L. Martin

(Articles are in reverse chronological order)

The Davison Journal April 3, 2008

#### **Davison Council selects new city manager**

Author: Monica Dufour

The city council unanimously selected **Dale Martin**, former city manager of Dowagiac, Mich., as the new city manager last Saturday. Of the six candidates who had been gathered through a search performed by Bill Richards of the Michigan Municipal League, the council narrowed the candidates down to Martin and Eric Weiderhold, city administrator of Genesco, Ill. Several council members were impressed with both of the candidates. After about an hour of discussion, the council united with their decision on Martin. "This pool of candidates was quite different from our first pool," Councilman Ron Emery said of the six candidates. "This second go-around produced these candidates met our requirements. In my opinion, our best fit would be candidate number one (Martin)."

Emery said Martin hit many points he was looking for in a city manager. "Some of the comments he stated that really worked for me was the first office inside city hall. No clerk, no counter." Martin is strong on downtowns, Emery said. "He likes Genesee County." Emery said Martin gave clear concise answers. Davison City Councilmember Keith Flewelling agreed with Emery that Martin was the candidate for the job. He also recommended Eric Weiderhold as his second choice. Councilmember Jim Hershberger said he thought Weiderhold was the best candidate. "Number six kind of wowed me."

Mayor "Mac" Fortner said he was happy with the decision for a second manager search. "I really felt all candidates seemed to be good. You could just feel the atmosphere." The city council heard from six candidates: Martin; Weiderhold; Gary Rawlings, village manager of Dexter Mich.; Reid Charles, city manager of Mt. Morris; Darcy Long, town manager of Markle, Ind., and Timothy Smith, former town manager of Wellfleet, Mass.

Martin's job offer will be complete after a comprehensive background evaluation, term of employment negotiation with council's legal staff, and passing a pre-employment physical. Richards said Martin informed him that if he were to be selected, he was leaving for a vacation in Mexico and would not be able to be reached for about a week.

# Internet – Newspaper Archives Searches Dale L. Martin

(Articles are in reverse chronological order)

Southbend Tribune September 12, 2007

Dowagiac council ousts city manager Official says Dale Martin's management style wasn't a good fit.

Author: Lou Mumford

Dale Martin lost his job as Dowagiac city manager because his management style wasn't a good fit, a city official said. Mayor Pro Tem Wayne Comstock commented on Martin's departure after the City Council voted Monday night to exercise a buyout clause in Martin's contract. "Mr. Martin was a good and successful city manager in his prior positions. However, the Dowagiac City Council does not feel that Mr. Martin's management style is a good fit for the city of Dowagiac," Comstock said. "We feel that it's best for Mr. Martin and the city that the council exercise the buyout option in Mr. Martin's contract."

The option allowed the city to cancel **Martin**'s contract at the end of six months by paying him a sum equal to six months of his salary and benefits. When he was hired in March, city officials set his annual salary at \$90,000. Mayor Don Lyons said in a prepared statement the fact **Martin** didn't work out in Dowagiac doesn't mean he won't find success elsewhere. "We wish Mr. **Martin** all the best and are confident that in a setting more similar to what he was familiar with, that he will make an excellent city manager," Lyons said.

Assistant City Manager Rozanne Scherr will serve as interim city manager until a successor to **Martin** is located. The search for a replacement is expected to take three to six months. **Martin**, 43, previously served eight years as city manager in Linden, Mich. He was among more than 30 candidates for the Dowagiac job. **Martin** took the place of Bill Nelson Jr., who had served 10 years as Dowagiac's city manager. Nelson resigned to become city manager of Miamisburg, Ohio.

#### Internet – Newspaper Archives Searches Dale L. Martin (Articles are in reverse chronological order)

Southbend Tribune April 15, 2007

New city manager cheers on Dowagaic

Author: Carol Draeger

**Dale Martin** is a former Army officer, a father of four (including twins), an avid game board collector (he owns 300) and big-time believer in historic downtowns. Recently **Martin** added two downtown addresses to his biographical record: city hall, where he serves as Dowagiac's newest city manager. And a refurbished apartment that **Martin** calls home until his family arrives from Linden, Mich., later this summer. "It's half a block away," **Martin** said of his apartment. "I can't blame being late for work on traffic," the 43-year-old said with a laugh. On Monday, **Martin** will begin his fourth week as Dowagiac's leader.

Since taking over the city's reins March 26 from former City Manager Bill Nelson Jr., Martin has been meeting with business, government and school leaders. Martin predicts that during the next few months he will continue to assess the city as he learns its geography and meets with residents. The goal, he said, is to determine how to best use his community development strengths. Martin was Linden's city manager for eight years. The city of 3,600 residents, 15 miles south of Flint, is nearly twice as small as Dowagiac. Residential properties make up the bulk of Linden's tax rolls along with a smattering of small businesses. Martin believes Dowagiac's triple attractions, from its bustling businesses along historic Front Street to its airport and train station make it a magnet for growth. "This could be a diamond in the rough," Martin said of Dowagiac's potential. "We have a 4,700-foot runway capable of handling jet aircraft," Martin said, adding that the train station could also be tapped for future growth. "Is there a way to use those two transportation assets to draw more people and businesses to the city?" Martin wondered aloud during a recent interview with the Tribune.

The airport, he noted, is relatively inexpensive to operate. **Martin** said he would like to attract new businesses to the city's half-full industrial park and plans to meet most of the city's business owners. Last week he toured National Copper Products, met with Dowagiac's superintendent and helped judge a traffic safety poster contest. Dowagiac's growth potential and its well-kept downtown, alive with new shops and restaurants, made Dowagiac a strong lure for **Martin**. "I'd like to think that I couldn't work in a city that didn't have a great downtown," **Martin** said. "I'm a traditional believer in the allure of historic downtowns," he said. That passion is what propelled **Martin** to the top of the hiring stack. "What we liked about **Dale** was what I call his gut-level enthusiasm for small-town America," said Mayor Don Lyons. **Martin**'s skills mark a departure from Nelson, whom Lyons applauded for his "perfect" professionalism and accomplishments. "Mr. **Martin** is going to be more of a cheerleader," Lyons said.

#### Internet – Newspaper Archives Searches Dale L. Martin

(Articles are in reverse chronological order)

Tri-County Times April 26, 2006

#### Linden approves manager's goals

Author: Anna Troppens

Linden City Manager **Dale Martin** has his goals for the coming fiscal year. City Council approved the goals on Monday, which will provide them with a way of evaluating **Martin** for his annual personnel review. "This is good stuff," Councilor Ray Culbert said. **Martin** will give the council periodic updates on how he is achieving the goals. City officials can develop it as the year progresses, Mayor David Lossing said.

#### Martin's professional development goals include:

- \* Maintaining certification as a professional emergency manager, through the Michigan State Police.
- \* Completing three (one per quarter) online Citizen Planner courses, through the Michigan State University Extension.
- \* Submitting an application for credentialing by the International City/County Management Association (ICMA).
- \* Obtaining a formal leadership position within the Michigan Local Government Management Association/Michigan Municipal League (MLGMA/MML).

#### Staff development goals include:

- \* Revising the city's emergency management plan.
- \* Conducting weekly staff meetings.
- \* Redeveloping the city's Web site.
- \* Having administrative staff meet 100 percent of their goals.

#### Economic development goals include:

- \* Reviewing/revising the Blueprints for Michigan Downtowns implementation schedule.
- \* Implementing the revised Blueprints schedule.
- \* Meeting with nondowntown business owners to establish vision/goals.
- \* Regularly meeting with business owners.
- \* Recruiting three needed businesses/services.
- \* Creating a significant downtown retail event.
- \* Preparing/receiving three successful grant/loan applications.

#### Community development goals include:

- \* Executing the annual Memorial Day picnic.
- \* Executing the Music and Movies by the Mill.
- \* Executing the Summer Games.
- \* Executing the Farmers' Market.
- \* Revising the Parks and Recreation Plan.

#### b.

#### Internet – Newspaper Archives Searches Dale L. Martin (Articles are in reverse chronological order)

Tri-County Times March 7, 2005

#### Linden city manager receives annual evaluation

Author: Anna Troppens

The Linden City Council gave Manager **Dale Martin** a positive annual evaluation at Monday's meeting. Each of the six councilors and Mayor David Lossing completed an evaluation form, rating **Martin**'s personal and professional qualities in several areas. They awarded him ratings of 1-3, with one being low and three being best, Lossing said. **Martin** received a 2.63 for personal qualities and a 2.61 for professional qualities when Lossing compiled the results.

Although he had the choice of receiving his evaluation in closed session, **Martin** elected to have the council discuss it in public. His evaluation is a factor in his annual salary, which currently is \$62,436, he said. In addition, he receives 7 percent of the amount of his salary deposited into a retirement plan and reports \$5,000 per year additional income on his income taxes from the \$25,000 the council awarded him for a new vehicle after last year's evaluation.

Martin has worked for the city of Linden for 61/2 years. Councilors Ray Culbert and Edward Ciesielski were on the council when he was hired. Ciesielski described Martin as very innovative, a visionary and a very good fit for the city. He also said Martin needs to make a better effort in coordinating the work functions of different departments. Culbert agrees Martin is a good fit for Linden. "I believe Dale thinks it's a good fit, too. Dale has had other opportunities, and he has decided to stay here," he said. "I'm happy you're our city manager, Dale. I'm very pleased with you."

He said **Martin** does a fantastic job for Linden. This doesn't mean he and the city manager always agree, but they've always been able to find a point of view or a consensus they can agree on. "It's been a great 61/2 years," Culbert said. "I also think in his tenure he has matured into the job." In addition, he said **Martin** has grown in developing plans and following through with them. He believes this is one of his greatest improvements. **Martin** has always been good at securing grants and funding, including the federal grant for improvements on Ripley Road the council discussed earlier in the meeting, he said. Culbert also said **Martin** has grown in the area of obtaining input from city employees and councilors. As a goal, he wants the city manager to help develop downtown business growth plans.

Councilor Diane Eldred said she is at the low end of the council's evaluation of **Martin** again. She believes there is always room for improvement for everyone. She wants **Martin** to be stronger with some of the departments he manages, making them responsible and follow through. Eldred praised his communication skills, especially with councilors. She can call him with questions and have an answer or solution in a short time, she said.

Councilor Graham Morgan said he also rated **Martin** on the low end compared to the other councilors. He has had many conversations with **Martin** and likes his imagination the most.

# Internet – Newspaper Archives Searches Dale L. Martin

(Articles are in reverse chronological order)

Martin just doesn't say no, but tries to think about issues from all sides. Martin could delegate more and use the talents that are available in the community from citizens who serve on committees, Morgan said. Councilor Patti O'Dwyer said she's enjoyed working with Martin, and that he always has time to talk with the public and councilors. He also is always polite and courteous, she said. But she is very disappointed in the enforcement of ordinances in the city, O'Dwyer said. If it requires getting someone else to enforce them, she believes it is something the council should look at.

Lossing said, as mayor of the city, he deals with **Martin** almost on a daily basis. He said he knows how hard **Martin** works on behalf of Linden. Lossing listed one of his goals for **Martin** as hiring a zoning administrator for the upcoming budget year. In addition, based on the work for the Blueprints for Michigan Downtowns program, Lossing believes the city should consider either an assistant city manager position or economic development position. This person could assist in business recruitment and retention, in conjunction with the Principal Shopping District and Linden-Argentine Chamber of Commerce.

Martin said the council's evaluation is very fair. He would grade himself a little more harshly than the council did. The past year didn't seem to have the flow to it that his first five years in Linden did, he said. He wants to get himself and city staff more focused, and provide some direction on long term goals for Linden. "We lost our focus a little bit in the office," Martin said. "At least I didn't have as great a focus in the last year." He said he enjoys working in Linden and has no intentions of leaving. "I enjoy working with all of you, and I enjoy going to work every day," Martin said.

Culbert said **Martin**'s evaluations have been pretty consistent through the years, and the numbers don't wobble much. In addition, he hears lots of very positive comments about **Martin** and the city staff and the job **Martin** does. The council unanimously accepted its evaluation of him.

b.

# **Section 6**

#### **Internet – Newspaper Archives Searches** Dale L. Martin (Articles are in reverse chronological order)

tctimes.com March 12, 2004

#### Linden city manager receives raise, loan

Author: Anna Troppens

Along with a 6 percent increase to his \$58,902 salary, Linden City Manager **Dale Martin** will receive a loan of up to \$25,000 for purchasing a new vehicle. City Councilors Tom Brady, Ray Culbert and Diane Eldred served on the committee that made the recommendation. Their recommendation was approved by a 6-0 vote, following Martin's personnel evaluation by the entire Council in February. The loan will be for **Martin** to buy a vehicle in his own name for his personal use, City Attorney Charles McKone said at Monday's Council meeting.

Martin is to pay back the loan from the city's general fund over a five-year period. The interest rate on the loan is 3.5 percent. If he leaves the city of Linden, voluntarily or involuntarily, he will still be responsible for paying back the loan. Martin will be reimbursed for travel expenses for city business as he currently is. The city manager said he plans to buy a new type of Ford vehicle that will go on sale in August or early September for an estimated \$25,000 to \$30,000. He has a family member employed by Ford Motor Company, so he is eligible for a discount on the vehicle's price. He said his current vehicle, a 1991 Chevy Blazer, is "an old rust bucket." The automobile he plans to purchase has a station wagon style. "It gives me additional incentive to stay here, which I already had," Martin said Tuesday. "This adds to my desire to stay in this community." He has been city manager of Linden for 5½ years.

Culbert said the committee made its recommendation based upon Martin's high level of consistent performance. The annual principle due on the loan, and accrued interest on it, will be waived if Martin continues to be city manager in Linden for the five years of the loan. The loan will not set a precedent for Martin or any other city manager, Culbert said. McKone will bring the loan agreement back for Council approval and Mayor Jim McIntyre's and Martin's signatures. Councilors praised the salary committee for their innovative way of compensating Martin. "I hope someday we'll have to pay him a retirement because he stays that long," Councilor Edward Ciesielski said. "I don't know if we could find someone to replace Dale with the money we pay him."

#### b.

# Internet – Newspaper Archives Searches Dale L. Martin

(Articles are in reverse chronological order)

Tri-County Times April 24, 2003

#### Linden remains in good financial condition

Author: Heather Clement

According to City Manager **Dale Martin**, the primary cause for the reduction is due to the timing of the financing for the city's road projects. And, as is the case in many other Michigan communities Linden is feeling the pinch because of Proposal A (Headlee Amendment), which will cause the city's tax rate to go down by 1.66 percent, while operating expenses continue to climb. Although Linden's charter calls for a maximum levy of 13.5 mills, the estimated maximum levy in the next fiscal year will be 1.4592 mills. Last year, the levy was 11.6526 mills. But in general, **Martin** says the city remains in good financial condition, despite the significant expenditures.

Some of the projects to be budgeted for the next fiscal year include, a boardwalk at the end of Walmar Street which will be paid with a low interest loan of \$100,000. The remaining \$250,000 to come from a state of Michigan Natural Resources Trust Fund Grant. Other projects will include a downtown parking lot on the east end of downtown, improvements of city hall, paved roads within the cemetery and painting of the new wrought iron fence surrounding the cemetery. The mill building that houses both the library and council chambers will receive a heating and air conditioning system.

There will be a new lighted brick sign which will be posted at the entry of Linden and will include electronic capabilities to highlight up and coming events in the Linden area. The sign will also include space for local organization signs. New equipment for Linden will include the purchasing of a new backhoe, which is a" good buy for the money," said Department of Public Works Director Jim Letts. The police department will receive a new police cruiser. **Martin** said the city budget allows for three new police cruisers every four years.

Other issues on the budget included the mosquito control levy, which will be going on the ballot this year. "We saved up enough money that we didn't have to levy it this year, **Martin** said. "It has to go on the ballot because we want to adjust the amount."

Members of the City Council praised the effort **Martin** and Treasurer Gloria Kirshman put into the proposed budget. "You guys do a bang up job," said Councilor Ray Culbert. A public hearing on the 2003-2004 fiscal year budget will be held on Monday, April 28 at 7 p.m. in the City Council chambers. Residents will be allowed to voice their concerns over the budget at that time. The Linden City Council is expected to vote on the budget on Monday, May 5.

#### b.

# Internet – Newspaper Archives Searches Dale L. Martin

(Articles are in reverse chronological order)

Flint Journal, The (MI) February 25, 2003

Linden: City manager receives favorable review

Author: Robert Snell

City Manager **Dale Martin** received a favorable review during his annual evaluation, which was discussed Monday during the City Council meeting. A City Council wage committee will meet and decide a possible raise for **Martin**. A decision could come at the city council's March 10 meeting.

Martin is adept at obtaining grants and keeps the council informed, council members said. He is prepared, communicates well and is aggressive. But he over-emphasizes downtown businesses at the expense of other merchants and needs to listen more to community members, according to the evaluation. Martin, hired in 1998, is evaluated every year. Council members also listed long-term goals for Martin. They include developing the downtown, building sidewalks and improving roads.

#### b.

# **Internet – Newspaper Archives Searches** Dale L. Martin

(Articles are in reverse chronological order)

The Flint Journal January 17, 2003

Linden: City manager picked for leadership program

Author: Robert Snell

City Manager Dale Martin received a political leadership fellowship from Michigan State University's Michigan Political Leadership Program. Martin, who was picked from a pool of more than 100 candidates, will attend the program from February through November. Martin and 23 others will participate in a 10-month curriculum on practical politics, public-policy analysis and process, personal leadership development and effective governance. The fellowship is valued at \$12,000.

Martin, Linden's city manager since 1998, will participate one weekend per month for 10 months. Events include an insiders look at the White House with presidential adviser Karen Hughes and Dee Dee Myers, former press secretary to President Bill Clinton. Prior to coming to Linden, Martin served as Lexington's village manager and served in the U.S. Army. He is the father of three.

#### b.

# Internet – Newspaper Archives Searches Dale L. Martin

(Articles are in reverse chronological order)

Flint Journal, The (MI) February 27, 2002

Panel gives manager high marks City Council grades aide above average

Author: Chad Swiatecki

City Manager **Dale Martin** got a pat on the back from the City Council during his annual performance evaluation Monday. In slightly more than three years running the city, **Martin** has grown into a valuable leader who works well with employees and residents and balances major capital projects with day-to-day operations, council members said. "**Dale**'s evaluation (rating) has grown each year, and I felt **Dale** has matured a lot in that time," Councilman Ray Culbert said. "He's well-respected, even if we don't always agree with everything he thinks, but he seeks creative solutions to complex problems."

Using a scale of one to three, with one meaning improvement is needed and three meaning above average, the council rated **Martin** on eight personal qualities including achievement and drive, appearance and self-control. They also assessed 15 professional qualities, such as communication, competence, attitude, leadership and innovativeness.

**Martin**'s average score for both sections was a 2.5 - halfway between acceptable and above average - with his highest marks coming from supportiveness, achievement and drive, attitude and preparedness. His low marks were in community relations, managerial skills, appearance and ability to delegate tasks. Councilwoman Diane Eldred, who gave **Martin** the lowest marks, said **Martin** has done a respectable job but has to focus on improving the city. "I'm probably the hardest of anybody up here, but a three (rating) suggests that they're perfect, and there's no one that's perfect," she said. "Some areas he did well in and some need improvement, but there's room for improvement in all of us."

Martin credited the city staff with helping him manage such projects as the reconstruction of E. and W. Broad streets and the success of such attractions as the Music by the Mill program. "There are areas where I think I think I can improve also, and a lot of what we accomplish in the city is due to our staff as a whole," he said. "I look forward to working with everyone on more projects this year to enhance the city." After the evaluation, Mayor William Rose and council members David Lossing and Ed Ciesielski were appointed to review Martin's contract for next year.

## Internet – Newspaper Archives Searches Dale L. Martin

(Articles are in reverse chronological order)

Tri-County Times (Fenton, MI) February 28, 2001

#### Martin earns high marks from Linden City Council

Author: Staff Writer

Linden - City Manager **Dale Martin** scored high marks in his performance evaluation. With 3 being the highest, **Martin** received an overall score of 2.5. Various personal and professional qualities were considered for the evaluation. **Martin** scored "acceptable" and "above average" in the final average in all categories.

High marks were given by the councilors in areas such as verbal fluency, attitude, supportiveness, decision-making ability and managerial skills. "No one is perfect," said City Councilor Diane Eldred who said she was perhaps the hardest on **Martin** when evaluating his performance. Overall though, she said she thought **Martin** does a good job, but added that some improvement is needed. "**Dale** is diligent in the direction we want to go with the city," said Councilor Edward Ciescielski.

Councilor Ray Culbert said **Martin** has matured a lot and is very well respected by the council and the city employees. "He seeks creative solutions to complex problems," said Culbert.

Mayor William Rose said some of the lower marks will only help **Martin** continue to grow. He added that **Martin** is one of the best city managers the city has had. Some of the strengths noted in the evaluation for **Martin** are his flexibility, innovative ideas, organizational skills, initiative and creativity in securing funding.

Maintaining good relations with staff and city employees and his willingness to work long hours are also noted as strengths. Some weaknesses noted are in the area of communication such as listening to hometown residents and slow response time to citizens' complaints. **Martin** said he is aware that there are areas he could improve. "I'm looking forward to more projects," said **Martin**. He attributes much of his success to his staff. "We have an exceptional staff," he said. "It is not possible without them."

# **Internet – Newspaper Archives Searches** Dale L. Martin

(Articles are in reverse chronological order)

Flint Journal, The (MI) May 7, 2000

# SIGNS OF BROAD STREET RECONSTRUCTION POP UP IN AND AROUND LINDEN

Author/Byline: Elizabeth Shaw

The first sign of spring is up just before the city limits - and it's proclaiming "Construction Work Ahead" in brilliant orange. The sign sits where Silver Lake Road becomes E. Broad Street at Linden's eastern boundary. All along the 1 1/2-mile stretch from Ripley Road west to downtown, yellow-flagged stakes indicate where workers will begin digging trenches this week for underground utilities.

It's the first step in the \$2.5-million E. Broad Street reconstruction that City Manager Dale L. Martin described as "the largest project in the city's history." Residents in a special assessment district along E. Broad Street will pay \$371,000, or about \$5,000 a lot, over 15 years to fund the project. The city will pay \$428,300, and more than \$1.2 million in federal funds will pay the remainder. In addition to road resurfacing from Ripley to Bridge Street, the improvements will include new curbs and sidewalks from Main Street east to High Street, then south around the cemetery and east to Ripley Road.

The route will remain open during this initial phase of storm sewer and water main installation from May 15 through July 29, according to the project timeline supplied by Genoak Construction of Holly, contractors for the project. After that, through-traffic will be detoured north on Ripley Road to either Tickner Street or Rolston Road, then south on Bridge Street to the downtown area. Genoak plans to keep the route open to local traffic throughout construction if possible. The work should be completed by November. The project has been in the works for nearly three years and is part of a planned effort to enhance Linden's historic downtown, City Council member Ray Culbert said. In addition to the road improvements, the city is working to expand its downtown historic district to allow many of its older homes to qualify for state tax credits for historic renovation. "Improving the roadways combined with the ability to make our homes more attractive will be the best way to keep downtown Linden from becoming just another commercial strip like you see in so many other communities," Culbert said.

The sidewalks and curbs will completely change the look of the city's eastern entry, Culbert said. "I've been very pleased with residents' comments. They know it's really going to help their conditions out that way, make it more attractive and help their home appreciation," he said. "Also, the amount of federal and city money we've been able to bring to this project has really lessened the burden on our people. It's a great project for a little city like Linden." In addition to the road project, the city has allocated \$10,200 of its 2000 federal Block Grant funds for the ongoing Downtown Revitalization Plan. The project includes street lighting, benches, trash receptacles and landscaping throughout the downtown district. The first half of the work will be completed by July, with the entire project finished by December 2001.

# Internet – Newspaper Archives Searches Dale L. Martin

(Articles are in reverse chronological order)

Flint Journal, The (MI) September 20, 1999

#### RESIDENTS HOPE TO ARM THEMSELVES WITH INFORMATION

Author/Byline: Elizabeth Shaw

As it was for many of the dozen or so people who gathered in the city council chambers beneath Linden Mill last week, Peggy Wharton's reason for joining the first Linden Citizens Academy was a simple one. "I've lived here for 55 years. I raised my kids here and my grandkids will be raised here. And I've never had a clue who's running the show," Wharton said Thursday as the academy opened.

For the next two months, that is exactly what City Manager **Dale L. Martin** hopes to teach in a series of classes on local government inspired by the widespread popularity of citizens police academies. Anyone who completes the series of six classes will receive a certificate of recognition at Linden's annual Government Day dinner in May.

**Martin**'s rationale is that an informed public will be an involved public. "When we adopted this year's budget, we held three public meetings and not a single resident came. Only 35 people responded to the survey we mailed to every address in town. If a council is dependent on public input to make decisions, what do you do if there's absolutely no input?"

Mayor William G. Rose agreed, adding that residents also need to understand why change, like road improvements, is necessary to a growing community. "We're in a time of transition right now. We've got to get ready for the growth we're going to experience because of the quaintness and rural nature of our community. It will be a struggle, but if we can work together hopefully we'll end up with the kind of community we're all still proud to live in," Rose said.

Both are hoping the Citizen's Academy and similar projects will foster a community vision and inspire ideas such as themed signs for downtown businesses and citywide sidewalks. "The trend nowadays is for urban planners to try to re-create small clusters of community in places like Troy and Southfield," **Martin** said. "We already have it. Let's promote and protect the community aspect of Linden."

The next class of the Linden Citizens Academy is scheduled for 7 p.m. Sept. 30. Newcomers are welcome to attend.

# Internet – Newspaper Archives Searches Dale L. Martin (Articles are in reverse chronological order

(Articles are in reverse chronological order)

The Flint Journal November 28, 1998

#### New City Manager Takes To Street To Meet and Greet

Author: Jennifer Hrynik

If a man with a closely cropped, military-style haircut comes to your door one evening, don't mistake him for a recruiter. New City Manager **Dale Martin** just wants to introduce himself. "One of the things I stressed when I interviewed for this position is that I really put a lot of effort into my contacts with the citizens," he said. "I want to go and knock on people's doors and introduce myself."

**Martin**, 34, served as a U.S. Army officer before getting into municipal management and previously was village manager for the village of Lexington, Mich. The Warren native started in Linden on Nov. 2. Previous manager Joseph M. Murray left for a city manager position in Greendale, Wis., on May 1. **Martin** said so far the city strikes him as being similar to many small-town Michigan communities: very family-oriented and very friendly. He hopes to bring his perspective and experience as someone with a young, growing family. He and his wife Beth have three daughters, a 5-year-old and 5-month-old twins.

"(The residents) are concerned about the way their community is going to grow because they either stayed here or they moved here because they liked the community environment," Martin said. "And we need to make sure that we keep it that way." Martin said Linden's size - it has about 2,600 residents - is what initially attracted him to the position. After serving two years in rural Lexington, north of Port Huron - population 800 - he was ready to go to a larger community. "(Linden's) a small enough city that I can learn how cities and counties operate in a more urban and interactive environment," he said. "In Lexington, we were on our own because the county was so rural, we had very limited interaction with the county."

After graduating from Alma College with a political science degree, **Martin** did what he calls "the usual political science grad jobs" of retail and waiting tables. Later he headed to Oakland University and received his master's degree in public administration in 1990. Before becoming Lexington's village manager in April 1996, **Martin** served in the U.S. Army as an infantry officer and an intelligence officer. He was stationed in Germany for four years and was open to making it a life-long career. But **Martin** said military life, which kept him away from his family for six to eight months of the year, is in the past. "I had some concerns about the general direction of the Army," he said. "I just felt it was time to get out with the draw-downs and a lot of the political considerations that were going on."

**Martin** said his philosophy as a manager is simply to let the experienced city staff do their jobs. "I am not going to be better at their jobs than they are," he said. "I give them an envelope in which to operate and it's my job to keep them in that envelope or redefine that envelope as issues arise." **Martin**'s first major project as city manager is coordinating reconstruction of Broad

b.

## **Section 6**

# Internet – Newspaper Archives Searches Dale L. Martin

(Articles are in reverse chronological order)

Street, the largest construction project in Linden history. **Martin** is busy planning informational meetings for residents, which should start in late January.

**Martin** said he plans to visit with as many E. Broad Street business owners and residents as possible within the next month. "If I can get a chance to meet them personally so that I'm a familiar face to them then maybe that can help this project move a little more smoothly," he said.

Research Compiled by: Shannon Farr & Tammie Gardner

Colin Baenziger & Associates



# Section 7 David D. Molgaard Belle Isle City Manager Candidate Report

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# Section 7

## **TABLE OF CONTENTS**

|                         | <u>PAGE</u> |
|-------------------------|-------------|
| COVER LETTER AND RESUME | 1           |
| CANDIDATE INTRODUCTION  | 7           |
| BACKGROUND CHECKS       | 15          |
| CB&A REFERENCE NOTES    | 21          |
| INTERNET SEARCH         | 37          |

# Cover Letter and Resume

### DAVID D. MOLGAARD

PHONE: 304.389.2011 244 Whispering Woods Rd
EMAIL: davidmolgaard23@gmail.com Charleston, WV 25304

To the Honorable Mayor Fouraker and Members of City Council

May 5, 2023

City of Belle Isle, Florida

Via email: Recruit24@cb-asso.com

Dear Mayor Fouraker and Members of City Council:

I am excited to express my interest in being the next city manager for the City of Belle Isle, Florida. As an accomplished results-driven professional with over 15 years of experience as the city manager for the City of Charleston, West Virginia, I am confident I have the skills, knowledge, and experience necessary to excel in this role.

Charleston is the largest municipality in the State of West Virginia and, as the seat of state government and commerce, its day-time population swells far beyond its residential population. Consequently, so does the challenges and demand for city services. I am happy to say that I have had a great working rapport with our mayor and city council. We navigated our challenges well together and our performance led to the longest serving mayoral administration in the city's history (four terms).

As Charleston's city manager, I oversaw a general fund budget of \$100 Million, a workforce of 800, and an organization with approximately 30 departments and departmental sub-units. I developed and supported talent from within the organization and together we worked to create efficiencies in service delivery, improve working conditions for our employees, creatively address budgetary cost drivers, advance strategic planning initiatives, and implement impactful public work projects. I sat as the financial advisor to the Charleston Sanitary Board and regularly interfaced with other governments, agencies, and boards to advance our common causes and build cooperative relationships. I served on the legislative committee of the West Virginia Municipal League and held leadership roles, including that of president, in the West Virginia City Management Association, an affiliate of ICMA.

I am educated and trained as an attorney and I practiced law in the private sector before moving into public service. Over the last four years I have been facilitating organizational change initiatives within a private sector law firm in a chief administrative role. I am eager to return to my passion of local government service with a renewed enthusiasm for efficient and sustainable community building.

Additional details about my background are contained in the accompanying resume, but I would welcome the opportunity to discuss my qualifications more fully. Thank you for your time and consideration.

Sincerely,

David D. Molgaard

# DAVID D. MOLGAARD

#### **PROFILE**

Experienced city manager and operations administrator.

Skilled in organizational leadership, budgeting and strategic planning, financial reporting, managing complex funding sources, policy analysis and formulation, contract negotiations, project administration, consensus building and public relations.

Also skilled in proposal development, grant administration, governmental contracting, human resources, employee relations, talent development, personnel supervision and performance evaluation, property acquisition and development, facility amangement, information systems and technology, cost-containment, risk management, and insurance matters.

#### CONTACT

PHONE: 304.389.2011

EMAIL:

davidmolgaard23@gmail.com

LINKEDIN:

linkedin.com/in/david-molgaard-0810559

#### **EDUCATION**

#### J.D., Juris Doctorate

The College of Law West Virginia University 1988

#### M.S., Industrial Labor Relations

The College of Business and Economics West Virginia University 1990

#### B.A., English

The College of Arts and Sciences West Virginia University 1985

#### **WORK EXPERIENCE**

#### Chief of Staff and Firm Administrator Bailey & Glasser, LLP

2019-2023

Recruited to facilitate administrative and organizational change initiatives for a multi-jurisdictional law firm concentrating in complex litigation and corporate transactional work.

Provided business, administrative, and integrative leadership support through a restructuring and period of significant growth for the firm: 70% increase in attorney and staffing levels and the addition of 8 new office locations (from 11 to 19) over four years.

- Oversaw human resource functions, including supervision of department director, office managers, recruitments, on-boarding and training, and welfare benefit plans and procurements (including migration to a high retention captive healthcare plan).
- Supervised paralegals and other non-legal staff; conducted performance and compensation reviews.
- Helped guide and oversee Diversity, Equity, and Inclusion initiatives resulting in Mansfield Rule Certification for Mid-Sized Law Firms.
- Oversaw IT functions: directed Helpdesk and vendor managed IT services; facilitated selection and implementation of case management and document management systems and projects to migrate data from on-prem to cloud-based platforms.
- Developed gap policies and procedures and managed audit activities to obtain SOC 2, Type 1, certification relative to the Trust Services Criteria for Security and Confidentiality for a service organization.
- Negotiated leases and managed office build-outs and set-ups; implemented remote work protocols.
- Performed risk management assessments and activities including procuring appropriate policies of insurance.
- Oversaw training and mentorship programs.
- Trained and served as an Adizes Methodology Integrator.

# REPRESENTATIVE BOARDS & AWARDS

#### West Virginia City Management Association (ICMA Affiliate)

President, Vice President, Secretary/Treasurer

#### West Virginia Municipal League

Legislative Committee Ins. Pooling Project Steering Comm.

#### Charleston Civic Center Board

**Board Member** 

#### Charleston Sanitary Board

Financial Advisor

#### Regional Intergovernmental Council

Kanawha-Putnam Metropolitan Planning Organization/ WV Region 3 Mayoral Board Representative

#### Charleston City Council Ward 5 Councilmember

Committee assignments:

Finance

Rules and Ordinance Employee Relations (Vice Chair) Parks & Recreation

Healthcare Task Force

Task Force on Charleston Housing Watt Powell Park Blue Ribbon Com.

#### Highland Hospital Association, Inc.

**Board Member** 

#### West Virginia Association of Rehabilitation Facilities

**Board Member** 

#### Servant Leader Award

Charleston Area Alliance

#### Caperton Award of Excellence 2014

Awarded for Excellence in Workplace Healthcare and Wellness Initiatives

#### Charleston Main Streets Chairman's Brick Urbanite Award 2017

#### **WORK EXPERIENCE**

#### City Manager City of Charleston, West Virginia

2003-2019

Chief Appointed Administrative Officer serving the state's capital city and largest municipality. Managed a General Fund Budget in excess of \$100 Million with a workforce of 800.

# Provided vision and mission focused leadership with effective organizational management. Representative examples:

- Provided executive direction and oversight to approximately 30 city departments and sub-units; led department head meetings, cross-functional teams, and annual retreats which helped break down organizational silos and facilitated better communication resulting in more efficient and effective service delivery;
- Prepared and presented annual budgets, revenue forecasts, and fiscal reports to the mayor and city council; consistently presented a balanced budget and ended fiscal cycles with carry-over surpluses;
- Consolidated department-wide procurement and grant administration functions which eliminated wasteful spending and conserved resources through bulk-purchases;
- Coordinated master planning initiatives and renovated facilities to create a one-stop-shop for economic development;
- Created a Department of Strategy Management dedicated to researching, evaluating, and recommending intra-departmental efficiency measures for service delivery and inter-departmental cooperation; implemented strategic realignments of duties, responsibilities, and staffing levels;
- Commissioned a compensation and classification study; directed an overhaul of pay structures and redrafting of the Personnel Code; directed implementation of a performance management framework focused on core competencies and professional development;
- Created an in-house construction crew to timely address maintenance and workplace safety issues and to help raise employee morale and productivity by remodeling and revamping dismal and inefficient spaces and working conditions within City Hall and other city-owned facilities;
- Directed the city to a self-insured healthcare program and proactively managed costs and services through a multifaceted approach which included: an in-house wellness center staffed by licensed clinicians; coordination of third-party medical claims and pharmaceutical benefits administrators; negotiated discounts with area hospitals; service relationship with the University of Charleston Pharmacy Program faculty for prescription drug maintenance counseling;
- Regularly interfaced with non-profits, community groups, and represented the city administration before other governmental agencies and boards.
- Led a delegation to Banska Bystrica, Slovakia, to formalize our sister city relationship and develop regional contacts for economic, educational, and cultural exchanges.

#### DAVID D. MOLGAARD

#### Creatively developed financial funding plans and initiatives to meet operational needs and address program priorities.

#### Examples include:

- A new pension contribution methodology which was adopted into state law to arrest and reverse growing trends in unfunded pension liabilities for municipal uniformed services;
- The city's first Stabilization Fund (i.e., Rainy Day Fund) to cover unforeseen budget contingencies;
- Drafted and guided implementation of the city's first City Service Fee ("User Fee") providing funds for a robust paving and street maintenance program and to support police services;
- Proposed and implemented creation of a TIF (Tax Incremental Financing) District and implementation of a new half-cent sales tax to secure funds for the Charleston Civic Center renovation and expansion project;
- Designed and/or implemented Municipal Home Rule initiatives addressing procurement of design services, design-build project delivery, urban deer hunts, on-the-spot citations for building and zoning enforcement, liens on property for repairs to dilapidated structures or sidewalks, relief from certain DNR and DEP permitting requirements, and streamlining the disposition of City property, to name a few:
- A Healthcare Reserve Fund with accumulated reserves in excess of \$9 Million (over one year of budgeted program funding) to meet future healthcare cost contingencies.

#### Accomplished in planning, financing, and implementing successful construction and public works projects. Representative projects:

- Charleston Coliseum and Convention Center Expansion and Renovation Project. \$109 Million Design-Build project funded through Property Tax TIF and Revenue Bonds supported by Citywide half cent sales tax. Substantial completion: Sept. 2018.
- Charleston Ballpark Project. City owned Professional Minor League Baseball Stadium. \$23 Million. Completed April 2005. Construction Manager at Risk delivery method.
- Other notable projects: Haddad Riverfront Park Renovation and Court Street Overlook; City Hall Renovations; City Service Center Build-out (to create one-stop shop for development services); Fire Station Replacement Project; Spring Hill Cemetery Administration and Maintenance Facility (designed and built with in-house crews); Kanawha Trestle Pedestrian and Bikeway Project; Slack Plaza and Brawley Walkway Renovation Project.

#### ADMISSIONS TO PRACTICE LAW

Supreme Court of Appeals of West Virginia, 1988

U.S. District Court for the Southern District of W.Va. 1988

U.S. District Court for the Northern District of W.Va. 1988

U.S. Court of Appeals for the Fourth Circuit. 1994

#### OTHER WORK EXPERIENCE

#### Business Law Adjunct Instructor West Virginia University Institute of Technology

Montgomery, WV

1997-2003 Taught business law survey courses to college students.

#### Lawyer

1988 - 2003

Experienced litigator in private practice with concentration in employment law, administrative law, personal injury, business matters, and insurance matters. (Various firms--available upon request).

Page 6 of 133

# Candidate Introduction

#### **EDUCATION**

| West Virginia University, Morgantown, WV:                         |      |
|---|------|
| Doctor of Jurisprudence (J.D.), The College of Law                | 1988 |
| Master of Science (M.S.) Industrial Labor Relations,              |      |
| The College of Business and Economics                             | 1990 |
| Bachelor of Arts (B.A.) English, The College of Arts and Sciences | 1985 |

#### **EXPERIENCE**

| Chief of Staff and Firm Administrator, Bailey & Glasser, LLP     | 2019 - 2023 |
|--|-------------|
| City Manager, City of Charleston, West Virginia                  | 2003 - 2019 |
| Financial Advisor, Charleston Sanitary Board, WV                 | 2004 - 2019 |
| City Council Member, City of Charleston, WV                      | 1999 - 2003 |
| Attorney in private practice                                     | 1988 - 2003 |
| College Adjunct Instructor, Business Law,                        |             |
| West Virginia University Institute of Technology, Montgomery, WV | 1997 - 2003 |

#### **BACKGROUND**

My most recent employment has been as Chief of Staff and Firm Administrator for a multijurisdictional law firm founded and headquartered in Charleston, West Virginia. I was heavily recruited to facilitate administrative and organizational change initiatives for the firm after serving over 15 years as City Manager for the City of Charleston. This opportunity to step back from public service for a period to hone my business, administrative, and integrative leadership skills in the private sector has given me an opportunity to reflect and gain new and transferable skills and perspectives that I am eager to bring back to local government administration.

Charleston, West Virginia, is the capital city and largest municipality in the State of West Virginia. Sitting at the confluence of three interstate highways and two rivers, Charleston's vision is to be the Cultural, Recreational, and Business Capital of the Appalachian Mountains. The city has under 50,000 full time residents, but it serves a much larger base as its population swells daily with state and service workers and the many visitors it attracts to its governmental, commercial, meeting, and entertainment offerings. Nevertheless, it has managed to maintain its small-town charm through strategic planning initiatives, the hospitality of her people, and the service culture of the 800 employees (18 who reported directly to me as the city manager) who are focused upon being the most efficient and effective municipal organization at meeting the reasonable needs and expectations of core constituents.

When I left the position of City Manager in 2019, Charleston was operating through a General Fund of just over \$100 Million. This did not include the enterprise funds that support the Parking

#### **DAVID MOLGAARD**

System or the Coliseum and Convention Center operations, which were an additional \$5 Million. Nor did it include funding for major projects, such as the \$109 Million Coliseum and Convention Center Expansion and Renovation Project which we substantially completed under my guidance in September 2018 after three years of construction while the facility stayed open for business. Through prudent management and resource allocations, we were able to put aside additional funds that could be drawn upon to meet unforeseen and/or planned contingencies: over \$6 Million in a Healthcare Reserve, \$4 Million in a Stabilization Fund, and over \$14 Million in a Pension Reserve Fund that continues to build.

The three most significant issues facing Charleston when I left were:

- <u>Unfunded Uniform Pensions</u>. Charleston's Police and Fire Pensions were poised to lead the city into bankruptcy with unfunded liabilities over \$280 Million until we implemented an innovative financial solution. In 2010 I devised a new contribution methodology which was adopted by our state legislature with minor modifications that, among other things, allowed the city to close and conserve the assets of the deficient funds, start making benefit payments directly out of our general funds for certain beneficiaries, and begin to build up unrestricted reserves to meet future pension obligations. This program was working as expected when I left and should completely eradicate the city's unfunded pension liabilities over the next 30 years—if subsequent administrations stay the course and administer the program as devised.
- Aging and vacant structures. Although the Charleston Building Commission has taken down hundreds of deficient and uninhabitable houses over the last decade, many more need to come down. Many are owned by absentee landlords and have become havens for a transient population that perpetuate criminal and illegal drug activity.
- <u>Downtown commercial redevelopment</u>. In the 1980's, Charleston undertook a massive urban redevelopment program that included the construction of a downtown mall with four anchor tenants—all but one of which (JCPenney) have now closed. To top it off, the mall owners defaulted on a \$100 Million loan which put the mall into receivership. Although the property was subsequently sold at a substantial discount to new owners, they have continued to lose tenants and have done little to bring in new ones. Additionally, while several other large commercial office and retail buildings in the downtown have recently been renovated into downtown residential units, and the community has just completed renovations and an expansion of the downtown library, there are still numerous street level store fronts and vacant lots in the downtown area which have yet to attract viable projects.

#### GENERAL, MANAGEMENT STYLE AND EXPERIENCE

As a practicing attorney (over 15 years), I regularly counseled my clients and helped lead them to successful outcomes. This experience translated well to my role as city manager where I was able to use my considerable training, analytical skills, and listening abilities, to formulate and

suggest innovative solutions to the mayor, council, and community at large with respect to both pressing and mundane problems and issues. Using my position and leveraging my technical and managerial abilities, I was able to guide and direct staff, and/or collaborate with others, to successfully implement agreed upon strategic initiatives and, where appropriate, proactively initiate direct action that was aligned with stated goals and objectives of the governing body.

Belle Isle appears to be in a good place right now and not facing any major challenges. Building upon the current structure, addressing infrastructure and quality of life issues, and being prepared to meet inevitable and unanticipated change is a challenge facing all the best run municipalities. Climate change, land development/redevelopment, and technological advances, particularly as it relates to automation, Artificial Intelligence (AI), and the Internet of Things (IoT) through "Smart City" initiatives, will require particular and close attention—and especially for those, such as Belle Isle, which are substantially land locked with limited options for growth. Regardless of the situation, I have always found it valuable as a manager to be flexible in approach and to be asking the following questions when facing operational issues: 1) why are we doing it this way; and 2) is there a more efficient and effective way to do it and meet our objectives.

A sound strategy is important, but I believe structure and process must precede and come before a successful strategy. They can be the most resource dependent, but need not be bureaucratic—in fact, it is best if they are not. Moreover, it is necessary to pay attention to what feeds the process—and as often as not it is human capital. To that end, as a manager and organizational leader, I look to: develop and improve core competencies within the organization; deploy and leverage appropriate technologies; strategically align duties and responsibilities; identify, develop and retain leaders; reform work environments and incentives to facilitate mission; and collaborate with others, both inside and outside of the organization. I believe all of the people who have worked under my direction could give multiple examples of how I have advanced these objectives and how they have made their performance and that of the organization more effective.

Over the course of my career, I have taken almost every personnel action possible, both positive and punitive, except for mass lay-offs or reductions in force due to budgetary constraints. To me, it is not only important to get the right people on the bus, but to also get them in the right seats on the bus. Consequently, I will try where possible to develop or move people within the organization before giving up on an individual with potential. Unfortunately, there have been times where I have had to separate persons from employment—but these have always been where performance or effort has been clearly lacking after progressive discipline or performance counseling, or the employee's actions or performance have been such as to warrant immediate termination.

The elected officials I have served would likely say that I am competent, responsive, and resourceful in running the organization and effectively advancing and effectuating their vision and policy initiatives. In fact, they (26 members + a voting mayor) unanimously passed a

resolution to recognize my outstanding performance and efforts to that effect upon my exit. I served a four-year term as a city councilman before becoming city manager and that experience provided an invaluable perspective that informed my performance over my tenure of 15+ years. With every issue, bill, or resolution, I try to anticipate the level and depth of analysis I would want or need to make a policy decision, take a public stand, or cast a vote, and I try to provide or present the relevant information and/or my findings to the council before the question is raised. Consequently, I believe the councils under which I served have been able to have and make informed debates and decisions and to advance the interests of our community in an efficient, civil, and collegiate manner. I direct and execute implementation with equal vigor.

I believe one of my greatest strengths is my understanding of place and place making—both in terms of people and the built environment. While organizationally I place a strong emphasis on structure, process, and inputs, most people outside of the organization would probably commend my talent and ability to plan, develop, and construct successful public work projects and events that have significantly impacted the quality of life in our community. They might, for instance, point to our \$23 Million minor league ballpark project, which kept professional baseball in Charleston. Through my direction on that project we saved an existing historic warehouse which provided additional and unrelated commercial program space and enhanced the economic development dynamics of the project. Or they may point to the innovative Haddad Riverfront Park improvements which included the construction of a retractable canopy over an existing seating bowl, a new stage reminiscent of the sternwheelers that plied our working river, and a boat dock. And they might also note my involvement in developing our 15-week long free concert series (Live on the Levee) that takes place at that park and caters to residents, boaters, and visitors while enhancing our downtown business climate on weekends. . . to name just a few.

When I first stepped into the role of city manager in Charleston, I found an organization that was very siloed, with strong lines of delineation that were inefficient and that worked against interdepartmental collaboration. I am happy to say that we drastically changed that culture. We started at the department head level and we were making great strides in cascading managerial initiative and accountability down to the middle managers and frontline supervisors throughout the organization when there was a change in administration. My biggest regret and failure is not being able to move quicker and to complete the transformation of structural changes in performance management, measures, and reporting that we started—and for which we were making great progress—before I left the position.

In terms of weaknesses, I realize I am not always diligent in purging or cleaning up old files, notes, and accumulations of projects that were investigated but were not pursued or for projects that have long been concluded. I believe this is largely because I am intently focused on the immediate issues at hand and in anticipating future contingencies. I don't micro-manage, but I do like to be actively involved in the projects for which I am responsible. I can't say that this has ever caused a problem in my performance. These accumulations are more personal work product notes and files than anything, but it can be a distraction when I run out of file space or when vacating an office. I am committed to doing better—and I have been delegating custody of more

material to an assistant for record management when possible—but there is something about the dynamics of economic development and the creative process that seems to compel a need for a certain amount of immediate access and retention of written thoughts and analysis for me.

While from a local government perspective I am coming from a much larger organization on paper, I entered that arena from much smaller professional work environments—a contrast that has served me well. I welcome the challenge of directing a smaller, more nimble organization while bringing a larger perspective to dealings and collaborations with adjacent and/or controlling jurisdictions. My experiences, training, and education, while perhaps unique, will align perfectly with a city council that values competency, organizational excellence, and a collaborative effort of service and place making.

During the first six months my efforts will involve:

- Meeting with elected officials and community groups, including the officials of adjacent communities, and county and state government representatives. While I intend to review as much material as I can get my hands on before taking office, and will have met with as many community leaders as time allows, I will renew my efforts and circle back with the council, community leaders, and civic groups to get as clear an understanding as possible as to what the community needs and expects from an effective city manager and the city itself.
- Meeting with staff—including your out-going city manager—and understanding structure and the current state of the organization. I look to build upon the successes of the organization and not to make radical changes without a clear purpose or direction from the council.
- I will assess the city's current financial position once again, review the comprehensive plan again, and review all contracts and performance initiatives, including mutual aid and public safety contracts, and any other service agreements that might affect city operations.
- At the conclusion of my investigations and at regular intervals thereafter, I will make reports to the council of my findings and explore any other avenues that the council may suggest or desire.

Charleston is served by three local television news organizations, several radio stations, and during most of my tenure two newspapers which as I was leaving merged into one but with two editorial staffs. I worked well and extensively with the media (most had my cell phone number and used it). While I generally deferred to the mayor and his staff to issue press releases and conduct news conferences—the fact is, I was frequently called upon to provide the specifics of administration and council action, and I was no stranger to providing everything from succinct and relevant background information to in-depth media analysis regarding projects or municipal action or events.

#### **DAVID MOLGAARD**

In my spare time, I enjoy reading: mostly literary classics, philosophy, and job relevant non-fiction works. I also like to spend time with my wife and participate in outdoor activities. We look forward to spending more time with our only child and his new wife, who live and work in Orlando.

#### SIX ADJECTIVES OR PHRASES I WOULD USE TO DESCRIBE MYSELF

Competent
Proactive
Creative Out-of-the-box Thinker
Responsive
Accountable
Highly Ethical Leader and Mentor

#### REASON FOR DEPARTING CURRENT POSITION

Technically, I retired from the City of Charleston after 19+ years: 15 years and 8 months as city manager and 4 years as a councilman. But as a practical matter, I was given notice that the newly elected mayor—who has the ability under our charter to appoint her own city manager with confirmation by the council which has historically always given its consent to an incoming mayor—made known that she would be appointing her own city manager as well as 11 other key operational department heads. The mayor and most of the council leadership under which I served chose not to run again, but among their last acts honored me with a unanimous resolution recognizing my contributions and effective service.

My subsequent employment, as a law firm chief of staff and firm administrator, came to an end as a result of a realignment of duties within the management structure of the firm.

#### MOST RECENT RELEVANT SALARY

My final base salary with the City of Charleston was \$168,504, with an additional \$5,000 coming from the Charleston Sanitary Board for my service as Financial Advisor.

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# CB&A Background Checks

# **Section 7**

# **Background Check Summary for DAVID "DAVE" DUANE MOLGAARD**

#### **Criminal Records Checks:**

Nationwide Criminal Records Search No Records Found

County

Kanawha County, WV No Records Found

State

West Virginia Records Maintained by

County. See Above.

**Civil Records Checks:** 

County

Kanawha County, WV No Records Found

Federal

West Virginia No Records Found

**Motor Vehicle** 

West Virginia No Records Found

**Credit** Excellent

Personal Bankruptcy No Records Found

Sex Offender Registry Not Listed

**Education** Confirmed

**Employment** Confirmed

Social Media Nothing of Concern Found

# **Section 7**

# **Background Check Summary for DAVID "DAVE" DUANE MOLGAARD**

Under the Fair Credit Reporting Act, 15 U.S.C. 1681-1681Y, credit and bankruptcy information are very sensitive and should not be used be in the consideration of hiring. The information is included for each candidate because we do not want you to be surprised if third parties raise what they consider to be a concern. Also, some states have limited the reporting to seven years, so any records older than that will not be available in those states. In addition, motor vehicle reports are limited to three to seven years, depending on the state.

# **Section 7**

## Background Check Summary for DAVID "DAVE" DUANE MOLGAARD Personal Disclosure

## Personal Disclosure Questionnaire

The following questions are designed so that we will be able to make full disclosure to our client concerning your background. Please answer them honestly. Cutting corners or misrepresenting your past will result in you being

Name of Applicant: David Molgaard

| and that      | at charges do no                 | ot mean you<br>bottom line | were guilty.<br>is that we | d by this firm. We understand that frivolous charges are sometimes made. We also understand that you may have been wronged and needed to seek want to be certain that our client is fully informed. If you have any |
|---------------|----------------------------------|----------------------------|----------------------------|---|
| <u>Please</u> | explain any ye                   | es answers o               | n a separate               | sheet of paper.   |
| 1.            | Have you eve                     | r been charg               | ed or convic               | ted of a felony?  |
|               | Yes                              |                            | No                         |   |
| 2.            | Have you eve                     | r been accus               | ed of or have              | e been involved in a domestic violence or abuse incident?   |
|               | Yes                              |                            | No                         |   |
| 3.            | Have you eve                     | r declared ba              | ankruptcy or               | been an owner in a business that did so?  |
|               | Yes                              |                            | No                         |   |
| 4.            | Have you eve<br>lawsuit?         | r been the su              | bject of a ci              | vil rights violation complaint that was investigated or resulted in a   |
|               | Yes                              |                            | No                         |   |
| 5.            | Have you eve                     | r been the su              | bject of a se              | exual harassment complaint that was investigated or resulted in a lawsuit?  |
|               | Yes                              |                            | No                         |   |
| 6.            | Have you eve                     | r been charg               | ed with drivi              | ing while intoxicated?  |
|               | Yes                              |                            | No                         |   |
| 7.            | Have you eve                     | r sued a curr              | ent or forme               | er employer?  |
|               | Yes                              |                            | No                         |   |
| 8.            | Please list linl<br>personal web | page if you                |                            | a accounts (Facebook / Instagram / LinkedIn / Twitter, etc.) and your   |
| 9.            |                                  |                            |                            | and that, if made public, would cause you, our client or our firm agh the press or any other mechanism?   |
|               | Yes                              |                            | No                         |   |
| 10.           | Please provid                    | le a list of an            | y lawsuits ir              | n which you are or have been a party either as plaintiff or defendant.  |
|               |                                  |                            |                            | Attested to: Signature of Applicant   |
|               |                                  |                            |                            | Signature of Applicant  |
|               | Please                           | email this f               | orm via PD                 | F DOCUMENT to Monique@cb-asso.com or via fax to   |

(561) 621-5965 <u>no later than 5:00 PM MST 05/15/2023.</u>
(Note: Please be sure to sign the form with your actual signature if you are sending Fax or PDF Document)

Page 18 of 133

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## **Section 7**

#### Background Check Summary for DAVID "DAVE" DUANE MOLGAARD Personal Disclosure Explanation

#### Personal Disclosure Questionnaire

Name of Applicant: <u>David D. Molgaard</u>

The following questions are designed so that we will be able to make full disclosure to our client concerning your background. Please answer them honestly. Cutting corners or misrepresenting your past will result in you being eliminated from all further searches conducted by this firm. We understand that frivolous charges are sometimes made and that charges do not mean you were guilty. We also understand that you may have been wronged and needed to seek compensation. The bottom line is that we want to be certain that our client is fully informed. If you have any questions, please contact us for clarification.

#### Please explain any yes answers on a separate sheet of paper.

Have you ever been charged with driving while intoxicated?

I was charged with DUI sometime in or about April 1984 while I was a college student. My driver's license was revoked for a period and then reinstated. I have not had any issues since.

Please list links to all your social media accounts (Facebook / Instagram / LinkedIn / Twitter, etc.) and your personal web page if you have one.

https://www.linkedin.com/in/david-molgaard/

https://www.facebook.com/david.molgaard

https://twitter.com/DMolg

https://www.instagram.com/dvdmlgrd/

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# CB&A Reference Notes

# Reference Notes David Molgaard

#### Jack Harrison – Former Council Member, Charleston, WV 304-545-1530

Mr. Harrison first met Mr. Molgaard in 2003 when the latter became the City Manager. They worked together until January 2019 when they both left the organization.

Mr. Molgaard was a fantastic City Manager who allowed the mayor to do his job and not be shackled with the daily operations of the city. One of his biggest strengths was overseeing projects and seeing them through to fruition. For example, their \$23 million minor league ballpark would not have gotten done without his project management skills. Additionally, they just completed a \$100 million upgrade to the civic center that was completely funded with city dollars and no outside sourcing.

When it comes to dealing with personnel, Mr. Molgaard did very well. He understands how things work with his staff at all levels of the organization from the department directors to the police officers. He knows how to get things done by keeping his people focused and looking towards the prize.

In terms of finance Mr. Molgaard is very astute at projecting and managing pension debts and he provided guidance to the Council on managing those unfunded liabilities. He is very knowledgeable with a law background and understands contracts and municipal finance very well. That is not to say that he made all those types of decisions in a vacuum. He was interested in learning about, talking, and discussing issues, and embraced the ideas of others.

By nature of being the City Manager, Mr. Molgaard was required to interact on a regular basis with the public at large. He wore countless hats and was involved in various groups within the community getting their buy in for projects and new processes.

Communicating with the Council was key for Mr. Molgaard. He knew that in order for him to accomplish anything at the city he would need the Council's approval. He ensured they had a constant flow of information back and forth. He communicated everything with them whether it was negative or positive, ensuring that they would be prepared on every subject matter.

Mr. Harrison does not know of any controversial issues caused by or involving Mr. Molgaard. He has no knowledge of anything from Mr. Molgaard's background that would be construed as embarrassing to any future employer. Any organization would be fortunate to have him on their team. He is a class act and Mr. Harrison highly respects his intellect and good judgement.

#### Words or phrases used to describe David Molgaard:

- Smart,
- Energetic,
- Easy to get along with, and
- Willing to listen.

## Reference Notes David Molgaard

**Strengths:** An exceptional manager who accomplished a great deal while in their city.

Weaknesses: None identified.

## Mary Jean Davis – Planning Committee Chair, Charleston, WV 304-546-5902

Ms. Davis met and started working with Mr. Molgaard in 1998. They first worked together when he was serving on the Council and then when he became the City Manager. She has a great deal of respect and trust for him.

Ms. Davis has never seen such a talent as Mr. Molgaard. Before he came on the Council he was a good attorney and since that time he has become a master of all trades. His work ethic is unbelievable and one she has never seen the like of in anyone else. He ensures that the ball does not get dropped on any project. He is constantly monitoring the status of things but does not get in the way of the work being performed.

When it comes to decisions, Ms. Davis has never known Mr. Molgaard to make a bad one. When he speaks people know it is from a place that has been studied and examined thoroughly. From pension plans to project management he knows what he is doing and has incredible judgement. It was his talent for budget control, design, and knowledge that made their new ballpark possible.

Ms. Davis would characterize Mr. Molgaard as someone who is innovative, a change agent, and someone who maintains the organization at a high performance level. He is an attorney by profession and all three of those attributes fit him. He is extremely thorough when he is working on a project, and he does his research. When he is given a job to do, no matter what it is, he will get it done and get it done right.

Dealing with the public is another area where Mr. Molgaard shines. He has extensive experience with the community and works with them extremely well. He is also just as attentive to the elected officials and keeps them well informed about what is happening in the city. If something is not working, he will inform those involved. Additionally, he deals very well with stress, especially when he is in the public eye. Their former mayor had a difficult personality and sometimes it was stressful dealing with him, however, Mr. Molgaard did a fine job of working with him without becoming stressed out.

Ms. Davis is not aware of anything controversial or embarrassing involving Mr. Molgaard that would come to light if the press were to investigate his history. He has a plethora of fine attributes and anywhere he lands the people in the organization will be pleased with him.

## Reference Notes David Molgaard

### Words or phrases used to describe David Molgaard:

- Educated,
- Friendly,
- Compassionate,
- Trustworthy,
- Loyal, and
- Admired.

**Strengths:** An extremely hardworking individual who is highly intelligent and thorough.

**Weaknesses:** Can be hard for him to delegate.

## Andy Richardson – Former Council Member, Charleston, WV 304-549-5597

Mr. Richardson worked with Mr. Molgaard between 2011 and 2019 when the latter was City Manager. During that time, they worked on several important projects together. Mr. Molgaard was an excellent City Manager. He was very thorough and able to manage multiple projects simultaneously. He had a way of knowing when to bring others into a decision and when to move forward and make the decision on his own. He is both an effective leader and an effective manager.

Mr. Molgaard directed a huge project to redo the Colosseum and convention center. Mr. Richardson served on the board and worked closely with Mr. Molgaard in that capacity. Mr. Molgaard acted as the city government liaison on the project and oversaw the renovations with impressive acumen. He also oversaw the construction of a new baseball stadium with a similar approach and results.

Mr. Molgaard was instrumental in the development of two items which were game changers in the downtown area. The first was developing a program to encourage local restaurants to embrace sidewalk dining, and the second program was to modernize the parking meters so patrons could use either coins, mobile apps, or a card to pay. These two initiatives were wildly successful and helped bring more life to the downtown area.

Mr. Molgaard is innovative. He is a problem solver and solution oriented. He possesses a good amount of vision associated with his work. He is active in the community and available for comments from the public. He prefers operating on a schedule and does not waste time, either his own or others. At the same time, he is cognizant of taking care of himself and taking time to recharge away from the bustle of his city duties. He takes time to go to his cabin out of town to create a functional work/life balance. Because he takes the time to care for himself, when he is present in his position, he is fully active and engaged and ready to go to work and be productive.

## Reference Notes David Molgaard

Mr. Molgaard was an excellent City Manager for Charleston and will continue to excel wherever he chooses to go. Mr. Richardson highly recommends him for a manager position.

### Words or phrases used to describe David Molgaard:

- Conscientious,
- Man of great integrity,
- Intellectual,
- Savvy judgment,
- Enthusiastic, and
- Innovative

**Strengths:** Thoroughness and driven.

Weaknesses: He is better at managing projects than managing people. He was effective at both,

but he preferred dealing with the complexities that come with projects rather than dealing with the individual personnel issues that come up in being a manager.

### Greg Stone – Reporter, Charleston Gazette-Mail, WV 304-348-5124

Mr. Stone considers Mr. Molgaard a friend. They have known each other since the late 1990s. They attended the same church together, and Mr. Molgaard even represented Mr. Stone free of charge during his divorce. It was an unfortunate situation, but under the circumstances, it was a huge help. It was very charitable and generous of Mr. Molgaard to offer his services in this manner.

Mr. Molgaard is honest in his dealings with Mr. Stone and everyone else with whom he associates. He was a long-time City Manager for Charleston and was very respected in that position by the city council members and citizens at large. Mr. Stone covered City Council meetings occasionally and was impressed by the sincerity and professionalism Mr. Molgaard showed.

Being a lawyer, Mr. Molgaard was on top of the legal aspects of various projects in the city. He was industrious and saw all the projects through to the end. He was especially instrumental in completing a bike trail project on the West side of the town. It turned out to be such a successful project that the administration is currently looking at options to extend and increase the trails.

Mr. Molgaard was involved in everything. While the Mayor was a popular and entertaining individual, it seemed to Mr. Stone that Mr. Molgaard did most of the heavy lifting behind the scenes. He made sure all day-to-day items were taken care of so the mayor could focus on other items more suited to his position.

## Reference Notes David Molgaard

Mr. Molgaard knew how to stretch a dollar in productive and appropriate ways. He was savvy about where to allocate certain funds and had a good idea of how long money would last. He knew how to apply for grants and made the budget last. He has not been involved in anything controversial or potentially embarrassing to a future employer. He will be an excellent Manager wherever he goes.

### Words or phrases used to describe David Molgaard:

- Alert,
- Energetic,
- Fluent in his speech,
- Sharp,
- Focused,
- Friendly, and
- Helpful.

Strengths: Highly competent, familiar with every part of his job description, always on top

of things, actively engaged and takes pride in doing a job well done.

Weaknesses: Could be a bit bolder at times, although in his position as a city manager, instead

of a mayor, perhaps boldness is not the quality one looks for in that position.

#### Miranda Rutledge – Former Assistant Manager, Charleston, WV 304-539-1011

Ms. Rutledge worked with Mr. Molgaard as Assistant Manager and Assistant Director of Human Resources between 2008 and 2019. He was her direct supervisor during that time. She is currently the HR Specialist with the Kanawha County Schools.

Mr. Molgaard was one of the best people for whom Ms. Rutledge has ever worked. He was very good at giving constructive criticism and helping others grow in their careers. She feels very fortunate to have worked under him for so many years.

Mr. Molgaard is a strong leader. He expects excellence from his employees, and they rise to the occasion. He makes quality decisions and has a good decision-making process. If there is a problem, he listens to everyone, gathers input, and then ultimately makes the final decision on what is best for the organization. He has a direct communication style. He did not let stressful situations get the better of him. He compartmentalizes the tasks and accomplishes what needs to be done.

Mr. Molgaard is innovative. He was often out in the community so he could understand where the real issues were and what needed to be addressed. There is nothing embarrassing or controversial in his background. Ms. Rutledge would hire him if she had the option and would work for him again if the opportunity arose. He will be a great city manager anywhere he goes.

## Reference Notes David Molgaard

He has much experience and growth in that arena and should be strongly considered for the position.

### Words or phrases used to describe David Molgaard:

- Creative,
- Caring,
- Strong,
- Good leader,
- Customer service oriented,
- Experienced, and
- Listener.

**Strengths:** Leadership and ability to get the right people into the right positions. He is in tune

with finding people's strengths.

Weaknesses: Can be a little intimidating at first, but only because he is a confident and highly

productive individual.

#### Charlie Loeb – Former Council Member, Charleston, WV 304-340-1298

Mr. Loeb has known Mr. Molgaard since 1998. They worked together as fellow Council Members until Mr. Molgaard became the City Manager in 2003. Mr. Loeb continued to work with him as a Council Member until the former retired in 2007. The two gentlemen continued to work together extensively with Mr. Loeb representing his clients on behalf of some real estate developments in the city until Mr. Molgaard left his position in 2019.

Mr. Loeb has nothing but the greatest praise for Mr. Molgaard's abilities intellectually, but also because he gets things accomplished. He rates an A+ for everything that he does. Even when he takes a strong position on issues he listens and knows how to resolve issues without letting his ego get in the way.

Mr. Molgaard makes good decisions, and he is well suited in demeanor and intellect to be a fantastic City Manager. In addition, he is innovative in terms of financing projects, and he has certainly maintained a high level of performance at the city. He has not been in a position to exercise any actions where Mr. Loeb would determine him as a change agent, but that does not mean he could not be one.

Charleston has a fairly large council with 27 members where Mr. Molgaard had to relate to each one on a regular basis both privately and publicly. He always dealt with everyone professionally and in a matter-of-fact manner. He does not beat around the bush in his communication but is extremely direct.

## Reference Notes David Molgaard

Mr. Molgaard has not been involved in anything controversial. He left the city because a new mayor came on board after several decades of the same mayor and she wanted her own people brought in. It is a great loss to the city and Mr. Loeb hoped he would land someplace close. He has a passion for urban planning and how successful cities have evolved over the years. Whoever hires him will be bringing a wonderful person on to their team.

### Words or phrases used to describe David Molgaard:

- Effective,
- Straight forward,
- Intelligent, and
- Insightful.

**Strengths:** An intelligent professional who listens to others and gets things accomplished.

Weaknesses: Some people would say that he took on or controlled too much as the City

Manager, however, Mr. Loeb would respond that their city is thinly staffed so he

had numerous responsibilities pushed onto him.

## Cari Morris - Former Assistant to the City Manager, Charleston, WV 304-687-6551

Ms. Morris first met and began working with Mr. Molgaard in 2003. She began working directly for him as his assistant in 2016 until he left the city in January 2019.

Mr. Molgaard was a phenomenal manager and boss who Ms. Morris hated to see leave. He is the absolute best person she has worked with. He is charismatic and the kind of leader who inspires others. He inspired her to go back to school and pursue higher education. He is also quite personable and always knows everyone's name. He went the extra mile and was dedicated to his job.

One of Mr. Molgaard's strong points is decision making. Everyone in the city always came to him for advice on issues whether large or small. He also did well when it came to hiring personnel. He worked in conjunction with the department heads and the Human Resources Director to make the best hires possible.

Mr. Molgaard is very experienced in terms of interacting with the public. He is the type of person who when he walked around in the community, everyone knew him and who he was. He was always interested in people and kept mental notes about the people in his community.

One thing that Ms. Morris liked about Mr. Molgaard was his innovative side. Whatever problem was presented to him, he mulled it over and came up with an out of the box solution that no one else had thought about. Once the solution was settled, he communicated it to his staff and then brought it to fruition.

#### C.

## Reference Notes David Molgaard

In terms of finances, Mr. Molgaard is extremely well versed. He worked closely with the Finance Director dealing heavily with the budget and ensured that it was always balanced. He was successful in reducing the cost of healthcare for the employees and was conscientious about getting them the best coverage for their money.

In stressful situations no one even knew if Mr. Molgaard was being affected. His personality is even keeled and professional. Ms. Morris never heard him raise his voice at an employee or anyone for that matter.

Ms. Morris is not aware of Mr. Molgaard having any embarrassing items in his background that would come to light if the press were to investigate him. He has not been involved in any controversies to her knowledge. When the new mayor and her team came on board he was very compliant and helpful throughout the entire transition. If Ms. Morris had the chance to hire him she definitely would.

## Words or phrases used to describe David Molgaard:

- Smart.
- Innovative.
- Charismatic,
- Caring,
- Self-starter, and
- Responsible.

**Strengths:** An inspiring leader who is personable, charismatic, and dedicated to doing the

best job he can.

Weaknesses: Sometimes loses track of time and spends too much time on projects and has to

readjust his timeframe. It is not to the extent that he ever misses deadlines, but it

is something that he and Ms. Morris continually worked on together.

#### Bobby Reishman – Former Finance Committee Chair, Charleston, WV 304-546-8632

Mr. Reishman first met Mr. Molgaard prior to him becoming the City Manager in approximately 1998. Mr. Reishman has worked as a Council Member since 2003.

Mr. Molgaard is talented, organized, and tremendously hardworking. Mr. Reishman was amazed at how quickly he picked up new things and ran with them. Charleston was successful because of Mr. Molgaard.

Mr. Molgaard makes good decisions, is innovative, and maintains the organization at a high-performance level. He was always involved in all the city's issues as well as the social aspects of

## Reference Notes David Molgaard

the community. He was successful dealing with the public in general and was always communicative with them as well as the elected officials.

Mr. Molgaard was a leader in the sense that he took the organization's vision and rallied the employees around it. He worked well with the employees and involved the department heads more than they ever were before he was the manager.

Mr. Reishman is not aware of any controversies involving Mr. Molgaard. He would be shocked if the press found anything in Mr. Molgaard's background that proved to be embarrassing.

### Words or phrases used to describe David Molgaard:

- Dedicated.
- Hardworking, and
- Competent.

**Strengths:** A talented and hardworking professional who worked well with the employees,

the elected officials, and the general public.

Weaknesses: None identified.

## Tom Lane - Former Council President, Charleston, WV 304-347-1111

Mr. Lane has known Mr. Molgaard since 1999 when he was serving on Council. They continued to work together when he became the City Manager in 2003 until he left that position in 2019.

From the time that Mr. Lane met Mr. Molgaard as a fellow Council Member he recognized how diligent he was at reading contracts and how his background as an attorney helped them tremendously in that respect. He was well versed in contracts and always had a constructive comment and a critical view of them to ensure that the best interests of the city were being considered. Few people put as much time as he did into looking at all the issues when he was serving on Council.

Mr. Molgaard's law degree gave him a unique benefit and he was much better at understanding the workings of the city than others. His education gave him a strong base from which to work. He also had a tremendous ability to communicate and articulate complicated issues in a very clear manner so that others could understand them. He always offered explanations to the Council, ensuring that everyone understood what they were doing.

In terms of decisions, Mr. Molgaard had excellent judgement. As a Council Member he was called upon to make judgements as a city official and as a City Manager he was the decision maker on numerous issues. He and the Mayor made a fine team as the mayor was more of a big

## Reference Notes David Molgaard

picture person and Mr. Molgaard took care of the daily operations decisions unless it involved a policy change.

Mr. Lane would characterize Mr. Molgaard as innovative, especially at putting things into place that were new and creative which provided great benefit to the community. He was always one who was constantly thinking outside the box. Early on when he became the City Manager, he and the Council had a planning meeting where he fully embraced the goals set forth by the Mayor and Council. He then drilled those goals down through the ranks of the organization ensuring that everyone caught the vision.

One goal that Mr. Molgaard accomplished was to make the city run more efficiently and be more user friendly to the residents. He came up with the idea of a one-stop shop making all the city's services available in one location for the convenience of the users.

Another issue that Mr. Molgaard tackled was that of the ever-increasing costs of healthcare for the city's staff. That was an issue that predated him and no matter what they did they continued to struggle with how to maintain and control those costs. When they were in the process of building the new ballpark, they had an excess space where they decided to use it as a health clinic for city staff. Everyone on the city's health plan now receives a basic yearly health test as well as primary care through the clinic. When that was put into place the cost of healthcare decreased. They were able to save money as well as document some individuals who had some serious health issues that needed attention. It not only helped the budget, but it also helped to save people's health. They now always come under budget in that regard and have \$5 million in reserve for medical care expenses.

Mr. Molgaard is a people person. He does well in both one on one settings as well as in large groups. He is quick on his feet and speaks well in front of an audience. When stressful situations arose, he remained objective and was calm, cool, and always responded in a measured manner.

Mr. Lane does not know of any controversies involving Mr. Molgaard. He knows of nothing remotely embarrassing in his background that would be uncovered if the press were to go digging. He is quite familiar with him both professionally and personally, and if something were there he would have found out years ago.

## Words or phrases used to describe David Molgaard:

- Disciplined,
- Analytical,
- Thoughtful,
- Creative,
- Diplomatic, and
- Rock solid under pressure.

## Reference Notes David Molgaard

Strengths: A tremendously dedicated and intelligent individual who works and

communicates well with others.

Weaknesses: None identified.

### Mark Baldwin - City Manager, Martinsburg, WV 304-264-2131 Ext. 277

Mr. Baldwin met Mr. Molgaard through the various professional City Manager associations at conferences and meetings in 2003.

Mr. Baldwin always finds Mr. Molgaard to be engaging and knowledgeable in many aspects of city management. He is in tune with what is going on and is always accommodating to Mr. Baldwin and his questions.

Even though the two gentlemen have only met and talked a handful of times per year, because Mr. Baldwin keeps up with the surrounding municipalities in his area, he keeps up with what has happened with Mr. Molgaard. He knows that he has done a fine job managing Charleston and that he makes good decisions when it comes to his community.

Mr. Baldwin would characterize Mr. Molgaard as someone who is innovative and someone who maintains the organization at a high-performance level. If the organization is working well, he will not rock the boat, however, he has been innovative with restructuring to make it more efficient. He is good at keeping up with the times and moving the city forward. Lasting as long as he did with the previous Mayor shows that he did something right.

Mr. Baldwin is not aware of anything controversial involving Mr. Molgaard. He has no knowledge of any embarrassing information that would come to light if the press were to investigate Mr. Molgaard's history. He would hire Mr. Molgaard if he had the opportunity.

#### Words or phrases used to describe David Molgaard:

- Knowledgeable,
- Engaged,
- Proactive,
- Innovative, and
- Creative.

Strengths: An experienced and knowledgeable administrator who moves his community

forward.

Weaknesses: None identified.

## Reference Notes David Molgaard

### Joe Estep – Former Finance Director, Charleston, WV 304-549-5425

Mr. Estep first met Mr. Molgaard in 1999. They knew each other and worked together on the Finance Committee when Mr. Molgaard was an elected official. Mr. Estep came on board with the city as the Finance Director in 2004 and reported to him until Mr. Molgaard left his position in 2019.

Mr. Molgaard did a fantastic job for Charleston. He had such vision, but also the wherewithal to bring ideas to fruition by using his team in the right manner. He has done some tremendous things for the city.

Mr. Molgaard pays particular attention to details and uses his people in a smart manner. He expects them to generate results, but he also keeps on track with what is happening in the organization. He held weekly meetings to effectively communicate with the staff the happenings of the organization and the city. He has excellent written skills particularly with contracts and policies.

In a professional manner Mr. Molgaard was the type of manager who was out and about in the community. He was a member of the Board of Directors for the civic center and was a vocal person in the media representing the activities going on in Charleston. He was an excellent communicator which stemmed from his 20-plus years as an elected official and City Manager.

When Mr. Estep brought a situation to Mr. Molgaard the first thing he did was listen and filter through what he was hearing. He then took the time to evaluate the situation before going forward with a solution. He was not a reactionary problem solver, but a thoughtful and deliberate one.

Mr. Estep is not aware of anything in Mr. Molgaard's background that would be thought of as unflattering or embarrassing. He left because the new Mayor wanted her own staff. If Mr. Estep were an elected official he would absolutely hire Mr. Molgaard to manage his city.

#### Words or phrases used to describe David Molgaard:

- Visionary,
- Intelligent,
- Good communication skills both internally and externally,
- Excellent written skills, and
- Absorbs and retains information very well.

**Strengths:** A tremendously talented and hardworking individual who has an incredible

memory and vision for his organization.

Weaknesses: None identified.

## Reference Notes David Molgaard

## Paul Sheridan – Community Member & Attorney, Legal Aid of West Virginia, Charleston, WV 304-543-6557

Mr. Sheridan's primary involvement with Mr. Molgaard has been with their work with their sister city in Slovakia. He has known him for many years starting in approximately 2009.

Mr. Molgaard was the representative for the City of Charleston with their sister city in Slovakia and established a very important relationship in that regard. His interactions in that regard have been exceptional and he interacts with the people of that city extremely well.

In terms of doing his job as the City Manager, Mr. Molgaard seemed to do a fine job. He appears to be well organized and focused. He strikes Mr. Sheridan as someone who deals with important items keeping meetings and endeavored to keep the city focused and on track. He did a good job of walking the line between city and non-city functions.

Mr. Molgaard has a stellar reputation in the area and as a City Manager he was well respected by his peers as well as the residents. He was the central person in the development of the beautiful civic center that was completed. He knows what he is doing at his job and he does it well.

Mr. Sheridan is not aware of anything controversial or that would be detrimental to Mr. Molgaard's character. If Mr. Sheridan were in a position to hire Mr. Molgaard, he certainly would consider Mr. Molgaard very seriously. If a firm was looking for someone to run the show, he is a strong candidate.

#### Words or phrases used to describe David Molgaard:

- Focused,
- Organized, and
- Personable.

**Strengths:** Well organized and focused.

Weaknesses: None identified.

## Matt Ballard – Former President & CEO, Charleston Area Alliance, Charleston, WV 304-356-3165

Mr. Ballard first met Mr. Molgaard in 2005 when he came into his role at the Alliance. The two gentlemen worked on matters pertaining to Economic and Community Development for the city until Mr. Molgaard left his position in 2019.

## Reference Notes David Molgaard

Mr. Molgaard did an amazing job for Charleston. He is professional, serious minded, and a hard worker. He is always courteous and responsive to Mr. Ballard, the latter has enjoyed working with him, and has had nothing but a positive experience working with him.

Mr. Molgaard is a sound decision maker. He is logical and does not let much emotion play into his decision-making process. He bases them on facts, research, and data. He led the entire process of the \$90-\$100 million civic center renovation. Additionally, the three or four projects he has led in his thirteen years as City Manager will leave a positive mark on the area.

In his role in the city, Mr. Molgaard cannot avoid working and dealing with the public. He has fantastic customer service skills and works well with people in the community. At times the manager had to say no to residents, but they always left his office satisfied even if they did not get the answer for which they had originally hoped.

Mr. Ballard does not know of any controversial situations involving Mr. Molgaard. He knows of nothing negative from his past that would be uncovered if he were to be scrutinized by the press. He would definitely hire Mr. Molgaard if he had a role that fit his skill set. He was a good City Manager for them, and he will do well serving another municipality.

### Words or phrases used to describe David Molgaard:

- Hardworking,
- Professional,
- Fair, and
- If presented with a vision he will make it happen.

**Strengths:** An excellent manager who is professional and accomplishes the goals of his

organization.

Weaknesses: None identified.

**Prepared by:** Amanda Jenkins and Heather Linares

Colin Baenziger & Associates

c.

C.

## CB&A Internet Research

## Internet – Newspaper Archives Searches David Molgaard

(Articles are in reverse chronological order)

[CB&A Note: We asked Mr. Molgaard about this case, and this was his response:

During my tenure as City Manager, I was named, by virtue of my office, as a Trustee with respect to certain forgivable home loans issued by/through the city. Apparently the taxes on this property were not paid by the owners and this is a notice to redeem. I, along with anyone else who was associated with this property, received this notice. I contacted the relevant persons at the City to be sure their interest was protected and was told I need do nothing and to not worry about this.]

https://wvlegals.com/legal-notices-13546/

Charleston Gazette-Mail January 24, 2023

**Legal Notices**Author: Unknown

NOTICE TO REDEEM TO: GLENN FORD, SHANNON FORD, STATE OF WEST VIRGINIA STATE TAX DEPARTMENT, CITY MANAGER OF CHARLESTON WV, **DAVID MOLGAARD** TRUSTEE, CITY OF CHARLESTON MOECD, CITY OF CHARLESTON, STATE OF WEST VIRGINIA WVDHHR, CHILD SUPPORT ENFORCEMENT SERVICE KEISHA MONIQUE AMOS, KEISHA MONIQUE AMOS, OCCUPANT, IRS ATTN ADVISORY CONSOLIDATED RECEIPTS WV STATE TAX DEPARTMENT, or heirs at law, devisees, creditors, executors, administrators, trustees, attorney in fact, representatives, successors or assigns, co-owners, occupant, other parties having undivided interest in the delinquent property, and other parties that may have interest in the subject property.

You will take notice that WVTJ LLC the purchaser of the tax liens on the following real estate: LTS 223-224 BEECHWOOD ADN RED OAK ST 1408 located in CHAS W District, Kanawha County, West Virginia, which was returned delinquent in the name of FORD GLENN & SHANNON and for which the tax lien(s) was sold by the Sheriff of Kanawha County at the sale for delinquent taxes made on the 15th day of November, 2021, as requested that you be notified that a deed for such real estate will be made to him on or after the first day of April, 2023, as provided by law unless before that day you redeem such real estate.

The amount you have to pay to redeem on the last day, March 31st, will be as follows: Amount paid at Sheriff sale \$360.98 Interest to March 31st \$61.37 Amount of taxes paid on property since the sale \$0.00 Interest to March 31st \$0.00 Amount paid title examination (including interest) \$575.00 Amount paid for notices \$54.00 Amount paid for services \$125.00 Amount paid for first class and certified letters \$174.02

## **Section 7**

## Internet – Newspaper Archives Searches David Molgaard

(Articles are in reverse chronological order)

Amount paid for publication \$300.00 Amount due Sheriff of Kanawha County \$1650.37 Amount due County Clerk (Cert. Of Redemption fee) \$35.00 TOTAL (cash, cashier's check or money orders) \$1685.37 (No personal checks will be accepted)

You may redeem anytime before March thirty-first by paying the above total less any unearned interest. Given under my hand this 9th day of NOVEMBER, 2022 Vera J. McCormick, Clerk of the County Commission of Kanawha County, West Virginia Cert. Of Sale # 21-S-0720 Sheriff and County Clerk payments must be separate. Payments remitted to the Kanawha County Clerk Attn: Record Room 409 Virginia Street East Charleston, WV 25301. Phone 304-357-0240 LC-145143 01-24,31 2-07;2023

## **Section 7**

# Internet – Newspaper Archives Searches David Molgaard (Articles are in reverse chronological order)

https://www.facebook.com/david.**Molgaard/**March 20, 2020

### **David Molgaard**

It's hard to believe I have been with Bailey & Glasser for a little over a year now--and I couldn't be working with a finer group of people.

With the closing of dine-in restaurants, many of our neighboring businesses on and around Capitol Street have had to cease business--but there are a few that have chosen to stay open and provide carry-out dining for as long as they can.

As a way to support these neighboring establishments who are trying to make a go of it, Bailey & Glasser is encouraging our employees to patronize them by picking up their lunch tabs. It's also a nice way of saying thank you to our employees (both those who are required to report to the office and those who are doing their part to create social distance by working from home), for helping us to stay operational during this difficult time.

No one knows how long this situation will last, but true community is about helping each other through difficult times. I am happy to have landed in a place that understands that--and I hope you are in that kind of place as well.

## **Internet – Newspaper Archives Searches David Molgaard**

(Articles are in reverse chronological order)

Charleston Gazette-Mail (WV) July 17, 2019

### No one has crossed the bridge in 30 years and likely never - will again

Author: Rebecca Carballo Staff writer

Not one train or person has crossed the rail trestle that extends over the Kanawha River on the West Side of Charleston since the 1980s. Charleston Urban Renewal Authority board members inquired during a June meeting why the rail trestle hadn't been repurposed or demolished. It turns out the trestle has a host of structural issues that would need to be addressed before it were to be used again.

In 2003, the city of Charleston began talks about repurposing it as a bike trail. City C ouncil had several studies and reports done on the trestle, and a coalition called The Friends of the Kanawha Trestle Trail formed in support of it. However, after a report came back saying necessary construction would cost \$17.5 million, the proposal died.

It came up again when the West Side Community Renewal Plan was presented to CURA in June. But James Yost and David Gilmore, the consultants working on the plan, said they don't recommend to use the trestle itself. Instead, they suggest creating a trail underneath the trestle using its right-of-way. However, Yost said these are all suggestions and that he has not been in talks with CSX.

During the presentation, Charleston City Council member and CURA board member Keeley Steele asked: "If it has all these structural problems, are we going to just leave it there? However, there isn't anything the city can do about it because CSX, a railroad company, owns the bridge. CSX did not provide comment after multiple inquiries from the Gazette-Mail.

The railroad company in 2006 offered to give the trestle to the city and to sell its 5 1/2 acres under fair market value. However, the city never acquired the trestle after the structural report came out. "The river piers are made of poor quality concrete by today's standards and are deteriorated significantly, according to the report. Inspectors found spalls (flakes) up to a foot deep, cracks and no evidence of steel reinforcement in the massive piers. There was also some damage underwater, according to a previous Gazette-Mail article.

The bridge was in fair condition, according to the final report, which the Gazette-Mail obtained through FOIA. But due to its large size, small repairs over the entire length add up to about \$13 million. If the city decided to paint it the grand total would be \$17.5 million. Earlier estimates indicated a much smaller price tag of \$3.2 million. A total of \$6 million was raised with state and federal grants and contributions from the city and businesses, said Dennis Strawn, a long-time supporter of the project.

The bridge was built in 1907, and 1956 was the last time any construction was done on it. Strawn said he believes this was recent enough. "The bridge was rehabilitated during or before all of the

## Internet – Newspaper Archives Searches David Molgaard

(Articles are in reverse chronological order)

major wars, Strawn said. "The federal government was throwing money around to make sure it was on good footing. There's minimal deterioration of that bridge. They built them to last.

If the bridge were to be converted to a trail, it would carry a much lighter load than it was initially designed. Originally it was built to carry 568,000 pounds over a distance of 104 feet, according to one of the several reports done on the bridge. This is six times more weight than the estimated amount needed for it to become a bike trail. But the reports indicated enough work needed to be done on it. The final price tag was just too high, City Engineer Chris Knox said. "It was just cost prohibitive, and it would cost even more now, Knox said. "I'd like to see it demolished or rehabilitated, but I don't think the City of Charleston will ever fund a \$20 million project there.

Strawn said the city did not need to pay to have all the repairs done at once. "We were going to open it up section by section, Strawn said. "The way these projects work is you put your foot in the door get public support and apply for grants, then ask for more and you get more.

However, then-city manager **David Molgaard** said it would be ill-advised and ultimately a large liability for the city. "It's not Charleston's issue; we never took possession of the bridge, and I think it would be foolhardy to do so without sufficient funding to rehabilitate it to the point we could actually use it for pedestrian or bicycle use, **Molgaard** said earlier this month. "Quite frankly, if we just acquired the bridge and try to piecemeal it then in my opinion, we would be faced with a very large liability.

If the City of Charleston acquired the bridge and could not come up with enough funding to rehabilitate it, then it would be responsible for the demolition, which could cost about \$7 million, **Molgaard** said.

**Molgaard** added that the trestle was supposed to be a part of a larger trail system. Instead of losing the grant money, they allocated it toward the bike and pedestrian trail along the Kanawha Boulevard, ultimately contributing to a trail system. "I think we made every effort we could to secure funding to make that project work, **Molgaard** said. "It just wasn't going to happen in the time frame we had available to use the money we had secured.

## Internet – Newspaper Archives Searches David Molgaard

(Articles are in reverse chronological order)

Charleston Gazette-Mail (WV) December 18, 2018

## Charleston police chief, 11 others, out as Goodwin - transition takes shape

Author/Byline: Rebecca Carballo

At Charleston Mayor Danny Jones' final full City Council meeting, he announced a list of 11 people who will not be joining the next administration. He also announced that Charleston Police Chief Steve Cooper will be the new manager of the Charleston Sanitary Board come January.

The following people will be leaving with Jones: City Manager David Molgaard;

Mayor-elect Amy Goodwin plans to make announcements regarding some of the replacements over next few days, said Matt Sutton, Goodwin's chief of staff. Some positions won't be filled immediately. "We want to be able to get a sense of what the needs are as we look to create a more efficient city government, Sutton said.

This means some positions may be combined and even eliminated. However, positions cannot be completely eliminated until a new budget is drafted in fiscal year 2020 because that would take a budget amendment.

The changes in city leadership did not have anything to do with the individuals' job performance, Sutton said. "It was about finding people the mayor-elect knows and trusts to head Charleston in a new direction, Sutton said.

Outgoing City Manager **Dave Molgaard** said he knew of his status on Thursday. He said he wasn't surprised. "I met with her four times since the election, and I never got any indication that she was going to keep me, **Molgaard** said.

He doesn't know what he plans to do next, but said he looks forward to the future. "We're dusting off the sails, and I'm going to see where the wind takes me, **Molgaard** said.

## Internet – Newspaper Archives Searches David Molgaard (Articles are in reverse chronological order)

Charleston Gazette-Mail (WV) October 18, 2018

## \$110M renovation is completed at capital city's former - Civic Center

Author/Byline: Rebecca Carballo

For the past 18 months, the Charleston Coliseum & Convention Center has been relying on two large customized tractor-trailers as kitchens. But now the facility, formerly known as the Charleston Civic Center, has a new state-of-the-art kitchen that is three times larger than the original. Operating out of a tractor-trailer was one of the many tactics the facility's staff used to stay open during the three years of construction. The renovations have been a long time coming for the 60-year-old staple of Charleston. The public will get to see the upgraded building Friday at a ribbon-cutting ceremony. The latest construction began in summer 2015, and the facility was slated to be finished six months ago. John Robertson, the general manager, said staying open was part of the reason for the delay. "We didn't have the luxury to close, Robertson said. "In Charleston, West Virginia, we have too many state and local groups that depend on us. If we close, they have nowhere to go.

Built in 1958, the last time any construction was done was in 2000, when the ice arena was removed from the then-Civic Center. Prior to that, no updates had been done since the coliseum opened in 1980. Charleston Mayor Danny Jones said the renovations were necessary and a long time coming. "Hotel operators have done a lot of remodeling and expansion here, so there was pressure to do something about the Civic Center, Jones said. "It was functional but, aesthetically, it looked more like a regional jail than a convention center. The renovations primarily focused on the convention center. There were 25,000 square feet added on for a ballroom, which can now seat up to 1,400 people. Before the ballroom could be built, though, the exhibit area would have to be transformed into a makeshift dining hall for banquets or black-tie events. This would involve rolling out carpet to cover the gray floor and putting up curtain walls to give it a more formal appearance.

Other aesthetic renovations and upgrades were made throughout the facility, including new furniture, carpet, outdoor space for cocktail parties and artwork, some of which was commissioned by West Virginia artists. There also have been some technical upgrades. The facility is now completely computer controlled, for functions like lights, heating and air conditioning. There also is more bandwidth for Wi-Fi. In some areas of the building, it will be free, but, in other areas, there may be a charge.

Another aspect of the renovations was creating a new lobby for the coliseum that is separate from the convention center lobby. "You can have monster trucks going on in the coliseum and a black-tie function in the convention space, City Manager **David Molgaard** said. "We called it the suits and the rowdies. The goal of the lobby was to separate two crowds. A common misconception about the renovations is that the coliseum went untouched, **Molgaard** said. There was no space added onto the coliseum part of the facility, but technical upgrades were made. "We did improvements on the lighting and sound system, **Molgaard** said. "We did a lot of things

# Internet – Newspaper Archives Searches David Molgaard (Articles are in reverse chronological order

(Articles are in reverse chronological order)

people don't see, which is why some people think we didn't do anything. He said there was no market research indicating that the coliseum needed to be expanded. It was the convention center that needed extra space. "We were losing a lot of meetings because it wasn't up to industry standards, and we didn't have the capacity, so they had to go other communities, **Molgaard** said. **Molgaard**, Jones and City Council members saw renovating the facility as a way to bring economic growth to the capital.

In February 2013, The Charleston Gazette Opinion page published an editorial in favor of renovating the facility, calling it an "economic engine that brings in an estimated \$580 million a year. It also said the facility lost about \$28 million in bookings because it can't accommodate some groups. "I think there was a clear recognition that the facility looked tired and dated, **Molgaard** said. "More importantly, there was a recognition that we could bring more people into Charleston and that this could be an economic driver for our community, if we were able to expand and update it.

In 2003, the City Council began to have "visioning sessions. One of the exercises was to imagine what they would want the newspaper headlines to be 10 years down the road. Renovations on the Civic Center made the top of most everyone's list. After doing some market research, it was determined that the facility would need 20,000 square feet of ballroom space and at least 5,000 square feet of meeting space. Silling and Associates came up with a rough estimate of \$20 million to add on a ballroom. The city discovered after more research that this was a modest estimate. There were about \$30 million in updates for the ventilation system alone, **Molgaard** said.

The city set up a design contest with three teams. The budget was expanded to \$60 million. **Molgaard** said this number was slightly optimistic, but a necessary benchmark. "If you didn't give them a target, who knows what they would be designing to, **Molgaard** said. "They could've designed the Taj Mahal, made out of marble and gold. Local firms BBL Carlton and ZMM Architects and Engineers, along with Atlanta-based firm tvsdesign, won the bidding with an estimated budget of \$72 million. **Molgaard** said this was the lowest cost of all the teams, but also the best design.

The facility was financed through a Tax Increment Financing (TIF) district and a half-percent sales tax. As of now, the total cost of the project is \$110,377,046.87. **Molgaard** said there were some unanticipated costs along the way, but those costs were funded completely by the city. "In the old days, you could have gotten outside money from grants, or from the state, Jones said. "But those days are over. So, we had to do it ourselves.

Robertson said the renovations were an investment worth making. They will help attract more conventions to the city and bring in more tourism. "The city already recognized what [the Convention Center] was, what it contributed to the community, Robertson said. "They realized what it would bring in, and this was probably the biggest bang for its buck.

# Internet – Newspaper Archives Searches David Molgaard (Articles are in reverse chronological order

(Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **David D. Molgaard** is listed below.]

Danville Register & Bee (VA) April 23, 2018

As health insurance costs increase, city of Danville eyes clinic for employees Author/Byline: John Crane

**David Molgaard**, city manager for Charleston, West Virginia, said his city has an off-site clinic for its employees run by a third-party provider, which saves Charleston more than \$500,000 per year. The city started it about a decade ago due to rising health care costs, **Molgaard** said. "We wanted to take a more pro-active involvement in trying to contain rising health care costs and also to provide benefits to our employees," **Molgaard** said. "We saw it in our best interest to create an environment where we could have a healthy workforce." An employee visit to the city's clinic — or wellness center — cost Charleston \$56.63 while a visit to a doctor outside the clinic cost \$121.01 in 2016, **Molgaard** said, citing the most recent figures for the city. Those costs have likely gone up, he added.

**Molgaard** said the city set up its plan so that employees could go to its wellness center during work hours without subtracting from their annual or sick leave. "It really helps our bottom line in terms of employee productivity," he said. "There's no billing involved. Our employees are not charged a co-pay or deductible and so that is a benefit to our employees." There's no overhead in terms of billing insurance, he added. It's covered by the city. "We're self-insured," **Molgaard** said. The city has about 98 or 99 percent usage and is looking to add hours because it's so well used, he said.

## Internet – Newspaper Archives Searches David Molgaard (Articles are in reverse chronological order)

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State Journal, The (Charleston, WV) April 9, 2018

Changing course: Officials, business leaders look for ways to battle Capital City's shrinking population

Author/Byline: Rusty Marks

From 2016 to 2017, Kanawha County lost more than 2,800 people, according to a recent report from the U.S. Census. Of all the counties in the nation, Kanawha had the 10th highest population loss during that time period. That many people leaving the county means Kanawha lost about 1.5 percent of its 2016 population, which Census data show was estimated to be 186,097.

Christiadi, a research associate from West Virginia University's Bureau of Business and Economic Research who goes by one name, says Kanawha County's population loss is nothing new. "The population loss has been taking place since at least 2000, with one or two years of exemption," Christiadi said. "But more importantly, in the last three years the county has experienced a loss of more than 1 percent of its population each year. That's a big loss."

Continuous losses in population have created difficult situations for county and city governments, particularly the state's capital city. Charleston City Manager **David Molgaard** said the city's business and occupation taxes have remained stagnant for the past several years, hovering around \$40 million a year, and officials have been relying on one-time monies to help balance the city's budget.

Changes are also starting to appear in city employment. **Molgaard** said the city service fee — a \$2.50 weekly payroll deduction for people who work inside Charleston — is also bringing in less money than in the past. He said city officials had been estimating the fee based on a figure of 52,000 full-time workers in Charleston, but have revised that number down to 49,000. He's not sure if the drop in service fee revenue is due to people moving out of town or fewer people working because of the bad economy.

Longtime Charleston businessman Brooks McCabe, who is a columnist and consultant for The State Journal, said he is also seeing the results of a poor economy and shrinking population. "You can see it almost immediately in the city's budget," McCabe said. He said Charleston officials are caught in a cycle of decreasing revenue and an increasing need for city services. As more and more people lose jobs or become homeless, "they go where the services are, and the services are here," McCabe said. More people on the streets also mean more money spent on police.

Christiadi said Kanawha County's recent population change has coincided with the larger trend of the state's population decreasing. He said the majority of the county's population loss can be blamed on outmigration. This means there are more people leaving the county than there are coming into it. Some of those people, Christiadi explained, have gone to other nearby counties like Putnam and Jackson. Whether people move back into the area in the future "depends mainly

## Internet – Newspaper Archives Searches David Molgaard

(Articles are in reverse chronological order)

on what happens to the economy," Christiadi said. "We only rely on migration for a population increase, based on the age structure, because we are so high on the elderly population. In terms of natural growth, we continue to see the number of deaths outweigh the number of births. That's going to last for a while." "We've kind of got the double-whammy here in Charleston," McCabe said. Bad economic conditions combined with a shrinking population have created the worst of both worlds, he said. But McCabe sees that's changing. "What is happening right now is we've hit bottom and we're rebooting," he said. "This is an exciting time for anyone who has the perseverance to jump in and make a go of it."

**Molgaard** said Charleston needs to replace its aging housing stock and take advantage of its downtown to attract new residents and keep young people from leaving for other opportunities. "I think we have an eminently walkable downtown, with great entertainment venues and retail establishments," **Molgaard** said.

What the city doesn't have — and what many cities have successfully created — is downtown living space. "I've sat in on a lot of focus groups," **Molgaard** said, adding that, according to a 2015 study, Charleston needs to create affordable downtown housing. "People want to live downtown," he said. "They want cool apartments, and we don't have that in Charleston." **Molgaard** thinks adding a residential component to downtown Charleston will be one of the missing pieces to attracting new residents and convincing young professionals to stay in the area.

McCabe sees the promise of major growth on the horizon for Charleston and Kanawha County. He said an expansion of the Charleston Civic Center, set to be finished next year, will have a major impact on the city's image. A new library is supposed to open the following year. And McCabe expects hotels and office buildings to follow. "We're going to get through 2018. We will struggle through 2019. But 2019 will be the turn-around," he said.

In 2019 through 2025, McCabe said, the new petrochemical industry, based on the state's vast Marcellus and Utica Shale reserves, will really take off, and the region can expect to see a revived chemical industry, ethane crackers and a natural gas liquids storage hub come to fruition. "I'm optimistic," McCabe said. "I think the next 20 or 30 years, West Virginia and Charleston will experience growth faster than the rest of the U.S. The time to invest is when there are storm clouds. Now is the time for opportunity."

## **Internet – Newspaper Archives Searches David Molgaard**

(Articles are in reverse chronological order)

Charleston Gazette-Mail (WV) March 21, 2018

### Council approves \$100M budget

Author/Byline: Lori Kersey

In a special meeting Tuesday, Charleston City Council approved the city's \$100 million budget for the 2018-19 fiscal year beginning in July.

With revenue declining, the city is balancing the budget using \$3.8 million that had been put aside for the EDGE project with the Charleston Urban Renewal Authority. The project is on hold, City Manager David Molgaard said. The project, aimed at bringing young talent to town and providing them with affordable housing, would have meant renovating the long-vacant Dupont Hotel property at the corner of Summers Street and Brawley Walkway. CURA owns the property.

The second and third floors were to be used for the EDGE project, while the first floor was to be leased for retail and restaurant space. EDGE stands for Early Dynamic Guided Engagement. Under the program, sponsors could have subsidized rents at the facility for their employees while they participate in a three-year community leadership program.

The new budget also includes a \$3 increase in the city's refuse fee, which Council approved with a 21-6 vote at its regular meeting Tuesday. While Mayor Danny Jones has said the fee increase is needed in order for the city to continue distributing trash bags to residents each year, some council members have argued that the fee increase is needed regardless of whether council decides to continue buying the trash bags. The city last increased its refuse fee from \$10 to \$15 per month in 2002. Councilman Jerry Ware said if the city raised the fee just to keep up with inflation, the fee would be \$20.41 per month today.

**Molgaard** said the city's health care cost projections are up from \$13.1 million last year to \$17 million in this budget. Business and occupation tax revenue is down this year from \$45 million to \$43.5 million.

This year's budget also includes about \$1.5 million less for capital maintenance like paving and facility maintenance than last year, Molgaard said. The budget does not include raises for city employees but also does not include an increase in health care premiums, Molgaard said. The budget also includes adding a fifth ambulance for about \$473,000, Molgaard said.

Council will meet again at a special meeting in April to set the property tax levy rates, **Molgaard** said. Molgaard said the state must also approve the city's budget.

## **Internet – Newspaper Archives Searches David Molgaard**

(Articles are in reverse chronological order)

Charleston Gazette-Mail (WV) May 2, 2017

### City taps health care reserve to cover police, fire - benefits

Author/Byline: Ali Schmitz

The city of Charleston will dip into its health care reserve fund to pay for police and fire retiree health benefits. Charleston City Council voted Monday night to amend the citys 2016-2017 general fund budget to pay for \$2 million worth of retiree health benefits. Police retirees will receive \$1.2 million out of the fund, while fire retirees will receive the remaining \$800,000. The move brings the amount of funds in the reserve fund, which was created in 2005 after an increase in health claims, from \$9.7 million to \$7.7 million, City Manager David Molgaard said.

The city may also propose another similar budget amendment in excess of \$1 million.

**Molgaard** said the city pays about \$225,000 a week for health care claims. The city also has had to pay some significant claims over the past few months, including one \$800,000 claim, **Molgaard** said. He said thats not typical for the city. He said currently the active employee costs appear to be within the current fiscal year budget, but with 10 more weeks remaining in the fiscal year the city may have to dip into the reserve fund again.

The city budgeted nearly \$2 million more for health benefits for the next fiscal year. Benefit costs have gone up and down over the last decade, and Molgaard said its hard to predict if claims will rise in the next budget year. If this is a spike and it goes back down, we should be in good shape, Molgaard said. If its another year where these numbers start staying more constant, were in a position to make a mid-year adjustment.

## **Section 7**

## Internet – Newspaper Archives Searches David Molgaard

(Articles are in reverse chronological order)

Times West Virginian (Fairmont, WV) April 25, 2017

#### Charleston works on homelessness issue

The issue of homelessness in Charleston has become evident to residents and the city's leaders say they are struggling to solve it. The Charleston Gazette-Mail reports Mayor Danny Jones said Charleston is a mecca for people who have "taken over our streets." His comments came during a recent city council finance meeting and he has continued to discuss the topic on his local radio show.

City Manager **David Molgaard** says the goal is to improve Charleston and that the city isn't looking to cut funding for social services or hurt the homeless. One local nonprofit director has said Jones' comments were irresponsible and misguided. In January 2016 Jones ordered the dismantling of "Tent City" near the Spring Street Bridge where about 20 to 30 people lived in an encampment.

## Internet – Newspaper Archives Searches David Molgaard

(Articles are in reverse chronological order)

Charleston Gazette-Mail (WV) March 22, 2017

### Council OKs \$96.2 million city budget

Author/Byline: Unknown

In a minutes-long special meeting with no discussion, the Charleston City Council on Tuesday unanimously approved the city's budget for next year. The \$96.2 million budget, which the council's finance committee chairman has called "modest, is up more than \$1.6 million from the current budget.

Most of those increased expenditures will go toward resolving health care claims, most of which were filed by retired employees, according to City Manager **David Molgaard**. According to previous reports, of all the expenditures under personnel services, which include health care, retirement, wages and salaries, the total increase going into the 2017-18 fiscal year is about \$1.2 million. The spike in health care costs will be offset by about \$582,000 in wage and salary savings.

**Molgaard** said last week that the city previously budgeted employee positions at the top of the pay scale, but that it's no longer doing that. Instead, about \$400,000 will be set aside in a compensation initiative fund for considering future salary adjustments according to the city's performance management system.

There isn't much projected change in the city's business and occupation tax revenues, but the city is expecting property tax revenue to increase by nearly \$692,000.

The council will meet again at 7 p.m. on April 3.

# Internet – Newspaper Archives Searches David Molgaard (Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **David D. Molgaard** is listed below.]

Charleston Gazette-Mail (WV) January 18, 2017

### Jones seeks pay raise for next mayor, City Council

Author/Byline: Elaina Saube

Another budget amendment for \$95,000 in revenue is coming from a settlement between the city and Ohio Valley Spray Foam, a company that the city sued in 2015 after numerous leaks were found at the North Charleston Community Center and the Martin Luther King Jr. Community Center, resulting in widespread water damage. Ohio Valley installed spray foam roofing at the centers in 2006 and 2007.

The city also recognized funds it received from the America's Best Communities competition after it failed to advance to the final round last year. "They actually gave us \$25,000 as a consolation prize for getting as far as we did in the competition, City Manager **David Molgaard** said.

The Charleston Area Alliance is receiving \$15,000 to go toward expenses for street fairs on Capitol Street. The city will put the remaining \$10,000 toward developing a strategy to market the EDGE project concept to prospective participants, **Molgaard** said.

## **Internet – Newspaper Archives Searches David Molgaard**

(Articles are in reverse chronological order)

Charleston Gazette-Mail (WV) November 8, 2016

### City Council shores up police, fire pensions

Author/Byline: Elaina Sauber

Charleston City Council voted Monday to allocate a portion of leftover money from the last fiscal year to help fund police and fire pensions. After learning earlier this year that the unfunded liability for uniformed police and fire employees hired before June 1, 2011 had increased by \$40 million from the previous year, the city went into crisis mode, Finance Director Joe Estep said. The Gazette-Mail reported on the increase last month when an actuarial study prepared by Gabriel, Roeder, Smith and Company estimated the plan's shortfall jumped from \$277 million to \$318 million. When city administrators began to close out the books for the previous fiscal year's budget, however, it became clear that enough money was left over to help supplement the city's contribution to the pension plans.

In a budget amendment that Council passed Monday, \$457,253 was allocated to the Charleston Police Department for pensions, and \$384,533 was transferred to the Fire Department for employee pensions. "We're fortunate that we had money to reallocate, because we basically manage very conservatively throughout the year in terms of how we budget, our pay scales, and that type of thing, City Manager David Molgaard said Monday evening.

A major reason for the jump in unfunded liability is because the company that prepared the actuarial study used updated information to gauge employee life expectancy. That data table hadn't been updated since 1994, Estep said. Because life expectancy is higher now than it was 20 years ago, it can be assumed the number of people receiving retirement benefits exceeds the number of those contributing to the plan, causing the estimated shortfall to increase. Also on Monday, Dr. Michael Brumage, executive director of the Kanawha-Charleston Health Department, gave an update to City Council's Finance Committee on the progress of the county's harm reduction program. The program provides clean needles to drug addicts who bring in their used needles for safe disposal, Brumage said, but that is just one aspect of the program.

Since the program began in December 2015, it has provided services to more than 1,200 people, Brumage said. They see about 20 new patients every week. "That returned needle is currency for them, for which they get new needles, Brumage explained. "Our patients tell us that they've actually seen the number of needles disappear from public spaces, because they pick them up and bring them in to use them for currency. On Monday evening, Jim Strawn presented this year's Live on the Levee 50-50 raffle contributions to five local charities. Covenant House, Manna Meal, the Religious Coalition for Community Renewal, Roark Sullivan Lifeway Center and the YWCA each received a check for \$1,528.

## **Internet – Newspaper Archives Searches David Molgaard**

(Articles are in reverse chronological order)

Charleston Gazette-Mail (WV) October 24, 2016

## SUSTAINABILITY IN CHARLESTON City has no set goals, - but still is taking significant steps

Author/Byline: Elaina Sauber

Unlike the nine cities profiled in a recent report from the National Academies of Sciences, Engineering and Medicine, Charleston doesn't have a clear set of goals or methods to help improve sustainability in the future. The report, which includes cities such as Pittsburgh, Philadelphia and Chattanooga, Tennessee, studied the different efforts they've made to bolster environmental, economic and social sustainability. While there's no cookie-cutter approach to making a city more sustainable, the report recommends cities should at least develop a plan that highlights their unique characteristics and adapt strategies that have worked in other places with similar traits.

Pittsburgh has not only an office of sustainability but also a climate action initiative that's been in place since 2008. The action plan outlined goals of a 10 percent energy use reduction in cityowned buildings by 2015 and a 50 percent reduction by 2030. Pittsburgh also buys 15 percent of its electricity from renewable energy sources, including solar, on its facilities.

But just because Charleston doesn't have a tenable plan or specific goals to increase sustainability doesn't mean it's not making efforts to be more energy efficient, City Manager David Molgaard said. "We do focus on, and are cognizant in everything we do, of the need to do things efficiently, Molgaard said. "If we can do that, that translates into being sustainable. One example of that, he said, is the ongoing massive renovation project on the Civic Center, the largest city-operated facility. The design-build for the nearly \$90 million project ensures the facility will be 30 percent more energy efficient, Molgaard said.

The city is also pursuing LEED certification, which stands for Leadership in Energy and Environmental Design, for the Civic Center once the renovation is complete. The certification is outlined in the report as one of the indicators of social sustainability. Charleston's efforts to improve energy efficiency aren't just limited to the Civic Center. Clarence Terry, a maintenance supervisor for the city's facilities, has helped implement various improvements to energy use in city-owned buildings. "[Terry] and his crew have been replacing [heating and cooling] units throughout the city with more efficient units, Molgaard said. They also replaced the boilers in City Hall with units that are up to 50 percent more energy efficient and updated the boilers at the Appalachian Power Park building at 601 Morris St.

In addition, Molgaard said the city is in the process of changing out all its light fixtures to lightemitting diodes (LED), which cut energy use by roughly 80 percent. The city has looked into transitioning its street lighting, but most of Charleston's street lamps are leased through Appalachian Electric Power, Molgaard said.

## **Internet – Newspaper Archives Searches David Molgaard**

(Articles are in reverse chronological order)

Another major piece of the sustainability report looks at improved stormwater infrastructure. Like many older cities, Charleston has a combined sewer system, which means buildings' sewage and used water is served by the same pipe system that collects surface runoff during rain events. Combined sewage overflows can cause serious water pollution issues, and the Charleston Sanitary Board is in the process of replacing the combined systems throughout the city. But that solution is expensive and takes years to complete. Cities can take advantage of shorter term "greening solutions that help retain rain water from overwhelming their sewer systems."

Philadelphia has made major strides to improve stormwater infrastructure. The city installed devices that allow stormwater to percolate into the soil whenever possible. Instead of non-porous surfaces that simply collected water, Philadelphia invested in vegetated basins to retain water, wetlands, planters, rain gardens and other devices. Over the past half-decade, Philadelphia "greened thousands of vacant lots and planted more than 120,000 trees to manage stormwater.

Molgaard said the upcoming one-mile bike lane that's planned for Kanawha Boulevard between Patrick Street and Magic Island will have "bioswales, or a green buffer that separates motor vehicles from the bike lanes. "They'll be engineered in a way to retain some of the water, he said. The area's clay-heavy soil also adds to drainage issues, **Molgaard** said.

Like many other cities, Charleston is also aggressively pursuing a "complete streets initiative to make city streets more accommodating to pedestrians and cyclists. The city of Pittsburgh, for example, has created a network of bike lanes around the city to encourage cycling, which means fewer emissions from motor vehicles. Chattanooga offers bicycles for people to rent, with pickup and drop off locations around the city.

Over the next decade, **Molgaard** said improving the city's bike network will be a major focus. "I think probably the most visible thing we'll be doing is implementing the pedestrian and bike master plan. That involves identifying and creating dedicated facilities for [those] activities throughout the city. In the long run, Molgaard said he hopes to see improved bicycle connectivity to Kanawha State Forest and South Charleston.

## **Internet – Newspaper Archives Searches David Molgaard**

(Articles are in reverse chronological order)

Charleston Gazette-Mail (WV) October 18, 2016

#### **Council to refinance Power Park bonds**

Author/Byline: Elaina Sauber

Citing a drop in interest rates, Charleston City Council voted to refinance the city's bonds with the West Virginia Economic Development Authority on Appalachian Power Park during its meeting Monday. City Manager **David Molgaard** said the city is roughly halfway through its 20-year lease for the bonds. "By refinancing, we can save probably \$400,000 to \$450,000 over the remaining life of these bonds, he said. West Virginia Baseball, LLC., which owns the West Virginia Power, also makes payments on the bonds through a sublease with the city. The company asked to borrow additional money to update the ballpark's digital scoreboard. Those upgrades would cost between \$700,000 and \$800,000. "The team will actually be paying for the debt service on those additional moneys over the next 10 years, Molgaard said. The agreement also extends the city's lease with the team. "They wanted to make sure they were in that stadium for an additional five years beyond our 20-year lease with the team, **Molgaard** said. The team's lease payments for those five years will be reduced from \$250,000 to \$200,000, "but by that time, we'll have paid off the bonds, he added. "It's really a win-win for everybody, Molgaard said. The team's lease payments to the city primarily are used to pay off the bonds, which were granted in 2004 and used to pay for the ballpark's construction. Molgaard also discussed a change order to the Charleston Civic Center design-build project on Monday. The majority of a \$130,000 change order that Council approved is going toward streetscape changes on Clendenin Street outside the Civic Center. Molgaard said Clendenin Street will be reduced from four lanes to two lanes, with curb bump-outs installed on the side nearest to Charleston Town Center mall. A bump-out is an extension of a sidewalk into the street and is commonly used to shorten pedestrian crossing distances. Molgaard said workers will also install an elevated crosswalk, also known as a speed table, for pedestrians walking to the Civic Center from the mall. Another piece of the change order is for upgrades to the facility's air conditioning system, which was completed ahead of schedule due, in part, to the upcoming Garth Brooks concerts. "We had a choice of either expending money to make repairs on an old system that was going to get replaced in a few months, or spending that money to accelerate it by paying overtime for them to get the work done early for this concert, so we elected to just ... get it done early, Molgaard said.

Also on Monday, City Council voted to approve a \$23,000 purchase to Reviewsnap, a web-based performance management system that will be used to track and evaluate city employees. Charles Thompson, the city's Human Resources director, said the program "puts a mechanism in place to where our supervisors and managers can basically establish expectations and monitor the performance of their employees throughout the course of the next year. As the city works to bring the program online over the next few months, it will develop the criteria by which to evaluate employees. "The goal is to sit down with every employee and outline the criteria and expectations for the upcoming year so they're well informed about what's expected of them, Molgaard added.

## Internet – Newspaper Archives Searches David Molgaard (Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **David D. Molgaard** is listed below.]

Charleston Gazette-Mail (WV) October 17, 2016

### **CHARLESTON** City gives big raises after study

Author: Elaina Sauber

After the conclusion of a monthslong compensation study completed by an independent consultant, some city department heads received raises of more than \$20,000. City Manager **David Molgaard**, among those who received a significant pay raise, said he thinks the increases are warranted, based on the consultant's suggestions that many positions were underpaid. "We weren't keeping up with what the market would demand," he said. The compensation study, completed by Management Advisory Group International, LLC at a cost of \$43,000, sought to determine an "appropriate classification and compensation system and pay plan based on current compensation levels for similar public sector employers, municipalities, and local market competitors, according to the report's executive summary. Nearly all of the city's roughly 450 employees received some sort of raise after the study concluded.

The city had set aside roughly \$1.5 million, before the current budget was approved, to be allocated to respective positions pending the results. "Knowing this study was moving forward, we didn't know what the exact results were going to be, so we were committed to tailoring whatever outcomes that might have come out of that ... based upon funds we set aside, **Molgaard** said. About 12 percent of the total amount spent on raises went to 25 city department heads. **Molgaard** said the consultants determined new pay ranges based on what the positions are paid in the marketplace in other comparable cities, using a formula that took into account the new pay ranges and the years of tenure to help develop how much each employee's raise should be.

Civic Center General Manager John Robertson received the largest raise - \$32,600 -with a new salary of \$140,759. "His position experience was over 30 years, so that takes him automatically up to the top of the [pay] scale, **Molgaard** said. Robertson is the only department head who received the proposed maximum salary recommended by the consultant. **Molgaard** and City Attorney Paul Ellis each received raises of more than \$21,000. Their salaries are now \$168,500 and \$129,900, respectively.

Charleston Mayor Danny Jones said he doesn't take issue with any of the raises. "I think [Molgaard] would be impossible to replace," the mayor said Friday. "If you look around the country, he's a very active city manager and runs a big government in a capital city, and I have no problem with that." Jones added, "The more you pay people, the better people you get." Molgaard said originally, his position was not part of the compensation study. The consultants were asked to add it later on, rather than depending on market benchmarks provided by the International City Manager Association. "I felt it would be better if the consultants made that call," Molgaard said. "What we put in place is good for everybody ... based upon rational facts

## Internet – Newspaper Archives Searches David Molgaard

(Articles are in reverse chronological order)

and analysis." None of the raises were based on performance, **Molgaard** said, but they will be in the future. At the consultant's recommendation, the city is moving to an open range pay structure for non-uniformed employees. An open range structure gives raises based on performance as opposed to a step plan structure, which gives raises based on tenure.

When asked whether open range pay structures might be too subjective, **Molgaard** said the city's human resources department is looking into programs that would track and manage employees' performance throughout the year. "We will sit down with each employee and identify criteria by which they'll be judged, he said. That won't happen until early next year, and any future raises for employees are "at least a year away, he added.

Jones said that he also doesn't think performance-based raises will cause issues. "I'll be here two more years - I'll address any problem that comes from people if there's really a concerted effort to try to make changes, he said. The study marks the first time the city has adopted major changes to its pay plan and salary adjustments since the mid-1990s.

#### City department head raises

Most of the city's 25 department heads received raises following the conclusion of a compensation study done by Management Advisory Group International. The city set aside roughly \$1.5 million dollars from the budget's general fund pending the results of the study. Last month, City Council approved budget amendments to the general fund reflecting pay raises to each respective department. About 12 percent of the \$1.5 million went to raises for department heads.

Department Name Max. proposed Original salary New salary City manager **David Molgaard** \$198,062 \$147,486 \$168,503

## **Internet – Newspaper Archives Searches David Molgaard**

(Articles are in reverse chronological order)

Charleston Gazette-Mail (WV) August 22, 2016

#### Workshop to focus on universal design in Charleston

Author/Byline: Elaina Sauber

As city planners and community organizers search for ways to make Charleston a haven for both its aging residents and younger visitors, a set of concepts will drive that conversation at an upcoming workshop. Create West Virginia and Partnerships in Assistive Technologies (PATHS) are partnering with the RL Mace Universal Design Institute to host a two-day workshop on how Charleston and residents can benefit from adopting universal design concepts in construction and renovation projects.

Universal design is outlined in seven broad concepts that encourage infrastructure, buildings and environments that are accessible to everyone, including aging populations and those with disabilities. Those principles include equitable use of facilities (curb ramps), flexible use (accommodating right- and left-handed users), and low physical effort (door handles instead of door knobs).

The idea was first coined by architect Ronald Mace, describing it as making all products and the built environment aesthetic and usable "to the greatest extent by everyone, regardless of their age, ability or status in life. Sarah Halstead, co-founder of Create WV, said those principles can be used in Charleston and across West Virginia "to guide us as we prepare places, people and products for 21st century markets. "That will keep us authentic in our development and keep us from making mistakes other places have made, she said. The free workshops will run from 9:30 a.m. to about 5 p.m. on Aug. 30 and 31 at Taylor Books.

But the main goal of the sessions is to prepare Charleston for a collaborative conference at the Civic Center in May 2017 called Universal Design: Live and Learn. City Manager David **Molgaard**, who plays a major administrative role in many of Charleston's construction and infrastructure projects, is among those who will attend the workshop.

Molgaard said when he first read about universal design, "I was intrigued and struck with how similar it is to the things we've been moving toward with our vision for the city. Molgaard used City Hall as a prime example of where universal design could be used. To get to Molgaard's first-floor office via walker or wheelchair, a person must go around to the back of the building near the police department and take an elevator to the third floor to gain access to another elevator back down to the first floor.

But universal design goes beyond Americans with Disabilities (ADA) compliance. "It also takes into consideration the adaptability of environments ... it's not just designing for one group of people, it's designing for everyone, she said.

## **Internet – Newspaper Archives Searches David Molgaard**

(Articles are in reverse chronological order)

Charleston Gazette-Mail (WV) March 23, 2016

#### City Council OKs \$94 million budget

Author/Byline: Elaina Sauber

The 2017 fiscal budget is the strongest **David Molgaard** said he has seen since he began as city manager more than a decade ago. "We've had a number of good budgets, but this one is right up there, he said. It took City Council less than five minutes to pass the next year's budget on Tuesday, which outlines a \$5.6 million revenue increase from business and occupation taxes, the increased city service fee and sales tax hike. With a \$94 million budget for the next fiscal year, the city is anticipating a nearly 23-percent increase in user fee revenues, or an additional \$1.25 million. The total \$6.7 million generated from the user fee goes toward street projects and police services. The half-cent sales tax increase to help fund police and fire pensions will generate another \$2.6 million. That increase left enough money in the current general fund for the city set aside in a pending account as it waits for the results from a compensation assessment.

While last year's budget included a 4 percent across-the-board raise for city employees, Molgaard said the city hired Virginia-based Management Advisory Group International to lead that assessment in September. The city paid the firm \$43,000 to complete the assessment, which included giving non-uniformed employees questionnaires to understand what their positions entailed, benchmarking those positions with comparable cities and then making recommendations with regard to salaries and pay ranges amid current market conditions, Molgaard said.

Once the assessment's recommendations are finalized, the city will amend the FY 2017 budget and allocate the \$1.9 million in its pending account to the appropriate departments. "When pay ranges aren't broad enough, people rise to the top of the pay scale, with nowhere to go except for applying for another position internally or leaving our employment for [somewhere else] that pays market rates, Molgaard said.

The city also is projecting more than \$45 million in B&O taxes in FY 2017 - a 2.5-percent increase from last year. City Finance Director Joe Estep said B&O taxes, which are collected from gross revenues on a quarterly basis, comprise nearly half of the entire budget. Utilities such as electric, natural gas and water companies pay the highest B&O tax rates, between 3 and 4 percent, Estep said. The city also is paying nearly \$240,000 less into its Public Employees Retirement System due to a lower required contribution rate. The retirement system's board specifies annually how much the city must contribute to its retirement fund for non-uniformed employees, Estep said. That rate, which was 14.5 percent this year, was lowered to 12 percent for fiscal 2017. Mayor Danny Jones said the bolstered budget is the result of good planning by city officials. "We feel like an oasis of financial tranquility, he said.

## Internet – Newspaper Archives Searches David Molgaard

(Articles are in reverse chronological order)

Charleston Gazette-Mail (WV) January 5, 2016

#### User fee hike to bring \$1.3M more to city

Author/Byline: Elaina Sauber

The recent increase to Charleston's city service fee is projected to add more than \$1.3 million in revenue in the next fiscal year. City Council's Finance Committee voted Monday night to amend the fiscal 2016 budget to reflect a 50-cent increase to the city service fee. The service fee, also known as a user fee, will now charge \$2.50 per week to everyone who works in the city limits, regardless of residency.

City Manager **David Molgaard** said at the meeting that the amendment will budget about \$620,000, or six months worth of that increase for the remainder of the fiscal year ending June 30. About \$18,000 of that will go toward replacing a police vehicle that was totaled in an accident, **Molgaard** said. The user fee, which previously brought in more than \$5 million in annual revenue, may only be used for street maintenance projects or police services.

City Finance Director Joe Estep explained after the meeting that roughly \$1.65 million is allocated from user fee collections and placed into a capital outlay projects fund. That money is used for the city's annual paving program as well as retaining wall and slip repairs. "If any of these things affect the stability of the road, then it [comes from] the user fees, Estep said.

The user fee also covers the cost of smaller projects such as potholes and curb repairs, as well as purchasing salt and snow removal. "We pay \$450,000 to buy salt every year, and last year it cost us \$200,000 in manpower to put it down, Estep said. The remaining money from user fee revenue stays in the general fund and is meant to offset expenses relating to street maintenance or police services.

Estep said when he puts together the fiscal 2017 draft budget, the increased user fee revenues will likely project around \$6.7 million. "Then, council will decide how they want to divvy that up, he said.

# Internet – Newspaper Archives Searches David Molgaard (Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **David D. Molgaard** is listed below.]

Charleston Daily Mail (WV) March 18, 2015

### Charleston Area Alliance's community awards announced

Author/Byline: Unknown

Fourteen businesses, groups and people were honored by the Charleston Area Alliance at the eighth annual "We Love Our Community awards.

"We are honored to shine a spotlight on the best of Charleston, said Susie Salisbury, the alliance's vice president of community development. "These awards highlight outstanding community commitment and showcase exemplary development projects. Their work and dedication helps build a more vibrant community and prosperous economy.

The awards are sponsored by City National Bank. Winners include:

\* Servant Leader Award: **Dave Molgaard** was honored for his outstanding leadership as a public servant in the Kanawha Valley. **Molgaard** has served as Charleston's city manager for more than 10 years and spearheaded many economic development projects for the city, most recently the EDGE project which focuses on attracting young talent to the city.

## **Internet – Newspaper Archives Searches David Molgaard**

(Articles are in reverse chronological order)

Charleston Daily Mail (WV) March 10, 2015

#### CHARLESTON CITY COUNCIL Council passes \$89 million - budget

Author/Byline: Matt Murphy

Charleston city council passed the city's \$89 million budget for fiscal year 2015-16 Monday night, but first discussed budget amendments concerning pay raises, Main Street groups in the city and libraries. Council ultimately voted to go along with the mayor's administration's pay raise option, which will give all regular city workers a 4 percent raise - the first raise since 2012. The other option, introduced by East End Democratic Councilman Robert Sheets, would have given every employee a flat \$1,600 wage increase.

Sheets said that increase was meant to provide a greater financial boost to workers who make less money and commented that many city administrators make more than higher-ups at the county and state levels. In addition, as the cost of living increases, lower-income workers are affected more than people who make more money. "It hurts those who don't have very much income he said. However, City Manager David Molgaard said across-the-board percentage raises allow the city to be competitive in keeping and retaining talent. The city uses a pay grade classification system for employees. "Our philosophy is pay grades reflect skill level and duty level, he said. Molgaard also said the city is below the national median for wages for various positions, ranging from refuse workers to its traffic engineer, though Molgaard also said that doesn't factor in other factors like cost-of-living.

Council's Finance Committee voted down Sheets' proposal. Also in Finance Committee, West Side Democratic Councilman Ed Talkington wanted to give West Side Main Street and East End Main Street equal funding to the tune of \$50,000 for each organization. Currently, West Side Main Street receives \$30,000 from the city, while East End Main Street receives \$50,000. The contribution is higher for East End Main Street because West Side Main Street can receive funding through West Virginia State University. However, both organizations are in the middle of a possible merger, and West Side Main Street President Adam Krason said his organization isn't requesting any more funding for the time being as the merger moves forward. In addition, Mayor Danny Jones said he will be asking the Charleston Urban Renewal Authority to start contributing more to both organizations. "I think it's time CURA ponied up, he said. "CURA's got the money. We don't. The extra funding for West Side Main Street ultimately was killed along neighborhood lines in Finance Committee, with Talkington and West Side Democrat Joe Deneault voting for the extra funding and South Hills Republican Bobby Reishman, South Hills Democrat Jack Harrison, At-Large Democrat Jerry Ware, South Hills Republican Susie Salisbury and At-Large Republican Tom Lane all voting against. Council also voted to give an extra \$3,200 to the county library system in light of the receipt of a new valuation report from the Kanawha County Assessor's Office, which affects the formula used to determine the city's contribution to the library.

## Internet – Newspaper Archives Searches David Molgaard

(Articles are in reverse chronological order)

Charleston Daily Mail (WV) November 4, 2014

## CHARLESTON CITY COUNCIL Sales tax hike approved - Rate will increase by one-half cent beginning on July 1 %

Author/Byline: Matt Murphy

The sales tax rate in Charleston will go up next summer after city council passed a one-half cent tax increase Monday night. Earmarked for the city's pension liability, the new tax will take effect July 1. At that time, the effective sales tax rate in Charleston will be 7 percent - the 6 percent state sales tax, a one-half percent city sales tax for renovations to the Charleston Civic Center and the new one-half percent sales tax for pensions.

The tax wasn't without dissent. Eight council members voted no to the tax. They are at-large Republican Chris Dodrill, West Side Republican Adam Knauff, South Hills Democrat Sam Minardi, West Side Democrat Mike Nichols, South Hills Republican Courtney Persinger, East End Democrat Robert Sheets, East End Independent Cubert Smith and Oakridge Democrat Shannon Snodgrass. Republican Susie Salisbury and Democrat Mike Clowser, both of whom represent South Hills wards, were absent.

City Manager **David Molgaard** and Mayor Danny Jones said if the tax was not passed, the city would end up seeing major service cuts in the future. "Without any new or other sources of revenue, we would have to cut expenses somewhere, **Molgaard** said, going on to add, "I believe that if you didn't pass this tonight, we might be able to ... finagle this for the net three years ... but it's going to hit you that much harder.

Charleston has been struggling to find revenue to pay for an estimated \$287 million pension liability. The city is currently enrolled in a "conservation method to meet its pension obligations the fourth proposal introduced by the state government in the last three decades to enable local governments to fund their pensions. The city already pays about \$10.8 million annually to fund existing pension liability. That obligation will end in 2047, when the trust fund is fulfilled for pensions created before the city began its current funding method, city finance director Joe Estep said.

However, that payment won't cover future pension obligations. "Everybody who's retired since the conservation methodology, the sales tax will cover those benefits, **Molgaard** said. The tax is expected to generation \$6.3 million in the first fiscal year it's enacted, and is currently projected to cover pension costs through 2027. At that point, the city will likely need to find an addition funding source unless the sales tax ends up pulling in more revenue than projected. "I don't want to say at this point this is the silver bullet, but it could be, **Molgaard** said. Elsewhere in West Virginia, Wheeling is following the lead of Charleston as its council considers a similar tax increase for pension obligations.

## **Internet – Newspaper Archives Searches David Molgaard**

(Articles are in reverse chronological order)

State Journal, The (Charleston, WV) October 31, 2014

### WV Supreme Court finds in favor of City of Charleston in dispute over overtime pay calculations for firefighters

Author: Unknown

The City of Charleston was within its rights to change the way it calculates overtime pay for firefighters, the state supreme court said. The opinion, authored by Justice Margaret Workman, noted that the firefighters had not provided the court with evidence suggesting the city was contractually bound to calculate overtime compensation in a particular manner or using a certain formula. "This Court has thoroughly reviewed the information provided in the record, and we discern no legitimate basis upon which to conclude that the mathematical formula previously used to divide annual salary into hourly wages created a contractual obligation to use that same formula into perpetuity," she wrote.

The case stems from a change the city made in its overtime calculations in 2011 after City Manager David D. Molgaard's determined they had been using the wrong baseline hourly rate to calculate overtime "and had actually been compensating the firefighters at a higher overtime rate than required." According to his calculations, the city had overpaid as much as \$1.4 million.

The Firemen's Civil Service Commission declined to intervene on the firefighters' behalf, saying their powers are limited to disciplinary proceedings, while a federal judge rebuffed the city's bid for a declaratory judgment, saying there was no controversy under the federal Fair Labor Standards Act.

The firefighters then appealed to Kanawha County Circuit Court, which in June 2013 ruled against them. On Oct. 30, the supreme court upheld the lower court's decision, citing legal precedents that state "a municipality's past practice relating to calculation of overtime pay does not create a contract; that such calculation could be unilaterally altered, with notice; and that the municipality is permitted to revoke or alter policies."

## Internet – Newspaper Archives Searches David Molgaard

(Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **David D. Molgaard** is listed below.]

Charleston Daily Mail (WV) October 7, 2014

CHARLESTON CITY COUNCIL Council OKs funds for new - field Funding for Power Park project comes from unforeseen tax - revenue in June \$%

Author/Byline: Matt Murphy

In other business, council:

\* Heard during the Finance Committee meeting about the city's efforts to collect unpaid refuse and fire fees by listing owed fees online. City Manager **David Molgaard** said the city is owed about \$2.6 million in refuse fees and about \$500,000 in fire fees. The city has posted the names of the worst offenders on its website after sending letters to those debtors. **Molgaard** said the city will begin filing liens and taking legal action against the biggest debtors. In addition, he said, the city plans to ask the state Municipal Home Rule Board to allow the city to require liens be paid whenever a property is transferred.

# Internet – Newspaper Archives Searches David Molgaard (Articles are in reverse chronological order

(Articles are in reverse chronological order)

Charleston Gazette (WV) August 18, 2014

#### Councilman wants to amend higher sales tax bill

Author/Byline: Rachel Molenda

One Charleston city councilman warns that revenue from a proposed increased sales tax could be used for projects other than funding the city's unfunded police and fire pension plans. However, City Manager **David Molgaard** says that's not the case.

East End Councilman Robert Sheets submitted an amendment to a proposed bill that would increase the city's sales tax to 1 percent. Sheets said one section of the bill would provide a "loophole for the city to eventually divert funds from the planned uniform pensions reserve fund to the general fund as it pleases. "My thing is they eliminate that whole clause so that all of it goes to pay what they purport they are doing it for, is to pay down the unfunded pension liabilities, said Sheets of his amendment, which asks to strike the clause in question.

Molgaard addressed questions and concerns regarding the language in an email to council members last week. In his memo, Molgaard said the bill allows for the city to use excess revenue from the fund "when the closed plans are fully funded and the City's only remaining obligation is for contributions to the new plan for the new hires after June 2011 & Molgaard added that those funds must be used to cover the city's contributions for the new plan before it could be diverted for other uses. Mayor Danny Jones proposed raising the city's half-cent sales tax at the Aug. 4 City Council meeting in order to save money for its unfunded fire and police pension plans.

The Gazette reported last week that council members will have only one chance to make amendments to the bill. It will be considered and voted upon by the Finance Committee tonight and then sent to the state's Home Rule Board for approval. The process doesn't sit well with Sheets. "They've done it so that & even council members can't touch it unless they're on the finance committee. The only way the finance committee's going to change is if enough people call them and say they want all this money to go to the unfunded pension liability, Sheets said. But Sheets acknowledged that potentially missing the July 1, 2015, implementation date while waiting for the bill to be passed by full council would be problematic. "If we stop and add this now we lose out for another year or something on it. And they'll vote for it not adding this amendment, Sheets said.

**Molgaard** told city officials the state's tax department starts new city sales taxes on July 1 every year, and a delay on the bill could mean a year of lost revenue. There is nothing in state code that requires cities to vote on a proposed bill before submitting it to the board, which **Molgaard** said "might be a defect in the process that should probably be addressed at some point, because a late amendment could delay any ordinance's passage. The Finance Committee meets tonight at 6:30 p.m. in the AV Conference Room, on the third floor of City Hall.

## Internet – Newspaper Archives Searches David Molgaard

(Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **David D. Molgaard** is listed below.]

Charleston Daily Mail (WV) June 17, 2014

### CHARLESTON CITY COUNCIL Decade of late taxes to go to - projects

Author/Byline: Matt Murphy

A Charleston firm has paid up after failing to pay business and occupation taxes for 10 years, and city officials plan to use the money to pay for facility maintenance and other projects. In all, the business, which city officials would not identify, has paid the city \$3.8 million. About \$1.5 million was penalties and interest. City Manager **David Molgaard** said two tax audits revealed the unpaid funds. He would not give much information about the business in question, saying that the business could be easily identified if just a few details were given.

City code Sec. 110-85 prohibits the city from publicly releasing individual business and occupation tax returns. "It was something that we found that wasn't on our radar, he said. "It was somebody that wasn't paying at all . . . it's a peculiar case - a very unique one.

**Molgaard** proposed putting the lump sum into the facility maintenance fund for specific projects. Council members voted unanimously in favor. "We want to spend it for one-time needs, **Molgaard** said. He said funds could be used to re-sod the field at the city-owned Appalachian Power Park or to help jumpstart the Edge housing project.

Championed by **Molgaard**, the Edge project is a proposed mixed-use building downtown that would provide housing to young professionals who would also be enrolled in a city leadership program. "That piece of that chunk will help us get to the next step, **Molgaard** said. "I think it stands a good chance of happening.

In other business, council:

\* Approved budget amendments, which included the \$3.8 million B&O tax sum and a new employee for **Molgaard's** office. The employee will be an "executive projects administrator who will receive a salary of \$89,116, or \$117,140 if the cost of benefits is included. **Molgaard** said the employee is needed because of the large amount of projects the city is undertaking. He said the city has greatly increased efficiency in operations over the last few years, which helps justify the new employee. "There's just not enough hours in the day for everything coming at us, he said, later adding, "It's a good problem to have.

At-large Councilman Jerry Ware, a Democrat, said he was initially skeptical of the hire, but supported the new employee after talking to **Molgaard** earlier Monday. "When I saw it on (the agenda), I questioned it big time, he said. "I really feel comfortable about this.

## **Internet – Newspaper Archives Searches David Molgaard**

(Articles are in reverse chronological order)

Charleston Gazette (WV) May 5, 2014

City catalyst: EDGE project moving forward

Author/Byline: Rachel Molenda

The construction of the Charleston EDGE building could be part of the redevelopment efforts on the North end of Capitol Street, a recommendation of the Imagine Charleston downtown plan. City Manager **David Molgaard** said it "could really serve as a catalytic project. "We've done a great job over the last 20, 25 years with Capitol Street from Washington Street to the river. It's the first place you take a visitor when you bring them to Charleston, Molgaard said. "But, by the time you get past the Daniel Boone, there's just a lot of vacant lots.

The EDGE - Early Dynamic Guided Engagement - project focuses on attracting young talent to the city and providing them with affordable downtown housing. Sponsors could subsidize rents at the facility for their employees while they participate in a three-year community leadership program. Molgaard said the idea is to get young people to come up with a high-impact project they would implement over the course of that time. "You're not only living downtown, but you're living downtown with a purpose, Molgaard said. "You're making things happen, and you're contributing in a way that isn't available right now in any organized fashion at least. There's a value to that.

The project, which has a grant from the Greater Kanawha Valley Foundation for design and cost estimates, outlines new construction for the housing complex on Donnally and Capitol streets. The building would contain 35 units - seven of which could be two-bedroom apartments - along with program and meeting space, a fitness area and an amenity deck that sits atop ground-level parking. It would be within walking distance of many of the city's anchors, including the Capitol Market, Appalachian Power Park, the levee and the Civic Center. It's also two blocks away from some of the city's popular restaurants and nightlife.

Not counting land costs, the project's development costs are estimated to be \$10.4 million. Rents would have to be more than \$1,300 per month. "When you add utilities, renters' insurance, sewer and garbage & you're looking at number of around \$1,730 a month, Molgaard said. But, Molgaard said that's all the more reason for the city to "buy down or have sponsors that would subsidize some of those costs. "It might be doable for the middle-aged attorney or doctor in this market, but people around here aren't conditioned to those type of rents, **Molgaard** said. That also proves to be challenging when it comes to developing the building, Molgaard said. ZMM's analysis showed Charleston's land costs are high. Buildings like the one conceptualized appraise lower than their construction costs, "so you're already upside-down when you're building one of these things. At a presentation of the project's latest plans, some Generation Charleston members who aren't from the Charleston area weren't phased by a \$1,300 rent, Molgaard said. Those who were from the area were looking for lower rents around \$800 or \$900, "which is what we expected, Molgaard said.

C.

## **Section 7**

## **Internet – Newspaper Archives Searches David Molgaard**

(Articles are in reverse chronological order)

The next phase of the project includes approaching potential sponsors that could be businesses, individuals or foundations looking to bring young talent to the city. Recruiters like the "stickiness of the idea, Molgaard said. "[They like the idea of] attracting people and finding something to keep them here, instead of having this be their first job and then they're off to the big city after they get a little experience, Molgaard said. "If you find a way to ground them in the community, it's more likely that those young people will stay here.

## **Internet – Newspaper Archives Searches David Molgaard**

(Articles are in reverse chronological order)

Charleston Gazette (WV) March 11, 2014

#### Stabilization fund helps city cushion '15 budget

Author/Byline: Rachel Molenda

In the wake of a projected \$2.9 million shortfall at the end of this fiscal year, the city of Charleston is dipping into its stabilization fund to increase projected revenue in 2015. That money - nearly \$1.1 million - will act as a kind of cushion for next year's budget, which was reviewed Monday evening during a special Finance Committee meeting. "It could be that we never have to use the stabilization fund," City Manager David Molgaard said.

Prior to having the stabilization fund, the city balanced its budget by having an "opening balance," which assumed there would be a certain amount of money left over at the end of the year that could be used for the one following, Molgaard said. "That was starting to look like a dangerous game, because you might end up in a situation like we're in this year ... as the money that we had rolling over starts dwindling," Molgaard said. "Now we're at least in a position where we've got the money in the bank." The city last did this in 2013 when it used \$1,544,000 from the fund, which holds about \$5.2 million in emergency funds for the city. This year's proposed transfer accounts for about 20 percent of the fund.

City Finance Director Joe Estep told committee members the city's top 10 revenue sources have fallen flat this fiscal year with only 0.9 percent growth over 91 percent of the city's revenue stream. The city's business and occupation tax - its number one revenue stream - is projected to be about \$1.9 million under budget. The Gazette reported earlier this month that B&O collections, which are based on money businesses in the city take in, have been flat all year.

Property values are lower than expected, which has lead to low revenues from the city's property tax. The city depends on several hundred thousand dollars that property tax - its second largest revenue source - goes up each year. The proposed budget accounts for increased revenue from property taxes, which the city is allowed to increase by 3 percent without holding a public hearing, Estep said. Property tax is the city's second largest revenue source. The tax rate for residential properties would increase from 16.22 cents per hundred dollars of assessed value to 16.98 cents. "On our typical example of a \$100,000 appraised property, which gets assessed at \$60,000, this would increase the annual taxes \$4.66," Estep said. Annual taxes for a Class IV or business property would be about \$9 under the proposed increase. Hotel occupancy taxes - its third-highest revenue stream - are projected to fall short by about a half-million dollars.

Estep's proposed budget takes into account some cutbacks, most of which are in professional services. The Storm Water Management Department found ways to scale back spending for 2015 by about \$300,000 while still being in compliance with federal guidelines. The City Manager's office managed to reduce its budget by \$200,000. 2015 is a big spending year for the city, Estep told The Gazette. The proposed budget addresses increased expenses, such as \$400,000 for city elections, \$500,000 for uniformed pension plans and \$400,000 for its employee health clinic.

## Internet – Newspaper Archives Searches David Molgaard

(Articles are in reverse chronological order)

But, additional money spent on the city's employee health clinic to expand hours are expected to be balanced by decreasing health insurance claims, **Molgaard** said. The proposed budget doesn't include raises for city employees this year, but **Molgaard** told committee and council members who attended Monday's meeting that finding revenue for raises needs to be addressed. City employees have received a raise once in the last five years, **Molgaard** said.

A five-year projection showed a 3 percent raise for each city employee would require the city to come up with nearly \$6 million in additional revenues. But spending is expected to increase by more than \$17 million by 2019. "If we don't keep up 3 percent across the board, at some point we're going to turn around and give a 9 percent or 12 percent raise just to catch up," **Molgaard** said, of a historical analysis of city wage raises during revenue droughts. A projection without raises showed less of a daunting cumulative gap between spending and revenue, but **Molgaard** said it wouldn't bode well for operations. "This would take us out another five years, and there's just no way you're going to operate 10 years without raises for employees," **Molgaard** said.

City officials might have to consider raising city fees to make up for low revenues. **Molgaard** said several significant city fees haven't been raised in a number of years, such as fire fees in 1988 and refuse fees in 2004, despite city code that says Council should raise fees in order to cover service costs. Individuals and entities would have to be charged \$5 more - a 33 percent increase in fees - in order to cover the city's current costs, **Molgaard** said.

"Unfortunately, I think everybody thinks what they're paying is what it costs, and it's not," Finance Committee Chairman Bobby Reishman said. "We're just going to have to look at it, but we're going to have to be reasonable."

## **Internet – Newspaper Archives Searches David Molgaard**

(Articles are in reverse chronological order)

Charleston Gazette (WV) October 23, 2013

### Revenue falling short of projections, Council transfers - funds to close gap Author/Byline: Rachel Molenda

A budget analysis by City of Charleston Finance Director Joe Estep shows the city's budget turning up about \$500,000 short of what was expected, according to City Manager David Molgaard. A budget amendment was passed at Monday night's City Council meeting that allowed \$540,000 of unassigned funds to be transferred to the city's stabilization account, a decision Molgaard described as "prudent" should revenue continue to decline. Last year, the city chose to use its unassigned funds for across-the-board raises for its employees, Molgaard said

While Estep's budget projections showed an increase in revenue for this fiscal year, the numbers aren't showing through. "In the face of declining revenue compared to last year and raising the budget this year, we've obviously created a shortfall," Estep said. In addition to low general revenue, Molgaard said the city's business and occupation tax has brought in fewer funds this year when compared to April through June of 2012. Estep said it is down about \$144,000 by comparison. "At the same time, it's down \$591,000 compared to the current budget," Estep said.

B&O taxes are paid by individuals and entities, which do business in the city, and make up about half the city's \$87 million budget, according to Estep. The amount collected is based on gross revenue, Estep said. If business isn't booming, neither is B&O revenue. "People aren't spending their money," Molgaard said.

The majority of B&O tax revenue comes from retail, services and contractors sectors, Estep said. The service sector - professions such as doctors, lawyers and accountants - brought in \$215,000 less revenue than in 2012, contributing to the shortage, according to Estep. The financial outcome of the B&O tax is difficult to gauge at this point, Estep said. "Because that's a quarterly, self-reported tax, we're not going to be able to tell how the July, August, September business period went until we collect those taxes," Estep said. "It'll be mid- to late November before I have any feel of what this quarter's going to look like." Hotel/motel tax revenue in Charleston is also falling short by about \$140,000 compared to June through August of last year, according to Estep.

Molgaard said the city is looking to long-term solutions to low revenue issues by continuing "to monitor our revenue situation, but we are also closely looking at our expenditures." "We know our obligations are going to increase," Molgaard said, making reference to the city's unfunded liability to police and fire pensions. "We're going to have to do business more efficiently and effectively to meet our obligations." This shortfall in revenue could be temporary, but, for now, the city is playing it safe with its finances, Molgaard said. "We don't know if it's just a dip that will correct itself or that it will continue," Molgaard said. "Right now, I think we've got enough room in our current budget to absorb this current downturn."

## Internet – Newspaper Archives Searches David Molgaard

(Articles are in reverse chronological order)

Charleston Gazette (WV) January 1, 2013

## THE SHAPE WE'RE IN 'We knew we had to move to - prevention' Old city insurance was almost bankrupt

Author/Byline: Kate Long

In 2005, "Charleston's insurance plan was going bust," said City Manager **David Molgaard**. Employees had filed a million dollars more in claims than the city's insurance company had predicted. The next year, employees got a raise, but also got hit by an insurance premium hike that almost wiped out their raise. "We analyzed the claims," **Molgaard** said. "Most were connected to preventable illnesses, such as diabetes and heart disease, so we knew we had to move to prevention." They decided to get creative: start their own employee clinic and pair it with an aggressive wellness program. They dropped Wells Fargo, became self-funded and contracted with Healthstat, a company that provides workplace clinics. They started requiring employees to get checkups. "The first year we required risk assessments, we found six people who didn't know they had diabetes," **Molgaard** said.

In 2009, they added lower-cost pharmacy and mental health benefits. They cancelled the city's \$400,000-per-year stop-loss insurance and put the money in a medical reserve fund instead. They limited claims to \$750,000. "We've never had one that big," **Molgaard** said. By 2010, their claims were below the national average. Claims and administration costs per employee decreased 2 percent in Charleston while the national average increased 24 percent, according to Aon-Hewitt, employee benefits consultant. "But we know it would only take a small transplant to blow our numbers out of the water," **Molgaard** told the Gazette in 2011. In 2012, it happened. Nineteen employees filed large claims, mainly for cancer, of over \$100,000. "Any plan will hit a spike in claims," **Molgaard** said. "The question is, how prepared are you? We got through this year without having to dip into our medical reserves. That's good. Over time, we'll still beat the national average."

With the big claims, Charleston is over the national average per employee for 2012. But without them, the city is still below the national average. "The underlying basics are working," **Molgaard** said. "In the long haul, we'll pay less." "Our pharmaceuticals went up just 4 percent. You want an increase. That means people are taking their insulin and medicine. It costs a lot less than the alternative."

#### Since 2010:

- Employees are given a steep discount (24 percent) if they visit the clinic as often as required. "That's a real incentive," **Molgaard** said.
- They can schedule consults with a pharmacist through the University of Charleston's PharmUC Patient Care Clinic.
- The city offers options such as gym, yoga, zumba, and Weight Watchers.
- Unnecessary ER visits are now slapped with a co-pay.

C.

## Section 7

## Internet – Newspaper Archives Searches David Molgaard

(Articles are in reverse chronological order)

Construction manager George Farley likes the emphasis on fitness. "This is the first place I've ever worked where the management cared whether I was in shape or not," he said. "I spent a lot of years in the coal industry, which has good insurance, but they'll give you a pill and send you down the road. They don't do a lot of assessment of how good a shape you're in. They don't talk to you about what you can do for yourself. And that's important to me now."

## **Internet – Newspaper Archives Searches David Molgaard**

(Articles are in reverse chronological order)

Charleston Daily Mail (WV) August 23, 2012

Official outlines plan to attract younger workers to city - Molgaard says having employers pay subsidy for apartments keeps - rent low, allows for house loan

Author: Paul Fallon

Building an apartment complex on the site of the former Holley Hotel would be just one part of City Manager **David Molgaard**'s plan to attract young professionals to downtown Charleston. Molgaard outlined his plan for members of the Greater Kanawha Valley Foundation during a luncheon meeting Wednesday. "This is about the Holley Hotel and so much more," he said.

The plan calls for businesses to recruit young professionals who want to move to Charleston and live in the downtown area. They would live in two-bedroom apartments in a complex that would be built where the Holley Hotel used to stand along Quarrier Street, near the present day Quarrier Diner. "Younger people are saying it would be great to live downtown but the rent is just too high," Molgaard said.

To keep rent affordable, employers would pay a \$10,000-per-year subsidy per employee under Molgaard's plan. The employee would be asked to pay what Molgaard called "fair market rent" for the apartment. The rent amount would probably be around \$700 a month, he said. Half of the employer subsidy would help cover the rent and pay for maintenance of the apartment complex. The other \$5,000 would be placed into an account that would build up over three years. Employees would stay in their apartments for a maximum of three years so the account would accrue \$15,000 per employee, Molgaard said.

This \$15,000 then would be loaned to the employee to help pay for the purchase of a house in Charleston, he said. The loan would be forgiven if the employee lived in the house for three years, Molgaard said. If the employee moved out of the house, the loan would have to be repaid, he said. Employees would be required to sign leases every year of the three-year period. Neither the employee nor the employer would be penalized if the employee left the company before the three years were up. The businesses could explore whether the subsidy would be considered part of the employee's salary, Molgaard said.

New restaurants and shops have opened downtown, and events like the Live on the Levee concert series and SportsFEST add to the city's attraction, he said. "There's a lot happening," he said. "But we need to get more people downtown to take this to the next level. After hours we don't have that critical mass of people downtown."

The plan is being drafted, and **Molgaard** did not have specific details, including how much the apartment building would cost to construct or how big it would be. He estimated it would cost \$120 to \$200 a square foot to construct. **Molgaard** said the city could enter into a public/private partnership with a developer to construct the building. The city could look into selling lowinterest revenue bonds to borrow money for construction, Molgaard said. "The bonds would be

## Internet – Newspaper Archives Searches David Molgaard

(Articles are in reverse chronological order)

backed by the employers' sponsorships and the rent," he said. **Molgaard** envisions an apartment complex with 40 to 60 two-bedroom units. The city is also submitting an application for grants from the Bloomberg Foundation, founded by New York City Mayor Michael Bloomberg, to help cover the cost of the program. The Bloomberg Foundation will award a \$5 million grant and four \$1 million grants to cities that come up with innovative plans to address issues such as how to make government work better, how to solve a serious problem in a city or how to improve city life.

The grant application is due Sept. 14, and the recipients should be announced in January or February. The grant could be used to help cover the cost of constructing the apartment complex or operating the program, he said. However, the project may move ahead regardless of whether Charleston receives any of the grants. "I think we can make this work without the grant," he said.

**Molgaard** believes businesses have a vested interest in attracting young professionals to the city. "And the businesses would probably spend \$10,000 on recruiting employees anyway," he said. The employees would participate in a three-year program that would foster community activism and get them engaged in the process of making citizens' lives better.

For example, during the first year, the employees would participate in leadership classes like those offered by the Greater Kanawha Valley Foundation, he said. The employees also would participate in the city's community policing program. During the second year, the employees would study social issues such as poverty and drug abuse affecting the city, he said. During the third year, the employees would work on a project to better the lives of city residents, **Molgaard** said. "These people will be the next philanthropists," he said. "They'll be the people we go to for help in the future."

Greater Kanawha Valley Foundation Chairman Ron Potesta believes the program could be very beneficial. "I think this is very exciting," he said. "I think something like this could work." Potesta told **Molgaard** he would approach the board to ask them to work with the city to get the program implemented.

Mayor Danny Jones is also excited about the project. "As a city we need to gear our thinking around young people," he said. "I hope this helps bring young people to the valley."

### Internet – Newspaper Archives Searches David Molgaard (Articles are in reverse chronological order)

Charleston Gazette (WV) April 26, 2013

## OUTDOOR DINING City offers fence, for fee - Under proposed bill, city would maintain fencing on sidewalks \$%

Author/Byline: Travis Crum

Under a proposed planning bill, the city of Charleston would buy and maintain fencing for restaurants that want to offer outdoor dining to customers. Members of Charleston City Council's planning committee met Thursday night to tweak the regulations they passed a year ago that govern outdoor dining in the city's central business district. So far, only two restaurants along Capitol Street offer fenced-in outdoor dining - Bar 101/Ichiban and Adelphia Sports Bar & Grille. There would be more if the cost of installing the fencing weren't so high. So City Planner David Molgaard came up with a compromise. The city agrees to purchase, install and maintain fencing for restaurants if the restaurant owners agree to pay an annual \$500 administrative fee. "We don't want to discourage people because of the cost, but we want to make sure they have some skin in the game," Molgaard said. Restaurants that want outdoor dining, but no fencing, would only pay \$50 a year. The city's goal is not to recoup costs with the \$500 fee but to ensure that the restaurants make use of their outdoor dining areas, Molgaard said. The city would ensure that the fencing is uniform throughout downtown and creates a standard, signature look. Councilman Courtney Persinger said he's currently looking at different fencing and would have some options to choose from before the bill goes before the Finance Committee. It would cost about \$4,000 to \$5,000 per fence, but that does not include the cost of labor or regular maintenance. "We can cover these costs in our budget," Molgaard said. Also in the proposed bill is a requirement to widen the minimum 36-inch-wide free sidewalk area between the fence and curb to 42 inches. The Americans with Disabilities Act requires at least 36 inches for wheelchair accessibility. The proposed bill also adds language that bans smoking in outdoor dining areas, as required by the Kanawha-Charleston Health Department's clean indoor-air regulation. "This creates a very bright line prohibiting smoking in these areas," Molgaard said.

During the meeting, Deno Stanley, owner of Adelphia, and Scott Miller, owner of Bar 101/Ichiban, spoke in its favor. They both plan on keeping their outdoor dining areas for years to come. However, Miller asked why he had to pay the \$500 required administrative fee when he already invested more than \$2,000 to put his own fencing up last year. "That's \$2,000 worth of fencing that I won't be able to use," he said. Councilman Andy Richardson agreed, saying it wouldn't be fair to charge Stanley and Miller fees for 2013 since they were the city's test subjects. "If it weren't for these two men then there would be no outdoor dining in Charleston," he said. **Molgaard** also agreed and drafted an amendment to waive the \$500 administrative fee for any restaurant offering outdoor dining in 2012, which would cover both Bar 101/Ichiban and Adelphia. Stanley later asked about his liability if a customer were to be injured on the sidewalk or near the fencing. The city would only accept liability for issues that arise when it comes to installing or maintaining the fencing, **Molgaard** said. The proposed bill will be presented to council's finance committee for final approval before it's put up to a vote before city council next month.

## **Internet – Newspaper Archives Searches David Molgaard**

(Articles are in reverse chronological order)

Charleston Gazette (WV) March 14, 2012

### City-county tax snafu came with little notice After - discovery of decimal error, officials figuring amount owed

Author/Byline: Jim Balow

Charleston leaders learned they had to repay \$1.5 million in property taxes to the county just hours before members of City Council's Finance Committee voted on the 2012-13 budget Monday evening, City Manager David Molgaard said. But the total amount due back to the county may be less than originally thought because the county has been underpaying Charleston for excess levy taxes collected since July 1, 2011, said Allen Bleigh, Kanawha County chief tax deputy. Bleigh said he and an assistant spent much of Tuesday recalculating how much the city should have been paid each month from tax collections in the Charleston North tax district. The area includes North Charleston and a swath across the northern edge of the city to Wertz Avenue.

Although city Finance Director Joe Estep had alerted them about higher than expected tax payments since last fall, county tax officials were not even sure there was a problem until Monday, Bleigh said. "We had serious discussions Thursday with Mr. **Molgaard** and Mr. Estep," Bleigh said. "They were working on the budget and said they had concerns about property taxes. "I didn't think there was much to it until [Monday] morning. I saw what looked to be a typo, a formula error within the spreadsheet. "When I realized that wasn't it, that it was a more serious problem, that's when I looked into it further." Bleigh determined there was an error in the Charleston North district. "I had a second meeting ... and said yes, I can confirm there is a problem, but I can't confirm where it is." That was around 1:30 p.m. Monday.

**Molgaard** and Estep, meanwhile, had been making contingency plans with a final Finance Committee budget meeting looming Monday evening. By Friday, Estep knew there was a problem with the property taxes and projections for the 2012-13 budget, Molgaard said. Monthly property tax payments from the county had been consistently running about 25 percent higher than a year ago, which didn't make sense, Estep said.

"Joe and I got together Sunday afternoon to fully evaluate the situation and map out a plan," Molgaard said. "We also brought in Steve Duffield from the [county] assessor's office. We went back and forth on what [the problem] could be. All the numbers seemed to reconcile, and yet it seemed clear there was a problem. "I put off a revision to our budget until I met with Allen, [but] Joe and I had put a plan in place." After the afternoon meeting, he emailed the budget revision to council members.

Back in his courthouse office, Bleigh called Software Systems, the county's tax software vendor. Together they pinpointed the source of the problem - "the dreaded decimal point." A tax clerk had entered a decimal point incorrectly for calculating the city's share of property taxes from Charleston North, giving the city 10 times the proper amount, Bleigh said. He notified Molgaard

## Internet – Newspaper Archives Searches David Molgaard

(Articles are in reverse chronological order)

and Estep. "It was like 4, 4:30 [p.m.]. I went over and told them face to face." He stayed for the 5:30 finance meeting and explained the mistake to council members.

Now he's trying to figure out the right numbers. "I have to go back and recalculate all the tax distributions there have been this year, one a month - eight, from July to February," Bleigh said. "The rate was corrected yesterday. But where there was an overpayment on the Charleston current [property tax], there was an underpayment on Charleston excess [levy]. It's not going to totally compensate. I don't know if it's going to be \$10,000 or \$100,000."

Bleigh said he plans to let an accountant check the new figures before he sends them to the city for repayment. "I'm 99 percent sure they're correct." For one month alone - February - Charleston should have been paid \$2,269,907 instead of \$2,793,308, he said. That's an overpayment of \$523,401, or 23 percent.

**Molgaard** said he's not worried about repayment. "We're content in letting [Bleigh] go through the numbers and do the reconciliation. We'll have discussions at that point and on how this will be repaid. We may forgo some remittance. I have no doubt we'll work very well together. I don't expect they'll say, 'Pay us tomorrow.' "I have not sat down with our people to understand the cash flow situation," **Molgaard** said. "Our [current] budget wasn't affected by this, so it should not be a problem paying it back."

### Internet – Newspaper Archives Searches David Molgaard (Articles are in reverse chronological order)

Charleston Daily Mail (WV) January 13, 2012

## Special city tax district approved Consent will allow - Charleston to cover \$31 million Civic Center revamp \$%

Author/Byline: Paul Fallon

The West Virginia Office of Economic Development on Thursday approved Charleston's application to create a tax increment financing district in the downtown area. The approval will allow the city to finance millions of dollars worth of Civic Center renovations. "We're really pleased about this," Mayor Danny Jones said. The city wants to spend nearly \$31 million on the aging Civic Center, City Manager **David Molgaard** said. The special tax district is projected to generate enough revenue over 30 years to repay \$20 million borrowed via a bond sale, he said.

A tax increment financing district, also called a TIF district, is a specially designated area for which the property tax revenue that results from increases in assessments is diverted from the typical recipients to a specific project. Property tax revenue for this district was frozen as of July 1, 2011. All revenue from higher assessments of property in the district after that date will go toward paying off bonds for the project, **Molgaard** said. Taxes on property in the area will not increase because of the creation of the district, he said. Charleston Council members unanimously voted to apply for permission to create the district during a Dec. 19 meeting. The city sent the application to the state office on Dec. 22, **Molgaard** said. The West Virginia Economic Development Office had 60 days to approve or deny the request, he said. Jones said the speed at which it was approved is a testament to the project itself. "I think the state government wants to see the capital city have a good Civic Center as much as we want to have one," Jones said.

**Molgaard** was also pleased the application was approved. "It makes sense on many different levels for them to approve this," he said. Renovating the Civic Center has been a goal for some time, he said. "This is the first hurdle. Our efforts will now turn toward the design of the project and obtaining the additional funds needed for the project."

Bonds will be issued in two phases, **Molgaard** said. The first bond issue is anticipated to be \$7.9 million, he said. The second phase will be for about \$12 million and will come at a later date. The city will have to come up with an additional \$11 million or adjust the scope of the project, **Molgaard** said. City leaders are looking at revenue streams including lottery revenue distributed to all cities to pay off the bonds not covered by the district. Hotel/motel tax revenue also could be used to help fund the project January 13, 2012 said.

Preliminary estimates run from \$16.2 million to \$28.3 million, depending on the type of renovations. Another \$2 million in contingency funds also is needed. The TIF district is now official, and the city will start setting aside money generated from any improvements, **Molgaard** said. The city will not be able to begin issuing bonds for the project until revenue has accumulated, he said. "Obviously, we're going to have some lag time before we can start issuing

## Internet – Newspaper Archives Searches David Molgaard

(Articles are in reverse chronological order)

bonds," he said. A total of 89 parcels of land will lie in the district, according to the city's application. The rectangular district would run along Kanawha Boulevard from Capitol Street to the Elk River; along the Elk to Washington Street East; east on Washington to Court Street; south on Court to Virginia Street; and east on Virginia to Capitol Street.

**Molgaard** said city leaders wanted to incorporate only properties that would directly benefit from Civic Center renovations, such as hotels and restaurants. "It's limited to the area that we might think of as our visitors and convention district," **Molgaard** said. City leaders expect a lot of action in this district in the coming years, **Molgaard** said. There are improvements planned for several buildings, and construction of a new hotel is slated for one of the parcels inside the district.

Improvements to the Chase Tower, the downtown Marriott, the Ramada Inn Charleston on Kanawha Boulevard and the Charleston Town Center mall will help fund the renovations. A Marriott Courtyard Hotel, an office building and a parking garage are to be constructed at the confluence of the Elk and Kanawha rivers.

# Internet – Newspaper Archives Searches David Molgaard (Articles are in reverse chronological order)

Charleston Daily Mail (WV) August 23, 2011

## FIRE DEPARTMENT Holiday pay plan snuffed Retiring - Charleston firefighters were paid \$%in advance for holidays that - hadn't yet occurred \$%

Author/Byline: Paul Fallon

To save money and reduce the city's pension liability, Charleston officials have ended the practice of paying retiring firefighters for holidays they have not yet worked.

Last January, City Manager **David Molgaard** discovered something that seemed amiss about the lump-sum payments that in previous years had been made to firefighters upon retirement. The final checks had included pay for holidays for the remainder of the calendar year in which they were retiring even though they had not yet worked those days. "Apparently this has been going on for years," he said.

Like all other city employees, firefighters are deemed to have earned vacation time for the full year on Jan. 1. If they leave before the year is out, they are paid for that time. All firefighters receive extra compensation for working holidays - 108 hours in a non-election year and 132 in election years. This is because fire stations must be manned 24 hours a day, 365 days a year, including holidays. Firefighters, like other public employees, get 12 holidays in a non-election year. They also get holidays for election days, which are determined by what days the elections fall on, Finance Director Joe Estep said. Firefighters must schedule their vacation time, along with the days they are taking off for holidays, at the beginning of the year, **Molgaard** said.

In previous years, those who waited until the beginning of the year to retire - and many apparently have - would turn in not only their unused vacation time, but also the upcoming holiday hours, for a lump sum payment. The city would have had to pay a total of \$12,489 to the five firefighters for the unused holiday compensation time, City Finance Director Joe Estep said. "We just finished Christmas 2010, and we were two weeks into January, and they were wanting us to pay them for Christmas 2011," **Molgaard** said. "These certainly weren't earned holidays because the holidays hadn't occurred yet." The pay for holidays not worked not only increased the size of the lump-sum payment, but also boosted firefighters' pension payments during a time when the city is struggling with millions of dollars of unfunded liability in the police and fire pension plans, he said.

One of the factors in the formula used to calculate pensions is firefighters' total pay, not just their base salaries. **Molgaard** said payment for unworked holidays for the lowest paid firefighters retiring at the beginning of 2011 would have increased their pension payments by \$40 or \$50 a month. "That equals a pretty significant amount of money for the city to pay over time," he said.

Mayor Danny Jones said the payments never should have been allowed. "You should only get paid for holiday leave for days that you actually work," he said. City officials noticed the practice at the beginning of 2011 when five retiring firefighters turned in their paperwork

## Internet – Newspaper Archives Searches David Molgaard

(Articles are in reverse chronological order)

claiming the upcoming holidays for payment. One of the five was Timothy McKown, 50, of Jackson County, a paramedic/firefighter for Charleston for 21 years. McKown believes the retiring firefighters were wronged when they were denied payment for the upcoming holidays. He filled out his retirement paperwork claiming payment for vacation time and holiday time and submitted it to city hall before his final shift on Jan. 2. Two weeks later, he discovered he would be paid for the unused vacation time but not the upcoming holidays. McKown said he was upset because firefighters who had retired in past years were compensated for both. "I was upset because the city decided to deny it two weeks after I retired," he said.

Fire Chief Chuck Overstreet said he sees both sides. He understands the city is struggling to keep up with pension payments and the over \$99.1 million unfunded liability in the firefighter pension plan. But he also understands the firefighters' frustration because those who retired in the past had been paid for the upcoming holidays. Overstreet said the city could have told firefighters that payments for upcoming holidays would cease after the 2011 group had retired. "I just question the timing of it," he said. The mayor's response was to say, "It never should have been paid for all those years. It's completely inappropriate and they're not entitled to it."

Overstreet said the city's decision has caused some animosity. "Some of the guys had a frictional type of relationship with the city," Overstreet said. "They took it personally." The issue went before the Charleston Civil Service Board last spring, and the firefighters' grievance was thrown out. McKown said he would not be pursuing the issue any further.

However, City Attorney Paul Ellis said his office was contacted by local attorney Marvin Masters on behalf of the retirees a couple of months ago. Ellis said the recently retired firefighters have taken no legal action so far. A secretary for Masters conferred with the attorney and said he was not involved in the case.

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## **Section 7**

## Internet – Newspaper Archives Searches David Molgaard (Articles are in reverse chronological order

(Articles are in reverse chronological order)

Charleston Gazette (WV) July 20, 2011

#### Charleston receives \$50,000 NEA grant

Author: Unknown

The City of Charleston announced on July 12 it will receive an Our Town grant from the National Endowment for the Arts, one of only 51 grants awarded nationwide. Charleston will obtain \$50,000 to create public art policies, guidelines and promotional programs. Our Town is the NEA's latest investment in "creative placemaking," through which partners from both public and private sectors come together to strategically shape the social, physical and economic character of a neighborhood, town, city or region around arts and cultural activities.

The Charleston Public Art Project will entail four key outcomes including development of policies and guidelines for public art, a complete inventory of current public art including any short-term and long-term maintenance needs, outreach and promotions to market public art and establishing a local government arts development initiative to oversee implementation of policies and guidelines, future public art projects and encourage new public art installations. "Communities across our country are using smart design and leveraging the arts to enhance quality of life and promote their distinctive identities," said NEA Chairman Rocco Landeman. "In this time of great economic upheaval, Our Town provides communities an opportunity to reignite their economies."

"Over the past decade, Charleston has taken several important steps to create a more vibrant community for the arts and culture with the creation of FestivALL, monthly Art Walks, opening of the Clay Center, investments in several public art projects and greater promotion of art and artists in our city," said Charleston Mayor Danny Jones. "This grant — and the \$100,000 partnership it creates — will help us get a deeper understanding of our current inventory of art and chart a course to build on our recent successes." The competitive grant application process was led by City Manager **David Molgaard**, City Purchasing Manager Shannon Milroy and Susie Salisbury, vice president of community development for the Charleston Area Alliance. Matching funds and in-kind resources have been provided by Charleston Urban Renewal Authority, City of Charleston, Charleston Area Alliance and Clay Center for the Arts and Sciences West Virginia.

"Art is an essential element in creating a thriving community and can play a significant role in economic development," said Alliance President/CEO Matt Ballard. "We congratulate all who contributed to securing this major grant, which will advance the city's strong commitment to the arts and strengthen it as an attractive and inviting place in which to live, work and play. It's a win-win for the arts community, citizens and business alike."

"Public art not only makes a statement about the community, it enriches the lives of those within it. This grant from NEA will provide needed funds to promote our public art to our community and visitors. It will also serve as a catalyst to protect these wonderful community assets and to

c.

## **Section 7**

## Internet – Newspaper Archives Searches David Molgaard

(Articles are in reverse chronological order)

encourage installation of others," said Judy Wellington, president and CEO, Clay Center for the Arts and Sciences West Virginia.

"Everyone who has contributed or hopes to contribute to public art in Charleston is excited about this National Endowment for the Arts grant which will help to preserve and publicize our public art works. FestivALL joins many other organizations in thanking the NEA and congratulating Susie Salisbury and the Charleston Area Alliance for obtaining it," said Larry Groce, executive director of FestivALL Charleston.

"As the capital city of West Virginia, it is our responsibility to showcase and preserve the cultural hub of the state by establishing public art guidelines and sustainable maintenance plans. By setting this example, perhaps we can inspire other cities and communities to develop their own guidelines," added Naomi Bays, chair of the Arts Council of Kanawha Valley.

The National Endowment for the Arts was established by Congress in 1965 as an independent agency of the federal government. To date, the NEA has awarded more than \$4 billion to support artistic excellence, creativity and innovation for the benefit of individuals and communities. The NEA extends its work through partnerships with state arts agencies, local leaders, other federal agencies, and the philanthropic sector.

## Internet – Newspaper Archives Searches David Molgaard

(Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **David D. Molgaard** is listed below.]

Charleston Daily Mail (WV) July 5, 2011

New Council to tackle pension funding Elected members - agree solving pension problem is biggest challenge city faces \$%

Author/Byline: Paul Fallon

Just a few weeks ago, eight new members were sworn into their seats on Charleston's City Council. Already they agree that figuring out how to fund firefighter and police pension plans is the biggest challenge facing the city they've been elected to serve.

Because Charleston has millions of dollars in unfunded liability for both plans, officials recently opted to close the old plans to new hires, offering them a new plan instead. But to move forward with that new pension plan, the city must come up with \$1.7 million on top of the \$6.2 million it already allocated.

One new member, Republican Courtney Persinger, who represents the city's 15th Ward in the South Hills community, thinks Mayor Danny Jones and City Manager **David Molgaard** have done a good job addressing the situation. "But this is a big chunk of money the city has to come up with," he said.

## Internet – Newspaper Archives Searches David Molgaard

(Articles are in reverse chronological order)

Charleston Gazette (WV) June 7, 2011

#### POLICE, FIRE City predicts \$21M pension cost by 2031

Author/Byline: Jim Balow

Yearly pension costs for city police and firefighters could reach \$21 million by 2031, Charleston City Manager **David Molgaard** said Monday. Unfortunately, that's the good news. If the city hadn't adopted a new "conservation methodology" for newly hired police and firefighters earlier this year, those pension costs would have risen to more than \$30 million a year under the old "alternative plan," **Molgaard** told members of City Council's Finance Committee.

**Molgaard** unveiled new 20-year projections of city finances Monday, and gave newly elected council members a crash course in the complicated problems the city faces in trying to pay off the under-funded pension plans for its uniformed employees. Finance Director Joe Estep estimated trends in property taxes and revenues for the next 20 years, **Molgaard** said. "We see anticipated revenues in 2021 of \$104 million and in 2031, \$142 million." The current budget is just over \$80 million.

This year, salaries, pensions and other costs for the police and fire departments make up more than 43 percent of the total city budget, he said. But in 20 years, because of the rising pension costs, those two departments will represent almost 53 percent of the total budget. "Growth in the fire department will consume what we spend on parks and recreation," **Molgaard** said. "I'm not saying we'll do that, but we'll have to do something." A consultant's study of fire department efficiencies should be ready in two weeks, he said.

But according to preliminary results, "we might be spending twice as much as any comparably-sized city east of the Mississippi River per capita" on fire protection, **Molgaard** said. "It looks like we may have the ability to look for ways to save money. Somehow other communities are finding other ways of dealing with the challenge."

Councilman Harry Deitzler said each retiree gets more than \$40,000 a year through his or her pension. "If they live 20 years, that's \$1 million. Every man on the truck, that's a million-dollar liability."

Mayor Danny Jones said fixing the pensions will be council's challenge for the next four years. "It's tough. There will be voices out there. They don't want to change. So what's your plan? Anyone can say they don't like something."

## Internet – Newspaper Archives Searches David Molgaard

(Articles are in reverse chronological order)

Charleston Daily Mail (WV) March 18, 2011

Charleston City Council passes \$81.95 million budget - Jones says he is happy legislation provides another way to cover - unfunded liabilities

Author/Byline: Paul Fallon

Charleston City Council passed an \$81.95 million budget by a unanimous vote during a short special meeting Thursday. The upcoming fiscal year's budget represented many challenges and was one of the hardest he has undertaken, said Mayor Danny Jones. "I'm proud we balanced our budget."

Jones also said he was very happy that a bill giving cities an alternate way to fund firefighter and police pensions passed the Legislature during the recent session. This passage opens the door for the city to hire three new police officers to fill vacancies, he said. "It's a process to hire new officers," Jones said. "But hopefully we'll be able to do this in a month." The three new officers would bring the force to 176. A temporary freeze on the hiring of new officers was put in place by Jones last March due to the massive unfunded liability in the city's police and firefighter pension funds. Jones said the bill eventually would allow the city to cover about \$200 million in pension liabilities. "But it's going to be a long, slow, expensive road," he said. "But it will save the city from bankruptcy."

The city will not begin hiring new firefighters until a study of fire station deployment is completed, City Manager **Dave Molgaard** said. "We're waiting until we get that study back before we talk about hiring any new firefighters," he said. One of the issues to be studied is what to do with the outdated Oakwood Road fire station. It has structural problems, **Molgaard** said. One solution would be to consolidate the Oakwood station with the Bridge Road fire station, he said. The report should be returned to city council around the end of April, he said.

For a second consecutive year, the upcoming fiscal year budget does not include any across-the-board raises for city employees. The budget grew by about \$1.5 million over the current fiscal year. It includes a \$100,000 cut in funding to the Kanawha-Charleston Health Department, bringing the city's total contribution to \$100,000. The city expects an increase of about \$180,000 in property tax revenue next year. Business and occupation tax revenue is expected to rise by about \$792,000.

The increased revenue will cover rising costs, such as retirement benefits, Molgaard said.

# Internet – Newspaper Archives Searches David Molgaard (Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **David D. Molgaard** is listed below.]

Charleston Daily Mail (WV) January 19, 2011

## Majority of landlords owe city money Payments on - either fire, refuse or taxes on at least 2,300 units are late \$%

Author/Byline: Billy Wolfe

City leaders also received a report at Tuesday's meeting on the annual audit conducted by the state Auditor's office. The city was given a mostly clean report, with just two exceptions, said Audit Manager John Jones. The city was out of compliance last fiscal year regarding its policies on clothing allowances for public safety workers and allowing Clay Center officials to "make checks payable to cash" in order to pay event promoters, Jones said.

Public safety employees were not being told to show receipts for clothing allowances. They also were not being required to list the clothing as "taxable income" on their annual W-2 statements, Jones said. City Manager **David Molgaard** said that the problem has been corrected. Employees will now be required to list uniforms as taxable income with the IRS, he said.

Discrepancies with check payments at the Clay Center also have been resolved, Jones said.

Jones and other officials with the auditor's office who attended the meeting declined further comment to news media after their presentation.

## **Internet – Newspaper Archives Searches David Molgaard**

(Articles are in reverse chronological order)

Charleston Gazette (WV) November 16, 2010

#### City health-care situation better, manager reports - Retirement liability costs a 'monster' to be 'mastered'

Author/Byline: Jim Balow

At a time when almost everyone is paying more for health care, Charleston's health-care costs have gone down, City Manager **David Molgaard** said Monday. As a result, the city could meet some of its unfunded retiree health obligations that seemed out of reach a year ago, Molgaard told City Council members.

"It may be this OPEB [other post-employment benefits] monster can be mastered," Molgaard said. "I think we can fully fund our liability for the last two years. We're getting there." City officials cited the OPEB liability - \$130 million in unfunded future health-care costs for current and future retirees - last spring as one of the main reasons they couldn't give employees an across-the-board pay raise as usual this year.

The city budgeted about \$4.5 million last year for current health-care costs. But under new accounting rules, it was supposed to set aside another \$5.2 million for future OPEB costs. "We presented new data to our actuaries, and they recalculated," Molgaard said. The obligation was much less - about \$2 million this year, \$3 million next year, he said. At the same time, through a series of wellness measures, the city has been able to slow the normal inflation in costs, he said. Instead of the 11 percent increase predicted each year by a consultant, the city's health costs rose just 4 percent in 2009. So far this year, the costs are down 10 percent, **Molgaard** said.

Those savings were reflected in a series of budget revisions council members approved Monday to close out the books on the 2009-10 city budget. "This is the year-end stuff we do about this time each year," Molgaard said.

Council transferred \$2 million in budgeted but unspent health-care funds, and another \$2.34 million of other unspent money from the general budget, into the city's health-care reserve - a total of \$4.34 million. Another \$200,000 was set aside to help a draft a new comprehensive plan for the city's Planning Department. The current plan is about 15 years old.

### Internet – Newspaper Archives Searches David Molgaard (Articles are in reverse chronological order)

Charleston Daily Mail (WV) September 9, 2010

City wins design grant EPA award pays for - consultants to give Slack Plaza a makeover Author/Byline: Rivard

The U.S. Environmental Protection Agency will pay for a team of consultants to redesign Slack Plaza, the city of Charleston's maligned transit mall. The EPA announced Charleston as one of five state capitals that are meant to benefit from the agency's "Greening America's Capitals" program. The federal agency will pay for a team to come up with a plan for the plaza. It will not provide the city with money to turn blueprints into reality, something that could end up costing hundreds of thousands of dollars.

In announcing Slack Plaza as its choice, the EPA said, "The city itself acknowledges that the area lacks any green space, has no real sense of place and is challenged by poor signage and safety issues." The other sites are in Boston; Jefferson City, Mo.; Hartford, Conn..; and Little Rock, Ark. Thirty-eight of the 50 states applied.

Slack Plaza is the site of a bus station that serves thousands of riders a month and is the main crossroads for downtown foot traffic. But it's also "barren, hot and unattractive," according to an application submitted to the EPA by Charleston City Manager **David Molgaard** and Susie Salisbury, the vice president of the Charleston Area Alliance. They said the transit mall is a stop for more than 640 bus trips a day but the riders, many of them low-income and without a car, have said they don't like the plaza because of its design, poor security and blight. "In addition, a lack of green space has resulted in an area this is barren, hot and unattractive. Citizens and visitors have expressed concern with the targeted area, and the statistics show that in the past two years, over 1,000 calls to Metro Emergency 911 have been logged in the immediate area we are proposing to redesign," the application said.

The EPA said one goal in Charleston is to "establish a common vision for Slack Plaza that could transform it into a multi-modal transportation hub and well-used town square. Adding public art, trees, and redesigning the pedestrian corridors to serve a range of users will continue Charleston's efforts to foster a more beautiful and sustainable community." The agency's help doesn't come with any money outside the fees to be paid to the consultants, who have yet to be hired. Design consultants can be costly.

**Molgaard** said in an interview Wednesday that the master plan for the city's riverfront cost \$120,000. Once the city has the design provided by the EPA-hired consultants, it would have to find the money to do the work. That could cost \$1 million or more, **Molgaard** said. The city would likely seek grant money and donations.

**Molgaard** suggest problems at the plaza have been endemic since it was constructed more than 20 years ago. He said the original design was "somewhat deficient." "Certainly it's tired looking after the last 20 or 25 years," he said. "But even the design itself constituted a gauntlet that

# Internet – Newspaper Archives Searches David Molgaard (Articles are in reverse chronological order)

required people who were using it as a throughway to pass other users who were sitting and whiling away the time but would oftentimes cause problems for those who wanted to get from one end of the walkway to the other."

Some of the nicer touches in the original design are useless today. Some of the trees that were planted were cut down when they matured and became a safety hazard. A fountain in the plaza's center would get clogged with trash and people would bathe in it. It's been turned off. There have been several attempts to fix the plaza's problems, though they have been occasionally been beset by controversy. A few years ago, for instance, the city installed "loafer rails" - otherwise known as spikes - on low walls where people had been sitting. The goals was to prevent loitering.

Last year, **Molgaard** said he applied for an \$800,000 grant to pay for a redesign that was drawn up in-house, but the city didn't get the grant. He said having the comprehensive plan drawn up with the EPA's help could help the city attract money.

City officials will meet with the EPA to talk about the project in coming weeks. After that, there will be some type of bidding process to hire the consultants, he said. That process may favor bringing in out-of-state consultants. "I don't think there's an intention to favor local versus outsiders, but the goal is to hire people who have significant experience with urban design and the goals of providing sustainable, green, innovative benefits," **Molgaard** said.

#### Internet – Newspaper Archives Searches David Molgaard (Articles are in reverse chronological order)

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Charleston Daily Mail (WV) March 5, 2010

#### Committee submits city budget tight on new spending

Author/Byline: Billy Wolfe

Charleston's proposed budget for the upcoming fiscal year contains just \$123,000 in new spending. City Finance Director Joe Estep told members of the city's finance committee Thursday that this is one of the smallest growths in spending he's seen. From 1999 to 2008, the city saw a 25 percent increase in spending. The budget increased by about 5.8 percent last year alone.

The \$80.4 million budget presented to committee members contains no raises for city employees for the first time since Mayor Danny Jones took office in 2003. Last year, an across-the-board 3 percent pay increase cost the city about \$1.1 million, city manager **Dave Molgaard** said. Officials plan to eliminate one cashier position in the city collector's office, thanks to what **Molgaard** called "increased efficiency." Four lieutenant positions in the fire department also will be converted to lower paid firefighter positions, **Molgaard** said. He expects those cutbacks, as well as other position changes, to save the city more than \$40,000 next year. He said no employees are being laid off, but that the cutbacks will be implemented as employees leave their jobs.

Jones also has proposed consolidating the fire stations on Oakwood and Bridge roads. The consolidation is not yet reflected in the proposed budget, **Molgaard** said. "My understanding is that the mayor intends to form a committee to study the best location for the new station," **Molgaard** said. "It's still too early to budget for that."

Another big cut to spending came Wednesday morning, when the state Consolidated Public Retirement Board reconsidered an earlier decision to increase public sector employer pension contributions by 6 percent of an agency's total payroll. That decision would have increased the city's contribution by more than \$950,000, officials estimated. The board reconsidered that decision, following an outcry from elected officials across the state. The board voted Wednesday to set the increase at 1.5 percent, meaning Charleston will instead contribute about \$239,000 more to pensions — a savings of about \$717,000.

Jones also wants to put a temporary hiring freeze on the police and fire departments, and wants the savings from those cutbacks set aside in a pension stabilization fund. The city is currently underfunding police and firefighter pensions by about \$129 million, and that figure is expected to climb to \$185 million over the next 20 years.

The only budgeted increase to city staff will be three property maintenance inspectors, two of which will be brought on board to enforce the yet-to-be-passed controversial landlord ordinance. Vehicles and laptop computers will be purchased for the new inspectors as well, **Molgaard** said. The combined estimated cost for the new inspectors' salaries and the new equipment will be

#### Internet – Newspaper Archives Searches David Molgaard (Articles are in reverse chronological order)

about \$214,000. An additional \$20,000 has been budgeted for property demolitions in the city, **Molgaard** told finance committee members.

In addition, Estep said he budgeted for a 4 percent increase to employee health care costs, but said the city is poised to come in \$1.8 million under budget for the current year. **Molgaard** said he is working to implement significant changes in employee health care plans. Right now, employee premiums are tied to income, and **Molgaard** said that system creates some unfairness. Under the current plan, an employee who makes less than \$30,000 a year can insure a whole family for less than a single employee who makes \$40,000 a year, **Molgaard** has said. "In essence, our single employees are subsidizing our employees who have children," he said. His ultimate goal is to formulate a plan where the city would subsidize about 60 percent of all city workers' health plans. Non-tobacco users would receive an additional 15 percent discount under that plan, he said. **Molgaard** also is working to change the city's policies so that unused sick leave can no longer be converted to premium health care coverage, he said.

Surprisingly, officials say they expect revenues to climb by about \$2.2 million in the upcoming fiscal year. Estep has budgeted for a \$2.2 million increase in revenues, and he said the vast majority of the new money will come in the form of property taxes. Estep said he budgeted for about \$9.1 million in property tax collections for the current fiscal year, but that collections have already topped \$9.9 million.

The city also has paid off the debt incurred on its 1989 general obligation bond. Estep said that means an additional \$1.4 million that was normally used to pay off the debt will now go into the city's general fund.

The city also has budgeted for about \$500,000 less in business and occupation tax collections, but Estep said that figure might be too extreme. He said the tax collections have been showing improvement in the last six months.

The whole of council will hold a special meeting at 6 p.m. March 18 to vote on the budget.

# Internet – Newspaper Archives Searches David Molgaard (Articles are in reverse chronological order)

Charleston Daily Mail (WV) June 29, 2009

## City still allows employees to trade sick days Charleston has an unfunded health insurance liability of \$129.7 million

Author/Byline: Cara Bailey

Eight years after state government stopped the practice for new hires, the city of Charleston continues to let employees trade unused sick days for health insurance premiums in retirement. And despite the fact that the city, like the state, has a hefty unfunded liability for health insurance promised to its retirees, City Manager **David Molgaard** says the city comes out ahead by using the incentive. "The city has not cut off conversion of sick days like the state has because the analysis of relative benefits versus costs suggest that the city continues to benefit from this arrangement," he said. A recent actuarial study shows the city has an unfunded liability of \$129.7 million for health insurance promised to its retirees.

Like the state, the city highly subsidizes health insurance for all its retirees, not just those who trade in sick days. City employees with unused sick days, like state employees, also can opt to trade those days for service credit when they retire and, thus, inflate their pensions. Many public employees find they are ahead to trade their unused sick leave for higher pensions because the pension increase exceeds the cost of the health insurance premiums. State officials decided in 2001 not to let employees hired after that point trade in sick days for health insurance premiums in retirement.

In a study commissioned by former Gov. Bob Wise, nearly 67,000 people covered by the public retirement programs had built up 7.4 million sick days. If all those employees were to trade sick leave for insurance premiums upon retirement, it would cost the state between \$919 million and \$1.5 billion, the study said. The state eliminated the option for employees hired after July 1, 2001. The Governmental Accounting Standards Board now requires political subdivisions to reflect the amount of retirement liabilities in their financial reports. Both state and local governments are struggling to meet the new reporting requirements, which are forcing controversial decisions and even benefit cuts. However, **Molgaard** says the city comes out ahead by using the incentive to cut down on active employees' use of sick leave. Of the 374 retirees currently enrolled in the city's health care plan, only 62 are not paying premiums after trading in sick days, said Finance Director Joe Estep.

The city's cost for each employee varies according to when they were hired and whether they have dependents who need coverage. However, **Molgaard** said calculations of the value of sick days for those 62 employees added up to more than \$1.9 million while the total cost of their health insurance premiums was \$862,000. In his view, that gave the city a savings of \$1,038,000. "When we looked at those numbers in and of themselves, the city is coming out ahead in terms of value of services versus value of premiums," **Molgaard** said.

## **Internet – Newspaper Archives Searches David Molgaard**

(Articles are in reverse chronological order)

The city grants 12 sick days a year to civilian employees. Firefighters and police officers receive a certain number of hours of sick leave each month based on the hours they worked. The unused sick days do not expire when the year ends, so employees who miss little work can build up significant numbers of days over time. Those who opt to trade their unused sick time for health insurance premiums can receive one month of coverage for every two days if they are single and one month for every three days if they need family coverage.

**Molgaard** said Charleston has maintained the sick-day conversion policy to encourage people not to take off unless they are actually ill. The ability to convert sick days after retirement is a bonus for the employees, and the city cuts down on the loss of productive work time. "The fact of the matter is - and maybe it's human nature - there are some people who feel sick days are an entitlement, and as soon as they get one, seem to take it," Molgaard said. "We encourage people to save their sick days so they don't take off, so the city doesn't lose that value."

Molgaard said the value of premiums being obtained through sick-day conversion is less than 6 percent of the cost of the city's yearly premiums. "We're not really giving up a lot in terms of dollars on a yearly basis as it relates to health care costs," he said.

Lisa Dooley, the executive director of the West Virginia Municipal League, said Charleston is not the only city that has declined to follow the state's lead on this issue. In an informal survey she conducted via e-mail recently, she found no other cities in the state that had made the change. However, she expects the issue to come up at the Municipal League conference in August. "We know that the day of reckoning is coming, even though the state is saying cities can book entries," Dooley said. "Once the state has to reckon with this liability, they'll pass the burden to the political subdivisions."

**Molgaard** said he does hope to address the issue when city officials look at the personnel code, which could receive some revamping. Molgaard said his goal is to have the overall health care plan, including liabilities, addressed before Jan. 1.

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## **Section 7**

# Internet – Newspaper Archives Searches David Molgaard (Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **David D. Molgaard** is listed below.]

Charleston Gazette (WV) May 9, 2009

**Smiles and scowls** Author/Byline: Gzedit

To City Manager **David Molgaard** and other Charleston officials who streamlined City Hall bureaucracy and saved \$372,000 in salaries without laying off any employees.

## **Internet – Newspaper Archives Searches David Molgaard**

(Articles are in reverse chronological order)

Charleston Gazette (WV) March 20, 2009

#### \$80M budget breezes through council

Author/Byline: Jim Balow

In a meeting in which the business at hand lasted barely longer than the invocation, City Council members approved Charleston's \$80.3 million budget for the fiscal year that starts July 1.

Unlike past years, there was no debate, no issue, no controversy over this year's budget-making process, which began about a month ago. No questions about how to give pay raises (everyone except elected officials gets 3 percent more), no hand-wringing about whether to cut funding for the health department.

That may reflect the rather bland nature of the 2009-10 budget, which looks a lot like the current one except for necessary increases in pension payments, health-care costs and prices of supplies such as gasoline and road salt. And it may reflect the relative health of the city economy, which continues to bring in more and more revenue despite the national recession.

City Manager David Molgaard and Finance Director Joe Estep predict business and occupation tax revenues will rise by \$3.65 million over their estimate at this time last year - which accounts for most of the \$4.47 million increase in the overall budget. They attribute that to the recessionresistant fact that the city is full of doctors, lawyers and accountants. The service segment of the B&O tax brings in more than twice as much money as retail sales, Estep says.

Property tax estimates are also up \$744,000 over last year. Part of that includes a tiny increase in the levy rate. A typical homeowner with a \$100,000 house will pay \$1.68 more in real estate property taxes next year, Molgaard has said.

Council members will set the new levy rates during a special meeting at 5:30 p.m. April 21. That meeting, like the one Thursday, is expected to be a brief affair.

## **Internet – Newspaper Archives Searches David Molgaard**

(Articles are in reverse chronological order)

Charleston Gazette (WV) July 22, 2008

#### City Council settles suit by former collector

Author/Byline: Jim Balow

Charleston City Council members agreed Monday to settle a 2003 lawsuit filed by former City Collector Jim Jones, who alleged that former Mayor Jay Goldman wrongfully fired him in 2001.

Under the settlement, Jones will receive \$50,000 and give up all claims against the city, City Manager told members of the council's Finance Committee earlier Monday evening.

Although Jones was a department head, an at-will employee who could be let go at any time, he alleged in his lawsuit that Goldman fired him because of his attempts to collect back taxes from City National Bank, Molgaard said. Goldman was a member of the bank's board of directors. "As you'll recall, the city received a sizable settlement from the bank," Molgaard said. "We vigorously defended this. There was a trial in Judge Walker's court. It was a hung jury."

City officials weighed the potential costs of a second trial and decided it made more sense to settle the case, **Molgaard** said. "We were going to spend \$50,000, one way or another. This brings closure. We are not admitting liability. I don't feel it's a win for the plaintiff."

## **Internet – Newspaper Archives Searches David Molgaard**

(Articles are in reverse chronological order)

Charleston Daily Mail (WV) April 2, 2008

#### Agency's \$1.4 million reserve at issue Mayor Jones says health department's fund is much too large

Author/Byline: Matthew Thompson

Charleston Mayor Danny Jones is questioning a \$1.4 million reserve account that the Kanawha-Charleston Health Department maintains. Jones says that's much too large for a reserve fund and contradicts the health department's contention that a reduction in funding contemplated by the city would cause people to suffer. "Their stance that people will suffer without our money is a falsehood," Jones said.

The state Division of Health requires that local health departments keep a cash reserve "equal to at least the past three months' operating expenditures." Lolita Kirk, the health department's director of administrative services, said the agency's annual budget is \$3.2 million. According to state guidelines, the reserve fund should contain at least \$800,000. However, Kirk said, ""We usually go into each year with \$1.5 million." "We have that when we start the year over again. We try to stay between \$1.2 and \$1.5 million. "That is actually our cash. That's our money. It's the total sum of what we have on hand." She said the department tries not to dip into the fund. "That's too big for a rainy day fund," Jones said. "That'd be comparable to us having an \$18 million fund." The city budget for the fiscal year beginning on July 1 is \$75.8 million.

According to the city's analysis of health department financial information, the reserve fund has increased by \$100,000 each year since 2004. The analysis also shows that the health department has no debts and has net assets of more than \$2.4 million. The city has contributed \$200,000 annually to the health department in recent years. But last month, at Jones' urging, council voted to cut the allocation in half. The cut was in response to what Jones and others have contended was a lack of cooperation from the health department in a plan that would have had the agency moving to a new location. That would have enabled developers to build a hotel on prime property close to the Civic Center now occupied by the agency. Backers of the plan noted that new jobs and tax revenue would have resulted.

The proposal was scrapped Monday after Angela and Kelsey Harding, who wanted to build the hotel, announced they no longer wanted to go forward. The couple said they had run out of patience because it was taking the health department too long to find new quarters. The Hardings own and operate Harding's Restaurant in Mink Shoals and Sleep Inns in Mink Shoals and Cross Lanes. Jones said it's possible that council could reconsider the reduction in funding for the health department now that plans for the hotel have been scrapped. But the size of the reserve fund suggests the department would be able to easily withstand the cut, he added.

City Manager David Molgaard said the administration has decided to require regular oral reports on financial conditions from representatives of agencies that receive city funding. The reports would be presented to council's Finance Committee, Molgaard said. He said he's not

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## **Section 7**

# Internet – Newspaper Archives Searches David Molgaard

(Articles are in reverse chronological order)

sure how often the agencies would have to give their reports. "We want to see them from all the entities we give contributions to," **Molgaard** said. "We want them to occur on a semi-regular basis."

Meanwhile, Kanawha County Commission President Kent Carper said talks are still ongoing for a possible relocation of the health department. The county owns the health department property. Carper said he has spoken with Charleston Area Medical Center to help find the department a new home. By finding the health department a new home first, Carper said more developers could show interest in the Lee Street property. "That could happen," Carper said. "We need to clear out the atmospherics first."

## **Internet – Newspaper Archives Searches David Molgaard**

(Articles are in reverse chronological order)

Charleston Daily Mail (WV) March 25, 2008

#### Budget takes big jump in decade Rising costs of utilities, gasoline are cited as part of the reason for hike in Charleston spending

Author/Byline: Matthew Thompson

Charleston's budget has jumped by more than \$25 million over the past decade. When the city approved its budget for the 1999-2000 fiscal cycle, the total budget was \$50.4 million. Last week, the City Council approved a \$75.8 million budget for the next fiscal year, which begins July 1. The figure is up from the \$69.8 million budget that was approved the previous year. City Manager David Molgaard said many increases are the result of the rising costs of utilities and gasoline. "It's just a sign of the times," Molgaard said. "We had to increase utility costs just like everyone else did."

Contractual items in the budget, which include utilities and professional services, went from \$9 million to \$10 million. Commodity items, which includes gas, oil, and road salt, went from \$3.3 million to \$3.6 million. "We have police officers on duty 24/7, we have fire, garbage, salt trucks and refuse. We have a fleet running that delivers essential services," Molgaard said. Fee revenue will go up significantly next fiscal year.

Last year, the city budgeted \$10 million in total fee revenue. This year, the city has budgeted \$14 million. The figure jumped after the City Council upped the \$1 user fee to \$2 last fall. The user fee, paid by anyone who works in the city, is used to pay for police officers added to the force a couple of years ago and for street paving. "We haven't increased anything else in the general budget," Molgaard said. "We have not changed any rates." But the Charleston Sanitary Board plans to raise sewer rates by 42 percent next fiscal year. But Molgaard said the sanitary board is a separate entity and not included in the city's budget.

Joe Estep, the city's finance director, said many factors have increased the budget since he began with the city in 2006. During his tenure, the total budget has gone up \$12.5 million. It's a total increase of 19.8 percent. He said more than half of that cost, \$7.3 million, is for employee costs such as wages and salaries, retirement and health care. Estep said the growth is made up of \$4.1 million in increased wages and salaries, \$1 million in police and fire pension costs and \$1.8 million in healthcare increases.

In the next fiscal year, the city is planning to open a new health clinic for city employees The clinic will offer city employees free primary health care services. It will serve about 1,144 employees and retirees currently on the city's health plan. The clinic will be on the second floor of the Appalachian Power Park office building at 601 Morris St. City officials hope employees will take advantage of the new clinic, helping curb costs of doctor's visits and decreasing the amount of time workers miss for doctor's appointments and illness. "The clinic will cost a little bit in the first year or two," Molgaard said. "But based on what we have seen from similar programs, it will be a big payoff for us down the line." Molgaard said the next fiscal year's

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## **Section 7**

## **Internet – Newspaper Archives Searches David Molgaard**

(Articles are in reverse chronological order)

budget was easier to prepare as compared to past budgets. He said the city used to rely on timeconsuming paper spreadsheets. Now the city uses computer models that offer more precise estimates, he said. "It's easier this year because we have learned lessons from the past," Molgaard said. "We keep getting more efficient and further ahead of the game every year."

## **Internet – Newspaper Archives Searches David Molgaard**

(Articles are in reverse chronological order)

Charleston Daily Mail (WV) January 7, 2008

#### \$1 increase in city s user fee goes into effect

Author/Byline: Matthew Thompson

The increase in Charleston's user fee has officially kicked in. Anybody who works in the city will have \$2 taken out of his or her paycheck this week, up from \$1. In November, an overwhelming majority of city council members voted to double the fee, which first took effect in 2004. The increase took effect Sunday night. City officials say the added revenue will help offset projected budget deficits.

The \$1-a-week fee was raising about \$3 million a year, mostly for street maintenance and police services. Those costs make up about 34 percent of the city's annual budget. But the fee was adding up to only about 24 percent, city manager David Molgaard said. "With the costs of living and health care and other benefits, it's clear it's going to be increasingly challenging to maintain the force we have now, without some additional revenue to help us," he said.

"If we look out over the next four to five years, it's clear based upon projections that we're going to be facing budget deficits," Molgaard said. "We want to keep our current services at the current level without any revenue loss." A five-year budget projection, prepared by the city manager's office, shows expenses climbing to \$83 million a year by 2012, with the city taking in only \$73 million in revenue. The annual budget now is about \$69 million.

Molgaard has said by 2009 the city could begin facing budget deficits — even with the user fee increase. The user fee has been a controversial issue since it was originally adopted in 2004. The fee was challenged in court, and the state Supreme Court ordered the city to put the issue before voters. In July 2006, city residents approved the user fee by a 3-1 margin.

Mayor Danny Jones proposed doubling the fee not long after he was re-elected this year. He was the first mayor in 20 years to be returned to office for a second term. In November, only two of the city's 26 council members — Cubert Smith and John Miller — voted against raising the fee. Miller, who represents Ward 18 in Kanawha City, voted against the fee when it first came before council in 2004, but supported it when it was put on the ballot in July 2006. Miller said he now thinks the fee is going to strain the finances of working families. "It's going to affect the working poor and people on minimum wage," Miller said. Miller said city officials should have cut expenses instead of relying on citizens to balance the budget. "It's just going to be an additional hardship and burden for people to deal with," Miller said.

Although the fee is taken out of every employee paycheck, employers only remit the money to the city every three months. The added revenue won't show up in the city budget until April.

## **Internet – Newspaper Archives Searches David Molgaard**

(Articles are in reverse chronological order)

Charleston Daily Mail (WV) July 24, 2007

#### Mayor says bargaining bill is bad news Federal legislation would require cities to negotiate with public safety unions

Author/Byline: Jake Stump

Charleston Mayor Danny Jones fears that a collective bargaining bill moving through Congress would create dissension between his administration and the city's police and firefighters. The U.S. House last week passed the Public Safety Employer-Employee Cooperation Act of 2007 by an overwhelming 314-to-97 vote. The legislation grants collective bargaining rights to public safety officers employed by states or local governments. West Virginia state employees, including state police officers, do not enjoy collective bargaining rights. For at least 40 years, organized labor has unsuccessfully tried to push bills through the Legislature that would force the state and its municipalities to recognize public employee unions and bargain with them.

However, a few West Virginia cities, including Huntington, have passed ordinances on their own granting collective bargaining rights to their employees. City of Charleston public safety employees currently do not have collective bargaining rights. Under the House-passed bill pending in the U.S. Senate, states and municipalities would be required to have representatives negotiate with unions to achieve contracts dictating wages, benefits and working conditions. "We would go on the defense," Jones said. "We'd lose control of our budgeting process. "I'll deal with whatever is sent down from the federal government, but I don't understand the compulsion for the federal government to get into local affairs when they can't manage their own."

All three West Virginia House members - Republican Shelley Moore Capito and Democrats Alan Mollohan and Nick Rahall - voted in favor of the bill. The mayor questioned why Capito would vote with the Democratic majority last week. Collective bargaining is historically an issue backed heavily by Democrats. A spokesman for Capito did not respond to inquiries Monday.

Under the federal legislation, employers and employees would submit to an arbitration process for resolving an impasse in negotiations. That's one of the biggest turnoffs for Jones. "I'm against delegating the budgeting process to an outside arbitrator who doesn't live in the state of West Virginia," he said. Jones believes his administration has taken good care of its public safety workers, particularly firefighters and police officers, without collective bargaining. "Our firefighters are the highest-paid in West Virginia," the mayor said. "Firefighters and police have received a raise every year since I've been in office and I hope to continue that."

Charleston Police Lt. Steve Neddo acknowledges that the Jones administration has fairly accommodated employees. But future Charleston mayors may not be as generous to the city's public safety officers, Neddo said. "Collective bargaining gives us the right to sit down and talk," said Neddo, president of Fraternal Order of Police Capital City Lodge No. 74. "I don't see it as an adversarial type of situation. "The current administration has treated us well, but I've seen times when other mayors would throw us a bone and tell us to be happy." Capital City Lodge No. 74

## Internet – Newspaper Archives Searches David Molgaard

(Articles are in reverse chronological order)

represents officers in the cities of Charleston, Belle and Nitro, and has 350 active members. Neddo, a Charleston Police veteran of 24 years, said he recalls one mayor who literally turned his back to a group of officers asking for a pay increase. He remembers another instance, in the 1980s, when council members demanded the firing of uniformed officers seeking a pay raise.

Neddo said collective bargaining has remained a top agenda item for the national Fraternal Order of Police for several years. "Whatever they give us is what we get," he said. "If we want more than that, we go into collective begging. "Right now, I'm not complaining. Danny Jones has taken care of us. The problem is that we could run into a different administration that won't even talk to us."

Charleston public employees received a 3 percent pay raise this year. In previous years under Jones' reign, the city had given \$1,000 raises across-the-board annually. Of the city's \$70 million yearly budget, \$14.3 million is allocated for firefighters while police get \$12.8 million.

Jones isn't the only city official concerned about the potential passage of the collective bargaining bill. City Manager **David Molgaard** said the legislation could impose another unfunded mandate upon local governments. "This could leave council and the mayor to come up with ways to provide funding," **Molgaard** said. "There are only two ways to do that. You can take funding away from other priorities in city government or find a way to raise taxes or fees."

**Molgaard** is also opposed to the arbitration component of the bill. "In the worst case scenario, an independent arbitrator would resolve a dispute," he said. "That takes the spending prerogative away from the representatives voted into office who are charged with overseeing the budget. The stewardship of the taxpayers' coffers is taken away."

The bill now awaits Senate action. A similar bill is also expected to be introduced by Sen. Judd Gregg, R-N.H.

## Internet – Newspaper Archives Searches David Molgaard

(Articles are in reverse chronological order)

Charleston Daily Mail (WV) September 25, 2006

#### City pays average \$640,000 in claims

Author/Byline: Justin D. Anderson

Since 2001, citizens have filed an average of 118 personal injury and property damage claims every year against the city of Charleston. The city and its insurer have paid out a yearly average of \$640,000 on them, according to information compiled by the city attorney.

#### Here's the anatomy of a typical claim:

Margaret Mullins and her daughter-in-law, Patricia, were on their way back from an afternoon trip to the Capitol Market on Aug. 22. Patricia was driving Mullins' Buick Century to her Kenwood Road residence and had just crossed over the South Side Bridge on her way to Loudon Heights Road. A truck was rolling down Loudon Heights painting yellow lines on the pavement. "We got over as far as we could," Mullins said. "He just came down through there. He didn't realize he had sprayed our car." Now the driver's side of the car has a yellow stripe. Because the Mullinses believe the city of Charleston should have stopped traffic while the road lines were being painted, they filed a claim to pay for the damage to their paint job.

Over the last five years, a total of 592 claims have been filed. The numbers of claims filed annually against the city stayed pretty consistent over that time, except for 2003 when widespread flooding destroyed or damaged about 200 homes in Kanawha County. In all, 222 claims were filed against the city that year, the majority against the city engineer and street department. The city ended up forking over \$289,194 in property damage claims. "Many of those, I think, we handled without a lawsuit being filed," said City Manager **David Molgaard**. A lot of the cases were folks who filed affidavits for claims against the city that were later handled by the Federal Emergency Management Agency, he added.

Charleston's insurance policy currently requires the city to pay out of revenue anything up to \$300,000. For valid claims under \$15,000, city officials or the city's third party administrator usually just cut a check. Anything over \$15,000 must be approved by City Council. **Molgaard** said the city's insurance policy is somewhat unique in that it allows the city to assume more of the risk to keep the premium payments down. "We almost become a small insurance pool ourselves," **Molgaard** said. "It's worked very well for us."

Claims usually are the result of instances like people tripping over bricks on a downtown sidewalk, or a garbage truck backing into a vehicle. Sometimes, the incidents are more serious, as when former police officer Brandon Tagayun, on his way to a domestic violence call in Kanawha City, collided with a pickup truck driven by Patsy Sizemore, who was killed. The city ended up settling with the Sizemore family in July for \$1.8 million, the largest single payout in recent years. The city was responsible for paying \$300,000 of that amount.

C.

## **Section 7**

## Internet – Newspaper Archives Searches David Molgaard

(Articles are in reverse chronological order)

The police department has been responsible for the bulk of the claims the city has had to pay. Over the last five years, claims filed against the police department have cost \$539,006 in personal injury and property damage. The city ambulance service is next, costing \$350,000 on one claim for personal injury in 2001 and \$4,530 in property damage. The street department rounds out the top three, responsible for \$88,555 in injury claims and \$248,185 in property damage.

## **Internet – Newspaper Archives Searches David Molgaard**

(Articles are in reverse chronological order)

Charleston Daily Mail (WV) December 21, 2005

#### Budget has no real surplus, Molgaard says Revisions totaling \$11 million represent funds already committed to projects, purchases

Author/Byline: Justin D. Anderson

If the city of Charleston had nearly \$11 million to spread around in its budget, some may wonder why it can't just wipe out the user fee. City Manager David Molgaard said it's not that simple. The budget revisions passed Monday by city council dealt with money that was previously committed to projects or not yet dedicated to various accounts. A lot of the money was directed to initiatives meant to further the city's vision for vibrant tourism, increased revenue collection and quality of life issues, Molgaard said. "You can't say that we have a surplus, or excess funds sitting around," he said. "They're spoken for."

The state Supreme Court of Appeals this month ordered the city to hold an election on the user fee. City leaders have said street paving and police protection would suffer if citizens did not approve the fee, which amounts to a dollar a week for those who work in the city. The fee brings in an estimated \$2.5 million a year. The budget revisions included an additional \$800,000 in hotel/motel tax revenue after the council doubled the percentage it collected when a new state law went into effect over the summer. All of the money for the revisions was available in part because of conservative budgeting practices, Molgaard said. For example, the city budgets as if city workers make the maximum salary set for their positions. And it under-budgets for various revenue sources. The city also has \$4.2 million set aside for things that are budgeted but whose bills are not due yet. For instance, money is set aside for a fire engine the city ordered and budgeted last year, though it is not ready yet.

About \$1.3 million in user fee revenue was dedicated to street maintenance and police training by recognizing it in the budget. It was user fee revenue that had been collected, but not yet spent, city finance director Joe Estep said. About \$383,519 was dedicated to the city's lease and purchase program handled by the city manager. Another \$1.5 million was put into the general maintenance fund account to pay for infrastructure projects such as slips and sidewalks repair. "We did not budget anything for our general maintenance fund in this budget," Molgaard said. "We could have, but the more prudent thing to do would be to see where you end up. "We never run out of things to do around here. It's a matter of having funding to do it."

Council took into consideration about \$4 million in undedicated revenues from last financial year, of which an additional \$631,845 was added to cover anticipated increases in fuel and utilities costs. Molgaard's \$15,247 raise also came from these revenues. So did \$204,485 in salary and benefit expenses for eight new positions within five departments. The money will fund these positions for six months with the intent to make them full-time positions. "We've been very judicious in creating and not creating positions within the city," Molgaard said. "If you look at the positions we created, almost all of them are designed to bring in revenue. "Ultimately, they should pay for themselves."

## Internet – Newspaper Archives Searches David Molgaard

(Articles are in reverse chronological order)

About \$1 million was transferred to general maintenance, some of which will pay for improvements to City Hall, such as exterior cleaning and windows upgrades. Council dedicated \$33,000 to build a wall in Kanawha City to separate a residential area from a business district. To provide a \$1 million cushion for bad years in health care claims, council shifted \$200,000 into a reserve fund. "This year we had a very good year," he said. "Our claims were probably \$1 million less than what was projected."

The city had already committed itself to an aerial mapping project in conjunction with the Charleston Sanitary Board and had to dedicate \$175,000 to the project. Another \$300,000 was set aside for future design on the riverfront development master plan. Another \$82,500 was dedicated to the city's various festivals. "It's a matter of setting priorities to make Charleston a more attractive place to bring visitors," **Molgaard** said. "At the end of the day, we could close all the swimming pools and the recreational centers . . . We could just really scrimp by and come up with \$2.5 million, but who wants to live like that?"

By law, the city had to divvy up the additional hotel/motel tax revenue in a way that gave half to the Charleston Convention and Visitors Bureau and the rest to tourism-related items in the city. Council gave the bureau \$440,000 and divided the rest among various festivals and the mayor's office to help them attract convention guests. **Molgaard's** office was provided with \$60,000 to pay for a previous evaluation of the bureau's performance and design work for a canopy at Haddad Park.

## **Internet – Newspaper Archives Searches David Molgaard**

(Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **David D. Molgaard** is listed below.]

Charleston Daily Mail (WV) December 15, 2005

Views varied on city manager's raise Council finance panel agrees hike is warranted, but members disagree on the appropriate amount

Author/Byline: Justin D. Anderson

Tom Lane, Charleston City Council president and finance committee member, said a \$51,000 raise for City Manager **David Molgaard** would be justified. "I think the city has to be able to afford to pay people what their positions are worth," Lane said Wednesday. "If we don't, we will not be able to attract well-qualified people. "Our existing revenue sources are growing enough that we should be able to accommodate additional salaries in our top positions."

Other council members on the finance committee were not so generous in what they're willing to suggest for Molgaard's raise, though all agreed his position deserves a higher salary. The committee will take up the issue as early as Monday and may eventually take up raises for all managerial positions with the city.

Molgaard's salary has gotten particular attention because he has said he's been courted by other cities willing to pay him more. **Molgaard** currently makes \$79,000 a year.

Councilman John Miller said the city manager deserves a raise, but nothing exorbitant. And he doesn't believe the manager should make more than the mayor. For the current financial year, council approved an \$80,000 annual salary for the mayor. Miller at first said he could see Molgaard being bumped up to \$100,000, but then he changed his mind. "If that's the case, then the mayor would want a raise too," Miller said. "If you have that, you have a domino effect."

Councilman Bob Reishman, who chairs the finance committee, said any raise for the city manager would have to be within reason, no matter what other comparable cities are paying their managers. "I don't think we can always compete with other cities," Reishman said.

Reishman said Molgaard has been an asset to the city. "The city has benefited greatly from his work and dedication," Reishman said. "I certainly think it's important to do what we can to keep him."

## **Internet – Newspaper Archives Searches David Molgaard**

(Articles are in reverse chronological order)

Charleston Daily Mail (WV) October 25, 2005

#### City may shift drug benefit, Charleston officials hope to transfer \$401,000 - in liability to the federal government

Author/Byline: Justin D. Anderson

Charleston City Manager David Molgaard said he plans to eliminate current retiree prescription drug coverage for former city employees in favor of a new federal Medicare benefit available by the first of the year. In doing so, the city hopes to shift about \$401,000 in plan liability to the federal government by 2010 while the pool of eligible retirees rises from 340 to 495. An actuary completed analyses for two scenarios for retiree drug coverage by examining the various participants' costs should the city retain its current coverage and accept a federal subsidy or eliminate current coverage and help retirees pay their Medicare Part D premiums. "The analysis came back and showed that the federal government would actually be contributing a lot more to prescription drug benefits," Molgaard said of the latter scenario.

The new drug program was developed as part of the federal Medicare Modernization Act. Under the provisions of the act, employer subsidies were authorized equal to about 28 percent of retirees' prescription drug costs. "I think at the very least, it's understood that the city's going to pick up the premium for the federal government's plan by reducing the premium that the employees pay for the other health care coverage" offered by the city, Molgaard said.

If the city held its current course and accepted the federal subsidy, they city would be responsible for paying \$866,000 toward drug claims during the year 2010; the federal government would pay \$428,000; and the estimated 495 eligible retirees would pay \$834,000. By eliminating the prescription drug coverage and going with the federal benefit, the city's costs fall to \$284,000 while the federal government's costs rise to \$829,000 and retirees' to \$1.01 million.

**Molgaard** said by reducing premiums retirees pay for other health care coverage, the \$181,000 increase under the new drug plan could be offset. The effect on retirees by changing their prescription drug coverage will "basically be a wash" because of this offsetting process, Molgaard said. The details of how to proceed are still being worked out. "I don't think, as I understand it, everybody's going to see a deficit," Molgaard said. "The good, obviously, is there's \$400,000 neither the city nor the retirees are going to have to come up with by 2010 to cover prescription drug costs."

To compensate an anticipated "gap" in drug coverage apparently inherent to the federal plan, the city will be looking at other health care products to fill in the gap, Molgaard said. "This is something that's coming about all over the country," Molgaard said of the federal program. "I think as people learn about it and understand the significance, there's likely to be some questions."

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## **Section 7**

## Internet – Newspaper Archives Searches David Molgaard

(Articles are in reverse chronological order)

Charleston Daily Mail (WV) October 15, 2004

#### City slashes workers' comp costs,

Author/Byline: Brian Bowling

\* Officials focus on teaching employees ways to avoid injuries

Lifting with the knees instead of the back has helped Charleston cut its workers' compensation costs by more than half in the last three years, state and city officials said.

Bob Bess, director of safety and loss control for the Workers' Compensation Commission, said the city incurred an estimated \$815,244 from 168 injury claims in fiscal year 2001. By comparison, the 110 injury claims filed in fiscal year 2004 have an estimated cost of \$375,057. Most of the change was due to a \$533,255 drop in what the city's self-insured workers' comp program paid in wages to employees whose injuries caused them to miss work.

Tim Campbell, the city's safety coordinator, said each city department now has a risk management coordinator who conducts monthly safety training. The training focuses on each department's highest priority safety issue. Frequently, the highest priority is proper lifting. "Probably our biggest injury creator was improper lifting," Campbell said. "We probably had more back injuries than anything."

Bess made his report to a committee of the Workers' Compensation Board that oversees the disability insurance program's risk management efforts. Lisa Teel, the commission's director of employer services, said after the meeting that the reduction in lost-time wage payments shows the city has effectively decreased the severity of employee accidents.

**David Molgaard**, Charleston's city manager, said the city has implemented a risk management program that includes regular meetings and training on workplace safety. The program reviews accidents and assesses the layout of design of city workplaces. "We've been working with risk managers that have been provided by commercial insurance services," he said.

The company's self-insured workers' comp program is administered by CompManagement Inc. of Dublin, Ohio.

Campbell said getting employees to think about potential safety hazards, such as heavy loads, accounts for much of the improvement the city has seen in its workers' comp liabilities. "That's helping a whole lot," Campbell said.

## **Internet – Newspaper Archives Searches David Molgaard**

(Articles are in reverse chronological order)

Charleston Daily Mail (WV) November 10, 2003

Ex-collector sues city over firing, Man claims action was retaliation for taxing bank Author/Byline: Kris Wise

Charleston's former city collector has filed a lawsuit against the city, alleging he was fired after trying to collect business and occupation taxes from a bank on whose board former Mayor Jay Goldman served. James Jones, who served 18 years as city collector until his termination in November 2001, is asking for his job back, alleging he was wrongfully terminated because he helped initiate action that resulted in City National Bank having to pay more than \$1 million to Charleston in business tax.

A lawsuit filed last week in Kanawha County Circuit Court claims that once Jones "notified (Mayor Goldman) that he was going to attempt to collect the millions of dollars owed by City National Bank, the mayor began to act with hostility and indifference," toward Jones, the lawsuit states. Jones claimed he helped jumpstart an investigation that found City National Bank was withholding business taxes in many West Virginia cities, such as Charleston and Beckley, where it had branches. The bank claimed it was exempt from paying those cities' business and occupation taxes because it processed financial transactions elsewhere. In November of 2001, the Raleigh County Circuit Court ordered the bank to pay taxes for its branch in Beckley. The ruling helped set a precedent for the bank to pay up for all its locations in the state. Jones says he was fired "without cause" two days after the ruling was announced.

Goldman, who served as mayor from 1999 until June and still serves on the board of directors for City National Bank, said the lawsuit is without merit and Jones' firing was a direct result of his performance on the job. "We had has so many complaints from that office and we would get conflicting numbers so often," Goldman said today. "I was very concerned as to where the city was going as to its revenue and I wasn't getting the right answers."

An audit of the collector's office, done in October 2001 by Gibbons & Kawash, found more than 3,600 missing computer or paper files in Jones' office and collection mistakes that eventually forced the city to pay back about \$300,000 in overcollected business taxes and fees. Goldman said many city leaders and officials were involved in discussions about the office's disorganization, and "these decisions (to fire Jones) were not done in haste and the issue was not taken lightly." "He was there long time, he's a nice individual but I was very much performancebased," Goldman said. "The audit was not accusing anybody or even questioning their truth or veracity, but the operations of that office. The audit clearly identified what problems there were."

City Manager **David Molgaard** said based on allegations and complaints outlined in the lawsuit, "It doesn't appear to me the lawsuit has merit." "The decision to by the (city's) finance committee and counsel to let the employee go had a lot to do with the audit that was conducted," Molgaard said. Goldman, who still serves on the board of directors for City National Bank, said he was always careful throughout the investigation into the bank's tax issues to separate his duties as

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## **Section 7**

## Internet – Newspaper Archives Searches David Molgaard

(Articles are in reverse chronological order)

mayor from his responsibilities as a board member. Goldman said Jones did mention the city's attempts to collect taxes from City National, but the city manager and city attorney mostly handled the issue. "Anytime that came up, I would walk out of the room," Goldman said. "You know those are the type of issues you have to stay away from." The mayor also said the main investigation into the bank's tax-paying practices originated in Beckley, not Charleston.

Jones claims that problems in the audit "were of a housekeeping nature." He said prior to his attempts to collect taxes from City National Bank, "he had been held in high regard" by his employers. He also is suing the city for compensatory damages relating to his lawsuit and for attorney's fees. City records show that before his termination, Jones' annual salary as city collector was \$49,570.

## **Internet – Newspaper Archives Searches David Molgaard**

(Articles are in reverse chronological order)

Charleston Daily Mail (WV) July 8, 2003

Charleston city manager gets raise, Molgaard is highest-paid official aside from mayor Author/Byline: Josh Hafenbrack

David Molgaard has been Charleston's city manager for only three weeks, but he's about to get his first pay raise. At Mayor Danny Jones' request, Charleston City Council, in its first meeting Monday night, bumped the top pay grade for city manager to \$77,000 from \$70,000. Also, City Council approved combining two clerk-level positions into one higher-paying job in the city manager's office and raised the pay of another of Jones' department heads.

After the 27-1 vote, the city manager is now the highest-paid person in city government aside from the mayor, who makes \$80,000. Previously, the city manager, Civic Center manager and the police and fire chiefs all made \$70,000 Jones said he plans to pay Molgaard "in the low to mid-70s." But, Jones adds, he hopes the city manager makes more than the mayor by the end of his term.

Archie Chestnut was the only council member to vote against the raise, saying it was too early in the term. "You're supposed to give raises to people who perform," Chestnut, a 10th Ward representative, said. "It shouldn't work like this. We must be in the Land of Oz. In the real world, it's not done like that."

Jones, though, said the city needs to pay a wage competitive with the private sector to the city manager, who manages the city's 800-person work force and \$55 million budget. "The time to do it is in the beginning," the mayor said. "We want to keep (Molgaard) and show him we're willing to make an investment in him. "It's a reasonable amount."

In an effort to streamline the city manager's office, council also voted to eliminate the senior clerk and staff assistant positions, which pay \$23,107 and \$32,595, for the position of operations coordinator. The operations coordinator will make \$46,865. Molgaard said the operations coordinator will function as an assistant city manager, overseeing purchasing and bidding.

In the final pay-scale change, council approved increasing the pay of the human rights manager to \$58,962 from \$52,830. Jones said he requested the change to keep Brian King's salary the same as it was under the previous administration, when King was the parks and recreation director.

## **Internet – Newspaper Archives Searches David Molgaard**

(Articles are in reverse chronological order)

Charleston Daily Mail (WV) June 3, 2003

#### Great expectations, Molgaard, his colleagues confident he can do a good job as city manager

Author/Byline: Josh Hafenbrack

ASK his City Council colleagues about the kind of job they expect **David Molgaard** to do as Charleston's city manager and you'll get nothing but effusive optimism. The 40-year-old Republican is ending only his first term on council, but he has earned the deep respect of his brethren for his sturdy dedication and lawyer-trained eyes. He lost his re-election bid, but Molgaard ended up with the city's highest non-elected position as City Hall's No. 2 man. He will run the nuts and bolts of city government and manage the \$55 million budget under Republican Mayor-elect Danny Jones. "Given my background, my experience, my education - (being city manager) seems to be something that my life work has been leading to," Molgaard said. Molgaard was appointed to the \$70,000-a-year job by Jones, and he'll take over the post after the outgoing council, on which he serves, has its final meeting June 16.

A local lawyer, Molgaard once considered running for mayor himself but instead settled on trying for a second term as the West Side's 5th Ward representative. He lost in the Republican primary to Teresa "Tricky" Reed. Molgaard, though, quickly distinguished himself on council for delving in-depth into some of the city's most pressing issues. He became one of a handful of council members intensely involved in negotiations for Charleston's \$23 million baseball stadium and was part of Mayor Jay Goldman's famous - or infamous, depending on one's point of view - "inner circle." "David is an incredibly talented individual," said Republican Minority Leader Tom Lane. "He has...gained the respect of the current council as much as any first-term member I have ever seen." Molgaard's popularity stretches across party lines. "He is very smart, patient and even-tempered in his ways in council, and that proved to be very effective," said Democratic Majority Leader Charlie Loeb. "He commanded respect from all members on council for the intelligence and the fairness he brought."

As city manager, **Molgaard** will be on the other side of the administration-council divide. City managers have typically divided their duties into two areas: managing the city's day-to-day affairs and communicating the city's financial position to council. Mayor Jay Goldman has used his city manager, Sherry Risk, as a spokeswoman for his administration, but that role will likely be taken on by the media-inclined Jones and top aide Rod Blackstone. Since Molgaard just rose from the ranks of council, he's in a good position to communicate with the 27-member body, council leaders say. "He knows right off the bat where the major issues are that need to be addressed, and he'll also know a lot of the internal debate, how to handle those kinds of issues," Loeb said.

Added **Molgaard**: "I know how things come about, how they progress. I have seen how City Hall works, particularly from the council side of it. It's important to have a strong working relationship with members of council. They are the checks and balances on any administration."

## Internet – Newspaper Archives Searches David Molgaard

(Articles are in reverse chronological order)

As city manager, **Molgaard** will sit in on finance committee meetings - where most council decisions are made - and field questions on everything from why certain streets aren't paved and potholes aren't fixed to the city's most crucial financial questions. "They have to have an encyclopedic knowledge of all the things that are taking place," Lane said.

Jones said the chief reason he picked **Molgaard** to run City Hall was his experience, both on the finance committee and as a lawyer. "He is a young lawyer, he thinks legally, and I like to think I do, too," Jones said.

A Northern Panhandle native, **Molgaard** earned an undergraduate degree in English, a graduate degree in industrial and labor issues and a law degree from West Virginia University. He moved to Charleston in 1990 and has run a solo law practice, focusing on employment-related and personal injury law, since then. **Molgaard** has a wife, Amy, and a 9-year-old son, Ian.

"I'm going to approach my present position as I did with my first term on council - to assume that I might not have another opportunity to contribute to city government," he said. "I'm going to do the best job I can with this administration."

#### Internet – Newspaper Archives Searches David Molgaard (Articles are in reverse chronological order)

Charleston Gazette (WV) March 10, 2003

#### D.C. group attacks city wards' ethnic diversity

Author/Byline: Greg Stone

A civil rights group based in Washington, D.C., says it may sue the city of Charleston over what it says are racial inequities in city council wards. In a letter dated Feb. 24, the Lawyers' Committee for Civil Rights Under Law says it intends to file a complaint "to challenge the current system of elections for Charleston City Council." The committee's attorney, Cara Fineman, did not return a phone call. In the letter, she says she is representing REDEEM - a black advocacy group headed by Romona Taylor-Williams - plus the Charleston branch of the NAACP and several black residents of Charleston.

Of the 78 City Council candidates on Tuesday's primary ballot, 12 of them - 15.3 percent - are black. According to the 2000 U.S. census, 8,048 black residents are included among Charleston's 53,421 people, 15.3 percent of the city's population. "I guarantee you, this is the most [ever]," City Council candidate Cubert Smith said of the number of black candidates. "I've lived in the city 30 years." Smith, one of the 12 black candidates, is running as a Democrat in the 8th Ward on the West Side.

City Council has 20 ward representatives and six at-large members, who do not represent a specific ward. Last year, a special committee appointed by Mayor Jay Goldman and headed by Councilwoman Linda Nielsen added a 21st Ward to better equalize ward populations. Some council observers think 27 members is excessive for a city of 53,000, although the addition of the 21st Ward did not cause a particular uproar among council members. The D.C. group advocates a plan that would create 27 single-member wards that are "compact and not bizarre in shape," according to Fineman's letter. Some of Charleston's current wards are indeed unorthodox in shape, including the West Side's 4th Ward, which snakes out to take in the Orchard Manor housing project, and the East End's 11th Ward, which includes both a section of valley floor and the eastern hill along Greenbrier Street.

The group's plan would eliminate council's at-large positions and further shrink the size of wards. "The current redistricting plan splits African-American communities and although African-Americans comprise 15 percent of the city of Charleston, there is not one majority African-American precinct in the 21-district plan," the letter says.

Councilman **David Molgaard** sat in on a series of meetings in December, as Nielsen's committee dissected numbers and looked at several redistricting plans. The focus seemed to be on pure numbers, juggling some precincts from one ward to another to redistribute population. But the new ward it created, the 21st, is a mostly white, wealthy area above Kanawha City. "There might not be one majority African-American precinct, but there are two African-Americans representing wards," said **Molgaard**, an attorney. The council's two black members are Kenneth McKnight in the 4th Ward and Jim Harris in the 12th Ward. "We must be doing

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## **Section 7**

## Internet – Newspaper Archives Searches David Molgaard

(Articles are in reverse chronological order)

something right. They're getting elected out of wards that don't have a majority of minorities," **Molgaard** said. "I just don't see how our redistricting could've been anything other than it was." Both **Molgaard** and Smith point out that the state Legislature a few years ago carved out the 31st Delegate District in the middle of Charleston, in hopes of attracting minority representation. Since it was created, the district has been represented by Nelson Sorah, Mark Hunt and Carrie Webster, all of whom are white.

Black candidates running for City Council include Democrats McKnight and Geneva Foster and Republican Braxton Broady in the 4th Ward; Democrat Pamela Gwinn Minimah in the 6th Ward; Smith in the 8th Ward; Independent Janet Thompson in the 9th Ward; Democrat Charles Ellis in the 10th Ward; Harris in the 12th Ward; and Republican John Miller in the 18th Ward.

Charles Minimah and Jerry Ware, both black, are among 11 Democrats vying for six at-large nominations. Republican Tony Jackson is also an at-large candidate.

#### Internet – Newspaper Archives Searches David Molgaard (Articles are in reverse chronological order)

Charleston Daily Mail (WV) December 20, 2002

## Renewal proposals blasted - Black residents say city targeting their communities Author/Byline: Josh Jafenbrack

Most of the several dozen speakers who addressed city officials in Charleston City Hall's council chambers had one resounding message: They don't want the Charleston Urban Renewal Authority in their neighborhoods. At a two-hour public forum Thursday evening, two controversial proposals that would expand the authority's powers to combat run-down parts of town were presented to the public for the first time.

One proposal is to create a "scattered sites" urban renewal plan, which would allow the agency to condemn individual, dilapidated homes and tear them down. The city would then use federal funds to rebuild homes on the properties. The other, more contentious, idea is to create a "community preservation district," which ultimately would allow the authority to target the 36-block area in the East End for new projects by using eminent domain. No action was taken on either proposal.

Minorities at the racially polarized meeting said the agency is trying to destroy African-American neighborhoods. About a dozen East End residents who vehemently oppose the authority wore buttons that had the words "Eminent Domain Abuse" encircled with a red line drawn through it. They also held up signs that said things like: "Is it urban renewal or black folk removal?" and "CURA: stop targeting the black community." Another sign, invoking the controversy that has engulfed U.S. Sen. Trent Lott, R-Miss., over his remarks about segregation, said, "Introduced by America's Greatest Dixiecrats."

Allowing the authority to create the community preservation district drew the most heated response. The plan is similar to one that was shelved earlier this year when a fury erupted over the agency's plan to tag the East End area north of Washington Street as "slum" and "blighted." This proposal doesn't use either of those words, instead saying that it would allow the agency to pursue projects that could spruce up the neighborhood before it further deteriorates. Nevertheless, the plan was harshly criticized by about 20 black residents who said it is an attempt to displace minority communities.

Shelise Taylor, 32, said her grandparents were uprooted by an urban renewal project similar to the one Charleston is considering. "Now my parents are going to be forced out with the exact same thing," she said. Robert Hardy said, "We used to call it Urban Move the Brothers. I have seen the displacement of our community, and it has scattered our people."

Some people supported the community preservation plan, which has been approved by the agency. John Hicks said he lives in an area of the East End that would be included in the community preservation district. He said his property values are half that of homes a block away,

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## **Section 7**

## Internet – Newspaper Archives Searches David Molgaard

(Articles are in reverse chronological order)

and he's for any idea to fix-up neglected parts of town. "There has to be a force; there has to be some help," he said.

Councilman **David Molgaard**, who helped craft the community preservation proposal, said the issue is being mischaracterized. If City Council passes the community preservation district, it would not authorize any specific action, but only endorse the idea. Specific uses of eminent domain or any new projects would go through their own set of public hearings and must be approved by the agency and City Council, during which time residents could voice their opinions. "There's a gross misunderstanding as to what this resolution does," **Molgaard** said.

Meanwhile, the "scattered sites" plan garnered more sedate debate but was still met with skepticism. Several residents said if the city were to enforce the housing standards on the books, it wouldn't need the new proposal. The scattered sites plan, modeled after similar programs in other West Virginia cites, would allow the city to create a list of run-down homes that the authority would use eminent domain to take over and demolish. The agency would invest \$100,000 into a revolving fund that would be used for the property acquisition and demolition. Then, the city would rebuild on the properties using federal funds.

#### Internet – Newspaper Archives Searches David Molgaard (Articles are in reverse chronological order)

Charleston Gazette (WV) December 6, 2002

Councilman Molgaard won't seek mayor's job, he says

Author/Byline: Greg Stone

Charleston City Councilman **David Molgaard** became the latest local politician to pass up a bid for mayor. At a media conference at City Hall Thursday, **Molgaard** said he would not seek the Republican nomination against Danny Jones. No other Republicans have announced their candidacy.

Those who had urged him to run flattered him, **Molgaard** said, but ultimately his decision seemed to weigh most heavily on two factors: his relative lack of experience in government and the heavy name recognition of Jones and Democrat Chris Smith. "It might be better to take the time to mature, learn the ropes and develop more relationships," said **Molgaard**, 39, a private attorney. **Molgaard** had never held political office before running for council in 1999.

On council, he has quickly developed a reputation as an innovative problem solver, one willing to listen to a broad range of opinions, and as an astute observer on matters of finance. He was particularly instrumental in insisting on a "second chance" for offending city employees when council passed random drug testing earlier this year. **Molgaard** also served as an integral part of the negotiating team that worked out a new baseball stadium lease deal with Charleston Alley Cat owner Tom Dickson.

**Molgaard** said he would again run for council in his 5th Ward, part of which lies in the Edgewood section of the West Side. He did not rule out a later run for mayor, perhaps in 2007. "Hold that thought," he said Thursday of people who urged him to run this time around.

"I thought he was going to run," said fellow West Side council member Henry Knauff. "I think he's very well qualified for the job. If Mayor Goldman has a weakness, it's that he has never served on council." Knauff said council experience would make a mayor more sensitive to seeing that his department heads respond to the requests of council and the public.

"I'm glad he's going to wait," said **Molgaard**'s wife Amy, accompanied by their son Ian. "I think it's in his best interest, but I do hope to see him run in four years instead of eight or 12. "We made the right decision. We want to win."

Another potential Republican candidate for mayor, Councilman John Charnock, said he would probably announce whether he would run next week

## **Internet – Newspaper Archives Searches David Molgaard**

(Articles are in reverse chronological order)

Charleston Daily Mail (WV) October 9, 2002

City after lawyers to pay up - Council hires attorneys to find way to collect business tax Author/Byline: Josh Hafenbrack

Mayor Jay Goldman's thinking was simple: hire lawyers to go after lawyers. Lawyers, more precisely, who don't pay business and occupation tax revenues. Many out-of-town attorneys who descend on Charleston for mass litigation like the ongoing asbestos trial, city officials said, never fork over B&O taxes from their winnings. So Charleston City Council hired lawyers of its own to go after the transient attorneys who win settlements in Charleston-based trials. On Monday, City Council hired two Charleston firms, The Tinney Law Firm and George and Lorenson, to research the issue and set up a system by which city officials can track non-resident lawyers who try cases in the capital city. This would allow the city to take its share of the earnings, they say. "I think there's a tremendous potential for this thing," said Goldman, who has been working on the project for several months. The city could collect from both plaintiffs' attorneys, who primarily work on a contingency fee basis, and defense attorneys, who mostly earn at an hourly rate, Goldman said. The B&O collection argument is grounded on sound legal footing, said John Tinney, one of the lawyers representing the city. All business earnings in city limits, including lawyer contingency fees, are subject to B&O taxes, he said. "It's a fairly straightforward position," he said. "All of the West Virginia lawyers have been paying (B&O taxes) for years." In fact, once a system is in place to collect the overdue money, the city can go back up to three years - the statute of limitations - and collect B&O taxes from lawyers whose cases have long since been settled, Tinney said. But Tinney did, however, acknowledge there is no precedent in West Virginia for a case like this, and a legal challenge from out-of-state attorneys is all but inevitable. The city's take would come from lawyer contingency fees, not overall settlements. For example, if a jury handed down a \$1 million award, the portion gobbled up by attorney fees could be 40 percent, or \$400,000. The city charges a 1 percent service fee, so it would be entitled to \$40,000 of that pot, Tinney said. Goldman said with high-profile cases coming through the seven circuit courts and several federal courts located downtown, the city could see a "tremendous" windfall in B&O revenue.

The plan has broad-based support from City Council, but several council members are worried the city might rack up lawyers' fees of its own before it sees any benefit. The two law firms are charging the city both on an hourly basis, ranging from \$85 to \$200 per hour, and a 25 percent contingency fee. Goldman appointed a council oversight committee of four lawyers - David Molgaard, Tom Lane, Larry Roller and Charlie Loeb - to make sure money isn't being wasted. **Molgaard**, a Charleston attorney, said the \$200-per-hour charge is pretty steep, even for modern-day lawyers. "That's a pretty healthy rate," he said. Tinney, a senior partner at his selftitled law firm, said all of the lawyers discounted their rates out of deference to the city government. The city can get out of its agreement with the two law firms at any time if they are not proving advantageous, Goldman said. "We want to be sure that we're not overpaying the attorneys," the mayor said. "We don't want to ramp up all these legal fees and find out we really don't have a case. If the costs are getting prohibitive, we'll cut them loose."

## Internet – Newspaper Archives Searches David Molgaard

(Articles are in reverse chronological order)

Charleston Daily Mail (WV) September 25, 2002

#### West Side - A stronger police presence must be part of the answer

Author/Byline: Dmedit

WEST Virginians have few expectations left. They expect the hills to be there tomorrow. They expect the rhododendron to bloom in the spring. They expect the crime rate to be low. This year, life on the West Side of Charleston got the unexpected. Gunmen were shooting people. One 30-day period this summer saw 10 shootings.

Police took action. They determined that drugs and prostitution led to many of the shootings. And so police cracked down on these "victimless" crimes. The police used reverse drug stings, in which undercover officers sell drugs and arrest the buyers. K-9 foot patrols were put on the street in the evenings to discourage prostitution.

A police presence alone will not solve the crime problem, Councilman **David Molgaard** said. "This summer has been worst than most in the past," **Molgaard** said. "I do believe that we need to be looking at other alternatives and change some of the elements that cause these incidents. And we have to look at maybe more non-traditional ways of doing that other than throwing police at it."

The Tiskelwah Center now provides alternative activities to crime. **Molgaard** said the center will help restore community pride. In the long run, perhaps this will turn the West Side around. Until then, however, the police are properly giving the West Side special attention. The people of the West Side have a right to live in peace, without fear and trepidation. Charleston should not put up with anything less.

## Internet – Newspaper Archives Searches David Molgaard

(Articles are in reverse chronological order)

Charleston Gazette (WV) October 2, 2001

#### City OKs new policy for drug testing

Author/Byline: Greg Stone

Thanks to relatively impassioned crusading from Councilman **David Molgaard** Monday night, City Council passed a "second chance" drug-testing policy. Council approved **Molgaard**'s amended version of the drug bill 14-11, despite sharp opposition from colleagues Ed Talkington, Ditty Markham and others.

**Molgaard** has argued for months during the bill's formation in council's rules and ordinances committee, that the about 800 city employees to be tested should not be automatically terminated upon a positive urine test.

Both the amended section of the bill and the total bill passed. The city's drug policy will take effect in five days, City Manager Sherry Risk said. Under the amended version, employees will keep their jobs when they test positive if within 48 hours they waive their right to a hearing before any applicable board.

Further, the employee must pay for a treatment program and submit to unannounced testing of six or more tests in the following 12 months. He must agree that the city be privy to details of his treatment. A substance-abuse professional may certify that the person is fit to return to work.

"I think the city may be facing a liability nightmare for not firing a person the first time," Talkington said. Charlie Loeb, majority leader and rules and ordinances chairman, agreed. "I'm concerned for the man on the street," Loeb said. **Molgaard**, a lawyer, conferred with City Attorney Jill Harlan, who said she doubted the city would be liable for damages inflicted by an employee. Councilman Larry Roller shook his head in disagreement.

Firing a person upon the first positive test only creates an unemployed person who probably won't be able to find another job, **Molgaard** said. "We're not addressing the problem," **Molgaard** said. "Are we really doing anything? No, not unless we give the person a second chance."

**Molgaard** pointed to a Sept. 4 proclamation by Mayor Jay Goldman declaring "Drug and Alcohol Recovery Week" and extolling the work of substance-abuse therapists. Council President Howard Quick supported **Molgaard**'s amendment. "I don't how many of you go to church," Quick said, "but the Lord gives us more than two chances."

## Internet – Newspaper Archives Searches David Molgaard

(Articles are in reverse chronological order)

Charleston Daily Mail (WV) April 3, 2000

## Actually, one vote can count - Elections have been decided by single person Author/Byline: Brad McElhinny

- EDITOR'S NOTE: With the hope of educating and motivating readers to vote, the Daily Mail will feature articles every Monday between now and the May 9 primary on the electoral process in West Virginia.

Who says your vote doesn't count? One vote made the difference in **David Molgaard**'s primary race for Charleston City Council. The same goes for Eleanor Mayor John Harris, who tied in a race for Town Council several years ago and conceded the seat. Joyce Abbott won her seat on Bancroft Town Council after a tie. St. Albans resident Rick Adkins won a Town Council race by one vote and earned the nickname "Landslide."

"You'd be surprised the number of people who come up to you and tell you they just didn't make it to the polls that day," **Molgaard** said. "That was definitely a classic civics lesson as to how every vote counts. Don't miss an election."

The odds of being the determining factor in a national presidential race are astronomical. But in a local election, where few votes are cast anyway, there's a chance your vote might decide a race.

"When you're just one vote shy," **Molgaard** said, "you think of one more thing that could have been done, one more person you could have called, someone else's problem you could have listened to."

In his 1999 City Council primary race to represent the Edgewood area of Charleston's West Side, **Molgaard** actually lost by one vote when the results were calculated on election night. But then one challenged ballot was added to the total two days later. That vote turned out to be for **Molgaard**. The Republican Party's executive committee voted for **Molgaard** to represent the party in the general election, which **Molgaard** won.

## **Internet – Newspaper Archives Searches David Molgaard**

(Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **David D. Molgaard** is listed below.]

Charleston Daily Mail (WV) March 13, 1999

#### Final election tally changes outcome in council race

Author/Byline: Todd C. Frankel with contributions by Kristen Young

A final tally of Tuesday's city election changed the outcome in a West Side council race in which two Republican candidates were separated by just one vote. In the city's closest race, Teresa A. Moore had been proclaimed winner of the 5th Ward council seat, edging out **David D.** Molgaard by only a single vote, 84-83. But Molgaard picked up one vote after the addition of uncounted ballots on Friday. The race is now a tie. A total of 132 ballots remained to be counted following Tuesday's citywide primary election.

The votes had been challenged, or excluded from the count, by poll workers for a variety of technical reasons. Friday, in the Kanawha County Voters Registration Office, the city's board of canvassers prepared to announce a final tally. "This is not something I wanted to see," Moore said of the results. "But I knew there were challenged ballots. I knew this was a possibility when I went in." But **Molgaard**, back in the race, is relieved. "Obviously, I'm very pleased that I'm still in the running," Molgaard said. "I'm happy our hard work and effort has not been for not just yet."

The situation was unusual enough situation to require City Clerk Fred Fisk to dig deep into the City Code for a resolution. He said the tiebreaker would be decided in a runoff vote by the 20 members of the Republican Executive Committee. But before that takes place, Molgaard plans to ask the other candidates to join him in requesting a recount. A third Republican candidate in the race, Edgell Turley, followed Moore and Molgaard by only three votes. "It makes more sense to come together and ask for a recount," Molgaard said this morning. "If it's still a tie, we'll have to see what state provisions ask for." Candidates must request a recount within 48 hours of the canvass, and must post a \$300 bond, Molgaard said.

Moore said she won't support a recount. "We all worked hard, and you can see it in the results," Moore said. "Now, whoever wins, wins." Moore said she'll "keep her fingers crossed and hope for the best." After five hours of tabulating new ballots, the board of canvassers, made up of three city councilmen, declared the election official on Friday. Forty-eight hours following their decision, which came at about 2:30 p.m. Friday, the election will be certified. Ceremonial certification will take place at a special council meeting on Tuesday.

The day of canvassing was not without its challenges. Tuesday's election presented a special problem because the threat of inclement weather and a mini-epidemic of the flu caused more than 50 emergency poll workers to be called in to work.

C.

## **Section 7**

# Internet – Newspaper Archives Searches David Molgaard

(Articles are in reverse chronological order)

Regular poll workers had been instructed to vote with an absentee ballot, but the last-minute workers did not have that opportunity. If they worked at a poll outside their precinct, their vote was not initially counted. The votes of emergency poll workers made up the bulk of the 123 new ballots counted on Friday. The remainder consisted of other scenarios, like change-of-address requests that had not yet been processed. No other races were changed because of the new ballots.

Research Compiled by: Nicole Simkins

Colin Baenziger & Associates



# Section 10 David A. Strohl Belle Isle City Manager Candidate Report

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# Section 10

## **TABLE OF CONTENTS**

|                         | PAGE |
|-------------------------|------|
| COVER LETTER AND RESUME | 1    |
| CANDIDATE INTRODUCTION  | 9    |
| BACKGROUND CHECKS       | 15   |
| CB&A REFERENCE NOTES    | 19   |
| INTERNET SEARCH         | 31   |

# Cover Letter and Resume

#### DAVID A. STROHL, ICMA-CM

19755 Sunset Court, Tinley Park, Illinois 60487-4422 • 309-253-3923 • dastrohl@comcast.net

April 24, 2023

Colin Baenziger & Associates 2055 South Atlantic Avenue Suite 504 Daytona Beach Shores, Florida 32118

To Whom It May Concern:

Please accept this letter as application for the position of City Manager of the City of Belle Isle, Florida. My résumé accompanies this letter for your review and consideration.

As you can see from my résumé, I am an ICMA Credentialed Manager with more than twenty-five years of local government management experience. I am currently serving as City Administrator of the City of Palos Heights, Illinois, a community with a population of approximately 12,000. Palos Heights is an upscale community with a high quality of life. As City Administrator, I serve as the Chief Administrative Officer responsible to the Mayor and eightmember City Council of this full-service municipality for the management of municipal operations. During my tenure with the City, much of my attention has been on conducting an analysis and assessment of the organization and identifying opportunities for increased effectiveness and efficiency of operations and service delivery and on positioning the City to better pursue economic development.

Prior to my current position, I served as the Village Administrator of the Village of Forsyth, Illinois, a community with a population of approximately 3,500, for a period of more than seven years. Forsyth is also an upscale community with a high quality of life and is home to the area's regional shopping mall and additional retail, restaurant, and hotel development. As Village Administrator, I served as the Chief Administrative Officer responsible to the Village President and six-member Board of Trustees for the management of municipal operations. Prior to my service in Forsyth, I served as the Business Manager of the Village of Morton, Illinois, a community with a population of approximately 16,300, for a period of nearly twelve years. Morton is also an upscale community with a high quality of life, being the recipient of many accolades from a variety of sources. As Business Manager, I served as the Chief Administrative Officer and was responsible to the Village President and six-member Board of Trustees of this full-service municipality for the management of the administrative operations and the performance of economic development duties. Prior to my service in Morton, I served as the first City Administrator of the City of West Peoria, Illinois, a community with a population of approximately 5,300, for a period of more than five years. Beginning my employment with the City less than a year after its incorporation provided me with the opportunity to develop and implement many of the City's policies, procedures, and practices, to develop the municipal organization, and to work on many of the City's "firsts."

These and other positions have provided me with experience in managing, supervising, and/or performing many local government administrative, management, and operational functions. In addition to my broad base of experience, I offer a commitment to conservative fiscal management and to effective, efficient, high-quality service delivery, as well as a management philosophy emphasizing communication, consensus-building, openness, and teamwork. I am also a dedicated and hardworking individual who continually strives for the highest level of achievement, ethics, and professional conduct and who is committed to assisting the governing body set strategic priorities and achieve its desired goals and objectives.

I am looking for a local government management position which will provide me with an opportunity to utilize my more than twenty-five years of local government management experience in a dynamic, ethical, forward-thinking, innovative, and progressive organization that embraces and encourages innovation, change, and appropriate risk-taking and that is committed to continuous improvement, and which will provide me with an opportunity to confront a variety of new challenges and with opportunities for professional and personal growth and development.

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# **Section 10**

I believe that I am well qualified for this position and that I can make a valuable, long-term contribution to the City of Belle Isle by assisting it to achieve the strategic goals and objectives of the organization and the community and to respond to the ever-increasing challenges that units of local government must successfully address in order to prosper in the continuously changing and increasingly complex local government environment. I would welcome the opportunity for a personal interview to discuss my qualifications in more detail. Thank you for your time and consideration. I look forward to hearing from you.

Sincerely,

David A. Strohl

David A. Strohl

#### DAVID A. STROHL, ICMA-CM

19755 Sunset Court Tinley Park, Illinois 60487-4422 309-253-3923 dastrohl@comcast.net

#### PROFESSIONAL EXPERIENCE

#### City Administrator, City of Palos Heights, Illinois

July, 2021 - Present

Chief Administrative Officer responsible to the Mayor and eight-member City Council for the management of the municipal operations of a full-service, non-home rule municipality operating under the mayor-council form of government.

#### General Administration And Management

- Assist the Mayor as Local Liquor Control Commissioner administer and enforce state and local liquor codes within the corporate limits of the City.
- Draft ordinances and resolutions.
- Initiated and coordinating the ongoing process of redistricting the City's wards as a result of the 2020 Decennial Census.
- Manage and supervise the maintenance of the City's information technology (IT) infrastructure and telephone system.
- . Manage and supervise the maintenance of the City's World Wide Web site.
- Manage and supervise the operations of the City's cable television government access channel.
- Manage and supervise the preparation and distribution of meeting agendas and meeting packets for meetings of the City Council and meetings of City Council Committees.
- Manage and supervise the production and distribution of the City's monthly newsletter.
- Negotiated an intergovernmental agreement with a neighboring municipality for the sharing of costs related to an outdoor warning siren.
- · Perform community, intergovernmental, and media relations activities.
- Provide general administrative assistance and support to the Mayor and City Council.
- Responsible for the administration and oversight of the City's residential waste collection and recycling contract. Oversaw the negotiation of a renewal of the City's residential waste collection and recycling contract.

#### **Budgeting And Financial Management**

- Initiated the adoption of the Budget System and serve as Budget Officer.
- Manage and supervise the accounts payable, accounts receivable, and payroll functions.
- Manage and supervise utility billing, collections, and customer service operations for the City's waste water and water utilities.
   Monthly billing to 300+ commercial customers and quarterly billing to 5,000+ residential customers.
- Responsible for the preparation and administration of the annual operating and capital budgets, as well as the preparation of the
  annual appropriation ordinance (prior to the adoption of the Budget System) and the tax levy ordinance.

#### Community And Economic Development

- Created the position of Community Event Coordinator in order to develop, promote, and conduct community activities and events
  that contribute to and enhance the quality of life of residents and that contribute to and enhance a sense of community among
  residents.
- Oversee the management of one existing Business District and the ongoing development of a new Business District within the City.
- Oversee the management of two existing Tax Increment Financing (TIF) Districts and the ongoing development of a new Tax Increment Financing (TIF) District within the City.

#### Human Resource/Personnel Management

- Manage and supervise all aspects of the City's human resource/personnel management system.
- · Serve as a member of the City's collective bargaining team (two collective bargaining units).

#### Public Works

- Oversaw the development of a ten-year capital plan for the City's water utility.
- Oversee the ongoing application process for an Illinois Environmental Protection Agency (IEPA) loan for \$15,000,000+ in water system capital projects.
- Oversee the ongoing planning for the remodeling of City Hall and an abandoned regional dispatch center located adjacent to City Hall.

#### Risk Management

- Manage and supervise all aspects of the City's risk management program.
- Serve as a Delegate on the Board of Directors of the Intergovernmental Risk Management Agency (IRMA).

#### Village Administrator, Village of Forsyth, Illinois

January, 2014 - June, 2021

Chief Administrative Officer responsible to the Village President and six-member Board of Trustees for the management of the municipal operations of a full-service, non-home rule municipality operating under the mayor-council form of government.

#### General Administration And Management

- Assisted the Village President as Local Liquor Control Commissioner administer and enforce state and local liquor codes within the corporate limits of the Village.
- Drafted ordinances and resolutions.
- Initiated and oversaw the creation of a new Village logo. Managed the implementation of the new logo across the organization.
- Initiated conducting a citizen/community survey on a biennial basis to determine satisfaction with the services provided by the Village and other pertinent information. Developed survey instrument.
- Initiated the conversion of forms used by the public to fillable PDF documents and posting them on the Village's World Wide Web
  site in order to provide better service to the public.
- Initiated the posting of the meeting packets for meetings of the Board of Trustees on the Village's World Wide Web site in order to
  promote openness and transparency.
- Initiated the practice of having no open liquor licenses in order to provide greater control by the Board of Trustees over potential new licensed establishments.
- Initiated, coordinated, and participated in strategic planning activities and developed resulting strategic plan document. Responsible for implementing strategic plan.
- Led the process for the Village's participation in a County-wide mass/public notification system, working in a cooperative regional
  manner to obtain emergency notification capabilities to alert residents to emergency situations while achieving significant cost
  savings.
- Managed and supervised the maintenance of the Village's information technology (IT) infrastructure and telephone system.
- · Managed and supervised the maintenance of the Village's World Wide Web site.
- Managed and supervised the production and distribution of the Village newsletter. Initiated and led the transition from publishing
  a paper newsletter that was mailed to each resident two times a month to publishing an electronic newsletter that was e-mailed to
  subscribers on a quarterly basis, saving considerable time, money, and effort.
- Performed community, intergovernmental, and media relations activities.
- · Prepared and distributed meeting agendas and meeting packets for meetings of the Board of Trustees.
- Provided general administrative assistance and support to the Village President and Board of Trustees.
- Responsible for the administration and oversight of the Village's cable television, electric, natural gas, and telephone franchise
  agreements. Negotiated a renewal of the Village's cable television franchise agreement.
- Responsible for the administration and oversight of the Village's intergovernmental agreement with the Macon County Sheriff's
  Office for the provision of police services. Negotiated two (2) renewals of the police services agreement.
- Responsible for the administration and oversight of the Village's municipal electric aggregation program.
- Served as Freedom Of Information Act (FOIA) Officer and as Open Meetings Act (OMA) Officer.

#### Budgeting And Financial Management

- Initiated online utility bill presentment and payment system.
- Initiated the conversion of the Village's fiscal year from May 1-April 30 to January 1-December 31 in order to better align the fiscal
  year with numerous events and processes.
- Initiated the establishment of a special revenue fund to account for the tax levied and imposed by the Village upon the use and
  privilege of renting a hotel or motel room within the Village in order to promote accountability for such revenue.
- . Initiated the outsourcing of printing and mailing utility bills, thereby reducing costs and allowing staff to perform other duties.
- Managed and supervised the accounts payable, accounts receivable, and payroll functions.
- Managed and supervised utility billing, collections, and customer service operations for the Village's waste water and water utilities.
   Monthly billing to 1,500+ customers.
- Responsible for the preparation and administration of the annual operating and capital budgets, as well as the preparation of the tax levy ordinance.
- Served as Budget Officer.

#### Community And Economic Development

- Created the position of Community and Economic Development Coordinator and hired the Village's first community and economic
  development professional in order to better address community and economic development issues.
- Created the position of Event Coordinator in order to develop, promote, and conduct community activities and events that contribute
  to and enhance the quality of life of residents and that contribute to and enhance a sense of community among residents.
- Initiated a review of and revisions to code enforcement procedures and the creation of the position of Code Enforcement Officer in order to better address code enforcement issues.
- Initiated a review of and revisions to land use regulations in order to ensure the effectiveness and practicality of such regulations.
- Initiated and led the acquisition and development of a geographic information system (GIS).
- Initiated and led the process of establishing the Village's first Tax Increment Financing (TIF) District in order to create a funding
  mechanism for commercial and residential development within the Village. Initiated and led the process of expanding the Village's
  Tax Increment Financing (TIF) District.
- Initiated the requirement that the Village Attorney attend the meetings of the Planning and Zoning Commission in order to improve the conduct of business at such meetings.
- Led the process for the development of zoning regulations for medical marijuana facilities.
- Led the process for the Village's inclusion in a proposed new multi-jurisdictional Enterprise Zone.
- Managed the Village's tourism program, with the goal of promoting tourism and attracting nonresident overnight visitors. Managed
  the Village's tourism grant program, which provided funding each year from the Village's hotel/motel tax revenues to local
  organizations to promote activities and events within the Village and the surrounding area that promoted tourism and attracted
  nonresident overnight visitors. Developed policies and procedures regarding the operation of the Village's tourism grant program
  in order to provide for a more orderly and objective decision-making process.
- Oversaw the application process for an Illinois Department of Natural Resources (IDNR) Land and Water Conservation Fund (LWCF) grant for the acquisition of more than 70 acres of land for the location of a family sports and nature park.
- Oversaw the management of more than 100 acres of land owned by the Village for the purpose of future residential development, but which was farmed until development occurred.
- Oversaw the process of acquiring approximately 15 acres of abandoned railroad right-of-way from the United States Department
  of the Interior for the purpose of developing a recreational trail.
- Participated in the process of examining potentially developing a family sports and nature park as both a community asset and a sports tourism destination.
- Served as Plat Officer.
- Served as Zoning Officer/Zoning Official.
- · Served on the Board of Directors of the Economic Development Corporation of Decatur and Macon County.
- Served on the Community Marketing Governance Committee, overseeing an area-wide branding and marketing initiative.
- Served on the Enterprise Zone Advisory Board.
- Served on the Village's Community Center Committee examining the issue of potentially building and operating a community center.
- Successfully negotiated several Tax Increment Financing (TIF) redevelopment agreements.

#### Human Resource/Personnel Management

- Managed and supervised all aspects of the Village's human resource/personnel management system.
- Initiated and implemented a Section 125 (Premium-Only) Plan.
- Initiated and implemented the increasing of the annual work-hour threshold for participation in the Illinois Municipal Retirement Fund (IMRF) in an effort to decrease the number of part-time employees eligible for participation, thereby lessening the labor costs of the Village.
- Performed labor relations activities, including handling of grievances and serving as a member of the Village's collective bargaining team (one collective bargaining unit).

#### Public Works

- Initiated a review of and revisions to subdivision construction standards and practices in order to ensure that development is
  constructed and infrastructure is installed so as to last a reasonable amount of time in order to save taxpayers' money in the future.
- Initiated the development of regulations regarding the installation of personal wireless service facilities in Village rights-of-way and on private property.
- Initiated the performance of a street pavement assessment to provide objective evaluation of the Village's street infrastructure to
  assist in the capital planning process.
- Initiated the practice of conducting open houses for major public works projects in order to facilitate better communication between the Village and property owners and residents affected by such public works projects.
- Initiated the practice of performing design work for public works projects during one calendar year and construction the following calendar year in order to allow for the orderly and timely completion of public works projects.
- Led the process for the Village's participation in a regional effort to protect the Mahomet Aquifer from contamination from a
  proposed hazardous waste disposal site.
- Oversaw the acquisition of extraterritorial property for the purpose of locating a water well.
- Oversaw the application process for an Illinois Environmental Protection Agency (IEPA) loan for \$6,000,000+ in water system capital projects.
- Responsible for the administration and oversight of the Village's municipal electric and natural gas supply contracts for the supply
  of electricity and natural gas to Village facilities.
- Served on the Policy Committee and the Technical Committee of the Decatur Urbanized Area Transportation Study (DUATS).

#### Risk Management

Managed and supervised all aspects of the Village's risk management program.

#### Interim City Administrator, City of La Grange, Missouri

July, 2013 - January, 2014

Chief Administrative Officer responsible to the Mayor and six-member City Council for the management of the municipal operations of a full-service, Special Charter municipality operating under the mayor-council form of government.

- Conducted a review of existing bank and investment accounts in order to provide for effective cash management practices.
- Implemented weekly staff meetings in order to facilitate management of municipal operations and communication and cooperation across departmental boundaries.
- Initiated and led the process of reviewing City records in order to identify records appropriate and eligible for destruction and
  records required to be retained according to record retention requirements, organizing those records required to be retained, and
  destroying those records appropriate and eligible for destruction.
- Initiated the creation of a formal order of business for regular meetings of the City Council in order to improve the conduct of business at regular meetings of the City Council.
- Initiated the creation of a formal policy regarding public participation at meetings of the City Council in order to improve the conduct of business at meetings of the City Council.
- Initiated the preparation of monthly budget-to-actual reports and the distribution of those monthly budget-to-actual reports to the Mayor and City Council and to Department Heads in order to improve financial oversight by the Mayor and City Council and by Department Heads.
- Initiated the requirement that the City Attorney and Department Heads attend both regular meetings of the City Council each month
  in order to improve the conduct of business at regular meetings of the City Council.
- Led the process of evaluating the appropriateness of converting the City's health insurance plan from a fully-insured plan to a selffunded plan.

Led the process of soliciting and evaluating proposals for electronic mail and World Wide Web site services. Led the process of
migrating the City's electronic mail and World Wide Web site to new service providers.

#### In Transition (As a result of previous position being eliminated)

January, 2012 - July, 2013

#### Business Manager, Village of Morton, Illinois

March, 2000 - December, 2011

Chief Administrative Officer responsible to the Village President and six-member Board of Trustees for the management of the administrative operations of a full-service, non-home rule municipality operating under the mayor-council form of government.

#### General Administration And Management

- Assisted the Village President as Local Liquor Control Commissioner administer and enforce state and local liquor codes within the corporate limits of the Village.
- Coordinated the Village's municipal electric aggregation effort.
- Drafted ordinances and resolutions.
- Initiated and developed the Village's first official World Wide Web site. Supervised the maintenance of the Village's World Wide Web site.
- Initiated and led process of implementing Google Apps as the Village's electronic mail service provider, thereby providing greater functionality at a lower cost.
- Initiated the adoption of an administrative policies and procedures manual.
- Initiated, coordinated, and participated in strategic planning activities.
- Managed and coordinated the maintenance of the Village's information technology (IT) infrastructure and telephone system.
- Managed the Village's cable television government access channel.
- Oversaw the management of two residential properties owned by the Village for the purpose of future expansion of a fire station, but which was rented out to tenants until expansion occurred.
- Performed community, intergovernmental, and media relations activities.
- Prepared a successfully-funded competitive grant application for a grant to replace the windows at Village Hall with energy efficient windows. Administered the grant upon its being awarded.
- Prepared and distributed meeting agendas and meeting packets for meetings of the Board of Trustees.
- Provided general administrative assistance and support to the Village President and Board of Trustees.
- Responsible for the administration and oversight of the Village's cable television, electric, natural gas, and telephone franchise
  agreements. Assisted in the negotiation of the Village's cable television, electric, and natural gas franchise agreements.
- Responsible for the administration and oversight of the Village's residential waste collection and recycling contract.

#### **Budgeting And Financial Management**

- Improved the collection of delinquent utility accounts by revising policies and procedures regarding delinquent utility accounts.
- Initiated and implemented modifications to the budget document in order to improve readability and usability.
- · Initiated and led process to replace the Village's financial management software and related computer hardware.
- Managed and supervised the accounts payable, accounts receivable, and payroll functions.
- Managed and supervised utility billing, collections, and customer service operations for the Village's natural gas, storm water, waste water, and water utilities. Monthly billing to 6,000+ customers.
- Responsible for the preparation and administration of the annual operating and capital budgets, as well as the preparation of the
  annual appropriation ordinance and the tax levy ordinance.

# Candidate Introduction

#### **EDUCATION**

Master of Public Administration, Valdosta State University, Valdosta, GA Bachelor of Science in Political Science, Illinois State University, Normal, IL Associate in Arts and Science in Political Science, Illinois Central College, East Peoria, IL

#### **EXPERIENCE**

| City Administrator, City of Palos Heights, IL     | 2021 – Present |
|---|----------------|
| Village Administrator, Village of Forsyth, IL     | 2014 - 2021    |
| Interim City Administrator, City of La Grange, MO | 2013           |
| Business Manager, Village of Morton, IL           | 2000 - 2011    |
| City Administrator, City of West Peoria, IL       | 1994 - 2000    |

#### **BACKGROUND**

Palos Heights is a Chicago suburb with a population of slightly over 12,000 located in southern Cook County. Palos Heights is primarily a residential community, but has several commercial and office areas/corridors. The City is also home to Northwestern Medicine Palos Hospital, a 425-bed hospital that is part of the Northwestern University medical system, Trinity Christian College, a private college with a student population of approximately 1,200, as well as to a Metra commuter rail station.

Palos Heights has a total budget of over \$30 million and a General Fund budget of over \$13 million. The City employs approximately 70 full-time employees, of which I directly supervise 10.

The three most significant issues facing the City are:

- Governance Practices. The City generally has a series of over-complicated processes for
  considering and approving often routine matters, as well as a burdensome set of
  ordinances that are over-regulatory for both businesses and residents with no clear value.
  As a result, I have spent much of my time and effort conducting an analysis and
  assessment of the organization and identifying opportunities for increased effectiveness
  and efficiency of operations and service delivery.
- Capital Planning And Infrastructure. The City has ignored its infrastructure needs, particularly in regard to its water system, for a significant number of years. In addition, it has not had a comprehensive capital plan. This has resulted in aging and failing infrastructure and increasing capital needs that require a significant investment of money. I am currently working with Staff to develop a five-year capital plan, Staff has worked with consulting engineers to develop a ten-year water system improvement plan,

- and application has been made to obtain low-interest State loan funding for the work.
- Downtown Corridor. The City does not have a traditional downtown. Instead, it has a downtown corridor along a heavily traveled State route. Widening of this State route many years ago increased traffic flow and traffic speed and eliminated on-street parking. This, along with limited parking, obsolete platting, a retail strip layout, and changing shopping habits have greatly impacted the downtown corridor. Work is currently being done to develop a Business District to provide funding and legal mechanisms to help address this situation.

#### GENERAL MANAGEMENT STYLE AND EXPERIENCE

Professionally, I am looking for a local government management position which will provide me with an opportunity to utilize my more than twenty-five years of local government management experience in a dynamic, ethical, forward-thinking, innovative, and progressive organization that embraces and encourages innovation, change, and appropriate risk-taking and that is committed to continuous improvement, and which will provide me with an opportunity to confront a variety of new challenges and with opportunities for professional and personal growth and development. I am looking to continue my career in a community that is part of or close to a metropolitan area which allows for the quality of life unique to smaller communities along with the cultural, entertainment, and other amenities provided by a metropolitan area. I believe that this position would provide such an opportunity.

Generally speaking, my management style is to not micromanage, as my role is to manage the organization, not each individual department or employee. Instead, I try to lay out the project or task, set parameters and deadlines, and check in periodically. I believe that you need to give people room to grow, including occasionally making mistakes. At the same time, you need to keep the risks within acceptable limits, so that if a problem develops, you can deal with it before it gets out of hand. I also believe that it's important to make clear to employees that you expect them to come to you with a problem before it gets out of control and that you're available to them if they need input or are dealing with something that they don't understand. I also expect staff to take ownership of issues and to be accountable for their actions and for results. In addition, I offer a commitment to conservative fiscal management and to effective, efficient, high-quality service delivery, as well as a management philosophy emphasizing communication, consensus-building, openness, and teamwork. I am also a dedicated and hardworking individual who continually strives for the highest level of achievement, ethics, and professional conduct and who is committed to assisting the governing body set strategic priorities and achieve its desired goals and objectives.

I believe that my staff would say that I do not micromanage them, that I involve them in decision-making to the extent possible, that I'm ethical, that I'm fair, that I keep them informed, and that I respect them as employees and as people.

#### DAVID STROHL

I believe that the elected officials I have served would say that I'm knowledgeable, that I'm politically astute while being apolitical, that I'm thorough, and that I keep them informed (No surprises).

I believe that my strengths include the following:

- 1. My ability to place myself in other people's shoes and to see things from their perspective, be they elected or appointed officials, staff members, or citizens, and to attempt to resolve issues within that framework.
- 2. My ability to think strategically and see the big picture.
- 3. My commitment to customer service, to professional management, and to public service in general.
- 4. My management style, with an emphasis on communication, consensus building, cooperation, and teamwork. I believe that we all (elected and appointed officials, staff, and citizens) are on the same team and should work within that framework.
- 5. My openness to new ideas and new methods of doing things.

#### I believe that my weaknesses are:

- 1. That I am a bit of a perfectionist. I take a great deal of pride in my work and am committed to producing the highest-quality results that I can. However, I know that it is not always possible or practical to do perfect work. Sometimes you have to decide what is important and ignore the rest in order to be productive.
- 2. That I have a tendency to take on too much myself. Having come from a background of little or no staff and having to do so much on my own, I sometimes forget that others can or should take on certain projects and/or tasks. That said, I don't micromanage people once I give them an assignment or task, I just have to step back and realize that I can't and shouldn't do everything.

I believe that the best way to measure performance and determine if Staff and I are meeting the organization's goals is by the governing body, key staff members, and myself developing a detailed strategic plan that outlines specific objectives to achieve goals, with clear action steps, responsible parties, and time frames so that attainment of objectives can be clearly understood by all.

I believe that my biggest achievement or success was my role as Chair of the Downtown Development Action Team of the Morton Economic Development Council, leading the effort to create a Business District to facilitate and provide funding for community and economic development and redevelopment activities within the Business District. A 0.25% sales tax was imposed within the Business District, which encompasses most of the retail and commercial businesses in the Village, to provide funding for community and economic development and redevelopment activities within the District. The Business District and the funding that it provides will impact the development and redevelopment of the Downtown and other retail and

commercial areas of the Village for years to come and will have a long-term impact on the community.

I believe that the biggest failure or mistake of my career is my inability to effectuate much significant change in my current position. I see a number of things that I believe are in need of change and improvement, based on my professional experience and the input of Staff, but there unfortunately is an organizational culture of not being open to change and a lack of strategic thinking. This has led to significant frustration among Staff, including myself.

I have been fortunate enough to have had to fire only one employee in my career. This employee had performance issues and problems with getting along with her coworkers. I tried to handle this informally at first, trying to make her aware of the issues that had been brought to my attention and coaching and mentoring her to correct the issues. However, these efforts weren't successful, so I had to develop a formal performance improvement plan outlining what she needed to do and a time frame for achievement. Unfortunately, she did not meet those goals and her employment was terminated. It was unfortunate, but the right thing to do for the organization.

Based on my initial review of the information available to me, I believe that the immediate challenges facing the City of Belle Isle include:

- Limited opportunities for growth and new development given the City's surrounding area and issues with the County. Redevelopment of existing properties and in-fill development of any vacant properties may be the best options to increase the property tax base.
- A lack of space in City facilities and limited opportunities to relocate. Use of eminent domain authority may be necessary to address the lack of available properties. Use of an existing commercial or office property or other non-traditional location may also be an option.
- The City's location in the Orlando metropolitan area, requiring it to develop and maintain effective relationships with other units of government in the area, as well as the impacts to the City from persons and activities that spill over to the City from other areas.

My first six months in Belle Isle will focus on gathering information about the community and the organization. This information gathering will be performed through meeting with appropriate people within the organization, the community, and the region (including meeting individually with the chief elected official, members of the governing body, any other elected officials, appointed officials, the chairs of appointed boards and commissions, members of the administrative staff, department heads, the chair or president and the director of the economic development organization) and through reading appropriate documents. The goal of this information gathering will be to learn about the community, the organization, and the strengths, weaknesses, opportunities, and challenges of the community and the organization, to analyze the issues facing the community and the organization, and to develop an action plan to address those issues.

#### DAVID STROHL

My experience with working with the news media has generally been interacting with the print media, although that has lessened over the years with the changes taking place in local print journalism. My practice has been to try to be as open and honest as possible and sharing as much information as possible in order for the public to have as accurate an understanding of issues as possible. I don't believe that there is anything in my background that would cause anyone any embarrassment.

I view social media as one of many communication channels that can and should be used to keep residents up to date.

I do not anticipate anyone contacting the City with negative information about me.

In my spare time, I enjoy cooking, traveling, and spending time with my family.

#### SIX ADJECTIVES OR PHRASES I WOULD USE TO DESCRIBE MYSELF

- Knowledgeable
- Accessible
- Highly Ethical
- Proactive
- A strategic person that thinks about the big picture
- A problem-solver that takes a common-sense, practical approach

#### REASON FOR DEPARTING CURRENT POSITION

My current organization, a strong mayor-council form of government, does not, in my opinion, value the role of the City Administrator position. As a result, I do not believe that my skills and experience are being appropriately utilized, nor do I believe that the issues and challenges facing the community and the organization are being addressed. There is a level of frustration among Staff, including myself, in our inability to effectuate significant organizational change.

#### CURRENT / MOST RECENT SALARY

My current salary is \$158,002.00 per year.

d.

# CB&A Background Checks

# **Background Check Summary for DAVID ALLEN STROHL**

#### **Criminal Records Checks:**

Nationwide Criminal Records Search No Records Found

County

Cook County, IL
Macon County, IL
No Records Found
No Records Found
No Records Found
Tazewell County, IL
No Records Found
No Records Found

State

Illinois No Records Found Missouri No Records Found

#### **Civil Records Checks:**

County

Cook County, IL
Macon County, IL
No Records Found
No Records Found
No Records Found
Tazewell County, IL
No Records Found
No Records Found

Federal

Illinois No Records Found Missouri No Records Found

**Motor Vehicle** 

Illinois No Records Found

**Credit** Excellent

Personal Bankruptcy No Records Found

Sex Offender Registry Not Listed

**Education** Confirmed

**Employment** Confirmed, except for the City of

Palos Heights, IL (07/2021 – Present)

307

Social Media Nothing of Concern Found

Page 16 of 80

d.

# **Section 10**

# **Background Check Summary for DAVID ALLEN STROHL**

Under the Fair Credit Reporting Act, 15 U.S.C. 1681-1681Y, credit and bankruptcy information are very sensitive and should not be used be in the consideration of hiring. The information is included for each candidate because we do not want you to be surprised if third parties raise what they consider to be a concern. Also, some states have limited the reporting to seven years, so any records older than that will not be available in those states. In addition, motor vehicle reports are limited to three to seven years, depending on the state.

# **Background Check Summary for DAVID ALLEN STROHL**

#### **Personal Disclosure**

| Personal Disclosure Questionnaire    |   |   |   |                                    |   |  |
|--------------------------------------|---|---|---|------------------------------------|---|--|
| Name                                 | of Applicant:   | Da                                      | vid A. St   | roh(                               |   |  |
| backgr<br>elimin<br>and the<br>compe | ound. Please<br>ated from all fo<br>at charges do no<br>ensation. The | answer<br>urther s<br>ot mear<br>bottom | them honestly.<br>earches conducte<br>you were guilty | Cutting<br>ed by this<br>. We also | be able to make full disclosure to our client concerning you corners or misrepresenting your past will result in you being firm. We understand that frivolous charges are sometimes made understand that you may have been wronged and needed to seel be certain that our client is fully informed. If you have any |  |
| <u>Please</u>                        | explain any y   | es answ                                 | ers on a separat                                      | e sheet of                         | paper.  |  |
| 1.                                   | Have you eve  | r been                                  | charged or convic                                     | cted of a f                        | elony?  |  |
|                                      | Yes   |   | No  | $ \mathbf{A} $                     |   |  |
| 2.                                   | Have you eve  | r been a                                | accused of or hav                                     | e been in                          | volved in a domestic violence or abuse incident?  |  |
|                                      | Yes   |   | No  |                                    |   |  |
| 3.                                   | Have you eve  | r decla                                 | red bankruptcy or                                     | been an                            | owner in a business that did so?  |  |
|                                      | Yes   |   | No  | ✓                                  |   |  |
| 4.                                   | Have you eve<br>lawsuit?  | r been                                  | the subject of a c                                    | ivil rights                        | violation complaint that was investigated or resulted in a  |  |
|                                      | Yes   |   | No  |                                    |   |  |
| 5.                                   | Have you eve  | r been                                  | the subject of a se                                   | exual hara                         | assment complaint that was investigated or resulted in a lawsuit?   |  |
|                                      | Yes   |   | No  | <b>&gt;</b> /                      |   |  |
| 6.                                   | Have you eve  | r been                                  | charged with driv                                     | ing while                          | intoxicated?  |  |
|                                      | Yes   |   | No  |                                    |   |  |
| 7.                                   | Have you eve  | er sued a                               | a current or form                                     | er employ                          | er?   |  |
|                                      | Yes   |   | No  |                                    |   |  |
| 8.                                   |   |   | l your social med<br>you have one.                    | ia accoun                          | ts (Facebook / Instagram / LinkedIn / Twitter, etc.) and your   |  |
| 9.                                   | Is there anyth  | ing else                                | in your backgro                                       | und that,                          | if made public, would cause you, our client or our firm   |  |

embarrassment if it came to light through the press or any other mechanism?

Yes □ No 🗵

10. Please provide a list of any lawsuits in which you are or have been a party either as plaintiff or defendant.

Not Applicable

Attested to: David A. Madd
Signature of Applicant

Please email this form via PDF DOCUMENT to Monique@cb-asso.com or via fax to (561) 621-5965 no later than 5:00 PM MST 05/15/2023.

d.

# CB&A Reference Notes

#### Dave Wendt - Trustee, Village of Forsyth, IL 217-412-2519

Mr. Wendt has known Mr. Strohl since 2014. Mr. Wendt served on the Board of Trustees for the Village of Forsyth when Mr. Strohl took the position as Village Administrator. The Board consistently gave Mr. Strohl good reviews during his tenure in Forsyth.

Mr. Wendt appreciates the ideas Mr. Strohl brought from his past work in a larger community. While Forsyth has a population of less than 4,000, it borders the City of Decatur, which has a population of 80,000. Because of the Village's location at the intersection of an interstate and a major highway, 5,000 to 7,000 people visit every day, staying in its hotels, shopping at its mall, and dining at its restaurants. Mr. Strohl's experience helped Forsyth deal with these issues that resemble those of a large municipality.

Mr. Strohl thrives in a bureaucratic environment. He is thorough, organized, and able to anticipate future issues. He understands and plans for the legal requirements of a project or procedure. For example, he proposed that Forsyth reduce the number of its liquor licenses to match the number of businesses that already had one. This enabled the Village to better control alcohol consumption in the community. If a new business arrived, it had to petition the Village not only to grant them a license but also to increase the number of licenses.

Mr. Strohl is a problem solver. When the Public Works Director announced his retirement only a month in advance, it created a major challenge. To meet EPA regulations, the Village needed to hire a new Director with a class A water license to run its water treatment plant before the retirement took effect. Mr. Strohl proposed that they hire a temporary firm with a license to manage the plant until they could hire a new Director. He identified two or three firms for the Board to choose from. The firm they hired did excellent work until the Board chose a new Director. The Village maintains an agreement with the firm to provide temporary services in the future should the need arise.

Mr. Strohl also demonstrated skill during the hiring process. He provided the Board with valuable guidance throughout the process of hiring a new Public Works Director. The Director they hired has since done excellent work in Forsyth and still works there today.

Mr. Strohl advocates for change when it is appropriate. He proposed and implemented several improvements and modernizations in Forsyth. However, he understood that a small community can be resistant to change. He knew when to back off or leave the matter up to the Trustees to decide.

Mr. Strohl effectively communicates with members of the public in group settings. His presentations at community meetings are well organized. While he takes phone calls from residents at times, he prefers to delegate customer service interactions to members of his staff. He then works to address residents' concerns behind the scenes, by finding answers to their questions, making plans, and scheduling hearings.

Mr. Strohl attends all the required community meetings. He participates in Board meetings and planning and zoning meetings. However, he often declines to participate in community events, such as parades and festivals. He prefers to delegate public appearances to members of his staff.

Mr. Strohl is an effective communicator. He keeps elected officials informed through a weekly update email. In the Village of Forsyth, he reorganized Board meetings to make them more efficient. The new meeting structure facilitated better communication, which helped the Board plan ahead and avoid emergency situations. He accomplishes tasks in a timely manner. If he or his staff cannot meet a deadline, he informs the Board and explains the reasons for the delay.

Mr. Strohl maintains his composure during stressful situations. Mr. Wendt has never seen him lose his temper. When Mr. Strohl accepted the position of Village Administrator in Forsyth, he encountered a tense atmosphere caused by disagreements between his predecessor and the Board. His calm and steady personality helped him successfully navigate the situation and restore order to the community. Throughout his tenure, Mr. Strohl helped avoid tense encounters with residents by informing the Board of potential conflicts ahead of time.

Mr. Wendt has no knowledge of any significant controversy involving Mr. Strohl. Nothing in Mr. Strohl's background or conduct would concern a citizen or an employer.

Mr. Wendt was satisfied with Mr. Strohl's work for the Village of Forsyth. He was sorry to see Mr. Strohl leave, but he understood he was ready for a new challenge. He recommends Mr. Strohl for the position.

#### Words or phrases used to describe David Strohl:

- Detail oriented,
- Organized,
- Good planner,
- Keeps people informed, and
- Experienced.

**Strengths:** A skilled bureaucrat and planner, good financial skills.

**Weaknesses:** Not interested in being the public face of the Village.

#### Bob Gruenewald - Trustee, Village of Forsyth, IL 217-520-5489

Mr. Gruenewald has known Mr. Strohl since 2017. Mr. Gruenewald served as a Trustee for the Village of Forsyth while Mr. Strohl was the Village Administrator. The two maintained a positive working relationship.

Mr. Strohl is knowledgeable about local government. If there is something he does not know, he thoroughly researches the matter. His understanding of economic development was an asset to the Village of Forsyth when planning a new community center and sports park. He reached out to Administrators and Mayors of neighboring communities for additional guidance and assistance. He made helpful proposals based on research.

Mr. Strohl supports the vision of the Board of Trustees. In Forsyth, he and his staff accomplished many of the items on the Trustees' 5-year plan. He places a high priority on keeping elected officials informed. He sends emails on a biweekly basis before Board meetings detailing his recent activities and upcoming issues and events. He reaches out to Trustees whenever a new issue arises.

Mr. Strohl attends community meetings. He is present during Board meetings and represents the municipality during Economic Development Council meetings. He makes clear presentations during these meetings. During the planning stages of the new community center and sports park, Mr. Strohl actively participated in public meetings to inform residents and take input.

When interacting with disgruntled members of the public, Mr. Strohl maintains his composure. He listens and calms them down. He helps them find a peaceful and satisfactory resolution to their problems.

Mr. Strohl serves customers in innovative ways. The Village of Forsyth runs its own water treatment plant and must therefore collect payments and monitor water usage. At the beginning of Mr. Strohl's tenure, the Village monitored usage by sending personnel to manually read water meters outside residences. Mr. Strohl advocated for the modernization of the system. He led the effort to install an automated monitoring system and helped set up an online payment system.

Mr. Strohl makes excellent hiring decisions. He works well with a team when conducting interviews. He has a solid approach to interviewing candidates and asks compelling questions. During the process of hiring a new Public Works Director for the Village of Forsyth, Mr. Strohl identified a promising candidate and recommended him to the Board of Trustees. The Board agreed with his recommendation but had difficulty determining what salary the candidate would receive. Mr. Strohl's persistence helped the Board reach a consensus and complete the hiring process. They hired the candidate, who still works for the Village today.

Mr. Strohl is a problem solver. When the Board of Trustees could not decide where the community center would be located, he held a meeting in which he detailed the pros and cons of various locations. He collected input from the Board members. His efforts helped the Board agree upon a location.

Mr. Strohl has a low-key personality, but it does not interfere with his efficacy as a manager. He worked well with business leaders in Forsyth, especially the owners of Hickory Point Mall.

Mr. Strohl is experienced in municipal finances. He is conservative with funds and ensures the municipality has a balanced budget. He is disciplined when spending funds and authorizing expenditures. He keeps the taxpayers in mind when managing the budget.

Mr. Strohl strives to accomplish tasks in a timely manner. Though government often moves slowly, he meets expected time frames whenever he can. He does not rush a project if it needs more time and attention, but he stays on task and tries to keep making progress.

Mr. Strohl avoids stress by planning ahead and making wise decisions. If a conflict arises with members of the Board or with residents during public meetings, he does not become upset. He maintains order and discusses the matter calmly.

Mr. Gruenewald is not aware of any controversy Mr. Strohl has been involved in. Nothing in his conduct or past would concern a citizen or an employer. Mr. Strohl will make an effective City or County Manager.

#### Words or phrases used to describe David Strohl:

- Fiscally responsible,
- Focused on initiatives,
- Good manager,
- Resourceful,
- Understands government rules and regulations, and
- Maintains an appropriate relationship with the Board.

**Strengths:** Listens to people, looks for solutions to their problems.

**Weaknesses:** Lived in another community, so he was less available on weekends. Was not as engaged in the community as he could have been. Avoids public appearances.

#### Kerry Denison – Former Trustee, Village of Forsyth, IL 217-330-0795

Mr. Denison has known Mr. Strohl since 2018. He served as a member of the Board of Trustees for the Village of Forsyth during Mr. Strohl's tenure as the Village Administrator. Mr. Denison and his fellow Trustees were pleased with Mr. Strohl's performance and gave him a substantial raise.

Mr. Strohl is an excellent Administrator. He is businesslike, task oriented, and committed to his work. He is experienced and knowledgeable in local government. If he does not know something, he researches it and learns quickly. He is a team player. He is a good listener and easy to get along with. He takes input from others and tries to build consensus among his peers.

Mr. Strohl has great financial skills. Forsyth has a small population but a substantial economy. As a suburb of a larger city, it has a great deal of restaurants and shops. Mr. Strohl managed Forsyth's substantial budget with skill.

Mr. Strohl is thoughtful about the consequences of his actions. He understands that rumors of change can have a negative impact on the community. For example, when a new business approached him about building in Forsyth, Mr. Strohl kept the matter quiet until building permits were obtained.

Mr. Strohl is a good manager. He keeps his employees on task. He encourages his staff to share their ideas. He makes good hiring decisions. He successfully hired a new Public Works Director and staff for the Economic Development department. The employees he hired have done good work for the Village.

Mr. Strohl is flexible and does not fear change. One major task he oversaw in Forsyth was reinvigorating its shopping mall. He researched malls throughout the country and identified successful methods others have used. He proposed repurposing mall space for other uses such as a skating rink or a chapel. He proactively worked with the mall's owners to suggest and implement innovative changes.

Mr. Strohl strives to establish positive relationships with neighboring municipalities. He worked with the City of Decatur's Council on many occasions. He also maintained communication with the nearby Village of Mount Zion, a community of a similar size with similar challenges.

Mr. Strohl had many opportunities to interact with Forsyth's residents on an individual basis. In a small community, residents often reach out to the municipality with their concerns and ideas. Mr. Strohl focused on serving them as valued customers. Mr. Denison has heard no complaints about Mr. Strohl's interactions with members of the public.

Mr. Strohl keeps the Trustees informed. He holds a meeting with them every two weeks to give updates and discuss plans, problems, and financial matters. He manages the stress of his position well. He does not display extremes of emotion. He is flexible and willing to try new things.

During his time as the Village Administrator, Mr. Strohl chose not to live in Forsyth. His permanent residence was located about 70 miles away. He rented an apartment in the Village, where he stayed during the week, and he returned home on weekends. This annoyed some of the Board members, who felt he should live within the Village. Though the issue was somewhat controversial, the Board eventually accepted Mr. Strohl's decision because he effectively fulfilled his responsibilities. Mr. Denison is not aware of anything in Mr. Strohl's background or conduct that would concern a resident or an employer.

Mr. Strohl will make an excellent City or County Manager. Any organization that hires him will be pleased with his performance.

#### Words or phrases used to describe David Strohl:

- Conscientious,
- Task oriented,
- Thoughtful,
- Consensus builder, and
- Hard worker.

**Strengths:** Purposeful, thoughtful, builds consensus.

Weaknesses: Too unemotional at times.

#### Jim Peck – Village President, Village of Forsyth, IL 217-433-5700

Mr. Peck has known Mr. Strohl since 2014. Mr. Peck was a Trustee when Mr. Strohl became the Village Administrator in Forsyth. Mr. Peck later became the Village President a few months before Mr. Strohl's departure. He and his colleagues were very pleased with Mr. Strohl's performance.

Mr. Strohl interacts well with his employees. He keeps them on task. He delegates to his staff, preferring to lead from behind the scenes. When hiring personnel, he makes wise choices. In Forsyth, his hiring decisions resulted in a low employee turnover rate.

Mr. Strohl is a problem solver. Forsyth is a small town with few challenges. However, the Village borders a larger community whose challenges sometimes affect Forsyth. Mr. Strohl effectively manages these issues. He embraces innovation. He supports changes proposed by the Board of Trustees and rallies his staff around their vision. He has also proposed many of his own ideas which the Board has approved.

Mr. Strohl communicates well with the Board of Trustees. He keeps them informed through a weekly memo detailing his recent work, his ideas, and upcoming events. He reaches out to them whenever the need arises through emails and phone calls.

Mr. Strohl attends his required meetings. In the Village of Forsyth, he was present at both Board meetings and Planning Commission meetings. He helped prepare for the meetings by creating an agenda under the direction of the Mayor.

Mr. Strohl is experienced in interacting with members of the public. While he functions best in a group setting, he also communicates well with individuals.

Mr. Strohl manages the stress of his position by being prepared. He meets timelines and anticipates challenges. On occasion, he helped avoid conflicts by informing the Board of a resident's concern so they could prepare a response.

Mr. Peck has no knowledge of Mr. Strohl's involvement in any controversy. There is nothing in his background or conduct that would prevent him from honorable service in local government.

Mr. Strohl will make a great City or County Manager. Mr. Peck would hire him again if he needed a new Administrator. He recommends Mr. Strohl for the position.

#### Words or phrases used to describe David Strohl:

- Honest,
- Hard working,
- Prompt,
- Sincere,
- Friendly, and
- Straightforward.

**Strengths:** Fiscally responsible.

Weaknesses: Stayed in the office most of the time, did not connect with residents enough.

#### Jeff Jurgens – Former Village Attorney, Village of Forsyth, IL 309-846-8936

Mr. Jurgens has known Mr. Strohl since 2014. Mr. Jurgens worked as the Village Attorney during the time Mr. Strohl served as the Village Administrator in Forsyth, Illinois. The previous Administrator had a tumultuous tenure. When Mr. Strohl accepted the position, he succeeded in resolving a difficult situation. The Board of Trustees was very pleased with his performance.

While Mr. Strohl is open to change, his primary task in the Village of Forsyth was to correct previous mistakes and help the organization run more smoothly. He understood it was not appropriate to push new ideas at the time.

Mr. Strohl makes good hiring decisions. The people he hired in Forsyth were a good fit for the organization. He has experience in interacting with citizens. He makes good presentations in community meetings, and he takes time to speak with individuals as well. He continually strives to address their concerns.

Mr. Strohl keeps elected officials informed of what is happening in his area of government. He sends out a weekly email to keep them up to date. He attends all the meetings required of him.

During his tenure in Forsyth, however, he lived outside of the Village, which limited his capacity to attend additional meetings and community events.

Mr. Strohl has a strong understanding of municipal finance. He helps the organization run within its budget. Forsyth's Board of Trustees was pleased with the firm control he had of the Villages' financial situation.

Mr. Strohl is a problem solver. In the Village of Forsyth, he primarily encountered zoning issues and resident complaints. He spends his time working to improve the issues brought forward by citizens and Trustees.

Mr. Strohl approaches tense situations in a calm and collected manner. Under pressure, he does not rush into making a decision. He maintains his composure and approaches the matter in a thoughtful way.

Mr. Strohl has not been involved in any controversies since Mr. Jurgens has known him. There is nothing in Mr. Strohl's conduct or background that would concern a citizen or an employer. Mr. Jurgens would hire Mr. Strohl if he could. Mr. Strohl will be a great City or County Manager.

#### Words or phrases used to describe David Strohl:

- Calm.
- Thoughtful,
- Strong,
- Leader,
- Friendly, and
- Articulate.

**Strengths:** Calm, collected, thoughtful.

Weaknesses: None identified.

#### Kim Taylor – Administrative Assistant, Village of Forsyth, IL 217-972-0679

Ms. Taylor has known Mr. Strohl since 2015. She worked for him as an Administrative Assistant during his time as Administrator in the Village of Forsyth. Mr. Strohl is a great administrator. He is thorough, experienced, prompt, and friendly. Ms. Taylor feels comfortable asking him for assistance or his opinion, even though he has since left his position in Forsyth.

Mr. Strohl fosters a team environment. He makes everyone feel important, from the secretaries to the Village President. He invites his staff to give input, encouraging them to approach him not with problems but ideas to overcome challenges. Then they discuss the issue and work on it

together. When the need arises to hire personnel, Mr. Strohl thoroughly researches candidates. He uses his experience to help him choose the best candidate.

Mr. Strohl puts a high priority on communication. He keeps his staff and colleagues informed of what is happening in the organization. He holds regular staff meetings, especially after community meetings, to ensure staff members have the most current information.

Mr. Strohl attends community meetings and events. If he has a conflict that prevents him from attending, he informs his colleagues in advance.

Mr. Strohl has experience in dealing with members of the public. He interacts well with citizens. He uses a customer service approach when listening to their concerns. Only once during his seven years in Forsyth did Ms. Taylor sense that he was frustrated with a customer. However, he maintained his composure and asked for help instead of displaying negative emotions.

Mr. Strohl is a problem-solver. When the Village experienced trouble processing water bills, Mr. Strohl proposed choosing a third party to handle the billing. The decision resulted in a much smoother experience for the Village and its residents. He has great financial abilities. He was able to assist the Village Treasurer with her responsibilities when needed.

To Ms. Taylor's knowledge, Mr. Strohl has not been involved in any controversial situation. When he took the position in Forsyth, he successfully managed unrest in the organization created by his predecessor. He gained the favor of the Trustees and restored their trust in the Administration. Nothing in his background or conduct would concern an employer or citizen. Ms. Taylor recommends him for any position in local government.

#### Words or phrases used to describe David Strohl:

- Diligent,
- Thoughtful,
- Responsible,
- Thorough,
- Hard-working, and
- Tactful.

**Strengths:** Communication, organization, teamwork.

**Weaknesses:** Dislikes interacting with the press.

#### Marilyn Johnson - Trustee, Village of Forsyth, IL 217-433-8270

Ms. Johnson has known Mr. Strohl since 2014, while he served as Village Administrator for Forsyth. At the time, Ms. Johnson was the Village President. Mr. Strohl was the best Administrator she has worked with during her many years of service in Forsyth.

Mr. Strohl is meticulous. He researches issues thoroughly before making decisions. Once he commits to a plan, he follows through and completes the project. He is innovative when the need arises, but he does not push for unnecessary changes. He understands the benefits of maintaining procedures that work well.

Mr. Strohl prefers to lead from behind the scenes. Though he does not enjoy being in the spotlight, he is skilled at personnel management and makes great hiring decisions. On one occasion, he helped the Public Works Director solve some problems involving the staff in that department.

While he does not enjoy socializing during community events, Mr. Strohl has experience interacting with members of the public. He is effective in his interactions, whether in a group setting or when meeting with a citizen individually.

Mr. Strohl has many other fine qualities that make him an excellent candidate. He attends community meetings whenever necessary. He is customer service oriented. He keeps elected officials informed. He has excellent financial skills and ensures the Village follows the budget. He completes tasks in a timely manner. During stressful situations, he maintains his composure and approaches problems in a quiet, thoughtful manner.

Ms. Johnson has no knowledge of Mr. Strohl's involvement in any controversy. Nothing in his background or conduct would concern a citizen or an employer. He will make an excellent City or County Manager.

#### Words or phrases used to describe David Strohl:

- Very good administrator,
- Works well with a variety of people,
- Prompt,
- Friendly, and
- Has a positive attitude.

**Strengths:** Meticulous, stays informed, follows through.

Weaknesses: Could communicate better.

### Rhonda Stewart – Village Treasurer, Village of Forsyth, IL 217-201-1943

Ms. Stewart has known Mr. Strohl since 2014. She worked for him as the Village Treasurer during the time he served as Village Administrator. Ms. Stewart characterizes Mr. Strohl's job performance as very good.

Mr. Strohl attends community meetings, including meetings with the Board of Trustees. During these meetings, he spends time answering questions from residents. He tries to address their concerns.

As a manager, Mr. Strohl leads from behind the scenes. He gets involved when needed, but he spends most of his time doing productive work in the office. The Board of Trustees approves of his management style. When hiring personnel, Mr. Strohl makes good decisions. He manages stress well. He controls his temper during tense situations.

Mr. Strohl has excellent financial skills. Ms. Stewart felt comfortable asking him for assistance with the budget and appreciated his experience with municipal finances. He always kept her informed about financial concerns and potential changes to the budget. In the Village of Forsyth, Mr. Strohl used his financial expertise in innovative ways. For example, he changed the format of the budget book and expanded it, making it more user friendly. He also led a team in the effort to set up an online payment system.

Ms. Stewart is not aware of Mr. Strohl's involvement in any controversy. His background and conduct are appropriate for a member of local government. Ms. Stewart recommends him for the position.

#### Words or phrases used to describe David Strohl:

- Organized,
- Sensible,
- Honest,
- Passionate, and
- Very Comprehensive.

**Strengths:** Excellent financial skills, accomplishes tasks on time.

**Weaknesses:** A perfectionist who overthinks things at times.

**Prepared by:** Claire Argyle

Colin Baenziger & Associates

d.

# CB&A Internet Research

#### d.

#### Internet – Newspaper Archives Searches David A. Strohl

(Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **David A. Strohl** is listed below.]

https://southcooknews.com/stories/634504468-city-of-palos-heights-city-council-met-aug-2

South Cook News November 7, 2022

#### City of Palos Heights City Council met Aug. 2

Author: Kristine Gonzales-Abella

• The Mayor introduced a motion to approve the appointment of City Administrator **David Strohl** as the Budget Officer. Alderman Key moved to approve the appointment seconded by Alderman McGovern. On roll call, the motion to approve the appointment was:

Ayes: (6) Basso, Clifford, Key, Lewandowski, McGovern, McGrogan

Nays: (0) None

With six (6) affirmative votes the motion carried.

#### Internet – Newspaper Archives Searches David A. Strohl

(Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **David A. Strohl** is listed below.]

https://southcooknews.com/stories/628568615-city-of-palos-heights-city-council-met-july-5

South Cook News July 18, 2022

#### City of Palos Heights City Council met July 5

Author: Philip Gonzales

9. Motion to approve a Resolution appointing a delegate (**David Strohl**, City Administrator) and alternate delegate (Charlotte Moore, Office Manager) to the Intergovernmental Risk Management Agency (IRMA).

# Internet – Newspaper Archives Searches David A. Strohl

(Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **David A. Strohl** is listed below.]

https://icma.org/articles/member-news/members-recommended-receive-credential-january-2022 December 1, 2021

Members Recommended to Receive Credential in January 2022 These ICMA members have been recommended by the Credentialing Advisory Board to receive ICMA Credentialed Manager or Candidate status in January 2022.

Author: Jenese Jackson

The ICMA Credentialed Manager (ICMA-CM) designation has become widely respected, frequently requested in recruitment of positions, and cited in positive media coverage of public stewardship. Congratulations to the following members, who have been recommended by the Credentialing Advisory Board to receive ICMA Credentialed Manager or Candidate status in January 2022.

ICMA Credentialed Managers are professional local government managers qualified by a combination of education and experience, adherence to high standards of integrity, and an assessed commitment to lifelong learning and professional development. Objections must be filed in writing to the ICMA executive director (via credentialing@icma.org) and received by December 31, 2021.

# **ICMA Credentialed Managers**

David Strohl, Palos Heights, IL

# **Section 10**

# Internet – Newspaper Archives Searches David A. Strohl

(Articles are in reverse chronological order)

https://herald-review.com/news/local/mount-zion-splash-pad-among-macon-county-projects-to-get-state-grant-money/article\_271a7a89-ef93-5f8c-af14-78b939c6ed2c.html

Herald & Review February 5, 2019

### Mount Zion splash pad among Macon County projects to get state grant money

Author: Unknown

Three Macon County parks projects, including a new splash pad in Mount Zion, will be funded by state grants announced Tuesday. Gov. J.B. Pritzker's office announced the three projects, totaling \$758,400 in funding, as part of a list of 89 across Illinois. The grants, totaling \$28.9 million statewide, will provide up to half of the money for each project, to be combined with local matching funds.

The Macon County projects are:

\$309,200 to the village of Forsyth to acquire land for a sports park;

\$75,000 to the Macon County Conservation District for cattail pond improvements at the Rock Springs Conservation Area;

\$374,200 to Mount Zion for the Fletcher Park splash pad development.

The Rock Springs and Mount Zion projects will be paid for through the state's Open Space Land Acquisition and Development (OSLAD) program, which receives its funding from a percentage of the state's real estate transfer tax. Money for the Forsyth project will come from the federal Land and Water Conservation Fund.

As of Tuesday morning, Mount Zion has raised about \$65,000 for the project, said village administrator Julie Miller. The grant from the state will require a 50/50 match, so Miller said the coming months will be used to raise the additional \$310,000 necessary to make the splash pad a reality. "Obviously we have a ways to go, so we are going to have more fundraising efforts in the coming year to get us to that \$374,200 level," she said.

Once the village receives the grant money, which is expected to be this spring, they will have 24 months to build the splash pad. Overall construction time is expected to be about one year, Miller said. Those interested in contributing to help fund the splash pad can contact the Community Foundation of Macon County at (217) 429-3000.

Forsyth village administrator **David Strohl** said the village applied for the state grant with the idea of developing a sports park and community center. The 70-acre site would be off of County Highway 20. Although plans are still being processed, he said, the project will begin in phases once the village board has the money in hand. "But the grant was just awarded last week," **Strohl** said.

# Internet – Newspaper Archives Searches David A. Strohl

(Articles are in reverse chronological order)

Herald & Review (IL) April 19, 2017

#### **Forsyth Moves to Create TIF District**

Author: Allison Petty

The village of Forsyth is moving to establish a tax increment financing district to spur residential and commercial development. The village's board of trustees voted Monday to enter into a professional services agreement with TIF Illinois of Bloomington to study the proposed area and determine which parcels are eligible, the village said in a news release. The purpose of the district would be to spur residential development in the Prairie Winds area and commercial development along the U.S. 51 corridor and other parts of the village.

Village Administrator **David Strohl** described the move as an investment in the village's economic future. "Hope is not an effective strategy for economic development but it's what we've been relying on for too many years," **Strohl** said. "Using a mechanism like TIF is what we need to ensure Forsyth remains competitive and an attractive place for businesses and residents to locate to for decades to come."

TIF districts were established by state law as a tool that local governments can use to create economic growth in certain areas. Here's how it works: When a district is established, the property value at the time is considered the base amount. The city, school district and other taxing bodies continue to collect property taxes on this amount.

If the property value rises because of new developments or improvements, the property owner pays higher taxes. However, those proceeds — the taxes paid on the difference, or "increment" — are put into a special fund that can be used either to reimburse a developer for certain costs or to invest in infrastructure for the area, as the city of Decatur did for its downtown several years ago.

The area chosen for a TIF must meet certain criteria laid out in state law, which is generally meant to identify blighted or underperforming areas. The maximum life of a TIF district is 23 years, although municipalities can choose to end them before then. The village said the district could be established as early as August. The village of Forsyth does not have any active TIF districts. The city of Decatur has seven, according to its most recent report to the Illinois Comptroller's Office. This story will be updated.

# Internet – Newspaper Archives Searches David A. Strohl

(Articles are in reverse chronological order)

Herald & Review (IL) February 18, 2016

Gas Tax Talk Visits Mt. Zion – Village is Interested in Price Response at its Gas Stations Author: Ryan Voyles

The recently approved gas tax in Decatur has at least one village considering whether to follow suit. Mount Zion Village Administrator Julie Miller told the board of trustees during its Tuesday night meeting that they would take a "wait and see" approach when it came to its own gas tax. "We want to see what these gas stations do here in response to the vote in Decatur," she said.

That vote was the one taken Tuesday night when the Decatur City Council approved of a new gas tax during its meeting. The tax is 5 cents per gallon of unleaded gasoline and 1 cent per gallon on diesel fuel and will take effect April 1. Decatur city officials said each penny is expected to generate \$250,000 to \$300,000 in revenue.

When the cost of gas does rise in Decatur, Miller said she would not be surprised to see gas stations in surrounding communities such Mount Zion raise their prices to match those in Decatur, with station owners netting the additional revenue. She noted similar situations occurred in neighboring towns and villages when Champaign passed a gas tax in 2012 and Bloomington 2014.

One thing that could put a damper in Mount Zion's plan is that gas taxes are one of the tools granted to home rule municipalities to increase local funds. The village is far below the minimum 25,000 population required to be considered home rule, and there are no plans to elect by referendum to become a home rule unit. Miller acknowledged this issue and said a legal opinion would be sought on whether the village can do anything in regard to a gas tax. Not every neighboring village is so quick to follow Decatur's lead on the matter.

**David Strohl**, village administrator from Forsyth, said there has been no discussion or consideration by village officials there in regard to a gas tax. Since there are just two gas stations in the village, **Strohl** said the impact of a gas tax on the village's revenue would be minimal. "We see no reason to look into it at this time," he said.

### Internet – Newspaper Archives Searches David A. Strohl

(Articles are in reverse chronological order)

Herald & Review (IL) January 20, 2016

#### **Forsyth Keeps Gaming Restrictions in Place**

Author: Chris Lusvardi

Video gaming will continue to be banned in Forsyth after the village board of trustees considered recent requests to change an ordinance in effect since 2012. The board decided during its meeting Monday not to further explore changing its ordinance that prohibits businesses from operating video gaming machines. The ordinance was needed after state law allowed for video gaming at certain types of businesses. "I see no reason to do away with the ban," trustee Jim Peck said.

Trustee Bob Gruenewald said allowing video gaming would not promote what he considers a widely-desired, family-friendly environment within Forsyth. Trustee Dave Wendt said the feedback he has received from residents is against allowing video gaming. Resident Leo Morland told the board it should keep the ban in place. "Gambling is a vice," Morland said. "I don't think the village is the right place for video gaming." Wendt would at least like to wait to see the outcome of a proposal to add a casino at the Decatur Conference Center and Hotel. That could determine whether smaller businesses could be successful, he said.

Village Administrator **David Strohl**, along with Mayor Marilyn Johnson, asked the board to consider the issue, saying the rise of video gaming at businesses in other communities has created interest in whether Forsyth would allow it. The board had considered the issue in 2012 as a possible way of raising revenue for the village. **Strohl** said the interest in adding video gaming appears to be coming mostly from smaller, independently-owned businesses rather than the chains that are most common in Forsyth.

While keeping the ban in place, trustees didn't shut the door completely on, at some point, reversing course. Trustee Kerstin Trachtenberg doesn't like gambling but isn't totally against allowing it. "If businesses are coming to us saying they're losing customers by not having it, that'd be worth considering," Trachtenberg said. "There hasn't been a big call for it from businesses." Trustee Larry Reed doesn't think the problems commonly linked to businesses with video gaming machines are as widespread as many believe. He said it wouldn't go against being family-friendly as it's not really an activity families do together.

Village Attorney Jeff Jurgens said the number of establishments with video gaming could be held in check by limiting the number of liquor licenses issued. "You don't want it everywhere you turn in the village," he said. Otherwise, Jurgens said the number of places eligible for video gaming would be hard to restrict if the village ordinance aligned with what state law allows.

### Internet – Newspaper Archives Searches David A. Strohl

(Articles are in reverse chronological order)

https://herald-review.com/news/local/forsyth-to-develop-disc-golf-course/article\_7da84902-409f-537c-816e-4a752c539599.html

Herald & Review April 27, 2015

#### Forsyth to develop disc golf course

Author: Chris Lusvardi

Development of a disc golf course for Forsyth Park is moving ahead. The Forsyth Board of Trustees approved a proposal last week for design services and the purchase of up to 18 disc golf baskets. "We could have one of the nicer courses," trustee Bob Gruenewald said. "It's an activity that is clearly growing in interest."

The board was approached last year about the possibility of adding a course at the park. Gruenewald looked into the idea and found it to be promising. Illinois has about 200 disc golf courses, including one at Nelson Park in Decatur, Gruenewald said.

The design services of Illinois Disc Golf in Rantoul would be worth \$1,500, Village Administrator **David Strohl** said. The board also agreed to spend up to \$9,000 to purchase baskets for the course.

Preliminary plans will change slightly, but Gruenewald said the concept for an 18-hole course is mostly in place. In addition, Gruenewald said signs could be installed along the course. He said after the design is finished, the board would work with Public Works Director Larry Coloni on completing the course. Gruenewald is hoping to have the course ready for play by the end of the summer.

Coloni said the park could be ready without many changes to make for a few challenges along the way. "We have a great park with a lot of trees," Coloni said. "You're going to see a lot of activity out there."

Having Nelson Park available would increase the chances of holding a tournament in the Decatur/Forsyth area, Gruenewald said. "We have the property to have a tournament-quality course," Gruenewald said. "It will bring people to the community." He said the course would make use of unused space in the park. Parts of the course would run along Stevens Creek, Gruenewald said.

# **Section 10**

# Internet – Newspaper Archives Searches David A. Strohl

(Articles are in reverse chronological order)

https://herald-review.com/news/local/forsyth-mulls-joining-battle-in-keep-pcbs-out-of-landfill/article\_d69378f6-5279-5028-b833-a391b8294a1f.html

Herald & Review June 3, 2014

### Forsyth mulls joining battle in keep PCBs out of landfill

Author: Chris Lusvardi

Groups fighting to keep potentially harmful chemical waste out of the Clinton Landfill are looking for support from more local governments. Champaign Assistant City Attorney Joe Hooker asked the Forsyth Village Board on Monday to join the legal fight to block polychlorinated biphenyl, or PCB, waste from being stored at the Clinton site. Peoria-based Area Disposal wants to be able to store PCBs at the landfill, which sits on top of the Mahomet Aquifer. The company has said a plastic liner will protect the chemicals from leaking into the ground. An Illinois Pollution Control Board ruling regarding the permitting of chemical waste storage at the landfill is currently being appealed, Hooker said. "We've got a battle on our hands," Hooker said. "There's no guarantee of success, but it's a legal battle worth having."

Forsyth and more than 80 other communities in 14 counties with more than half a million residents around Central Illinois rely on the aquifer for clean drinking water. The cost of participation in the coalition paying for private attorneys to work on the case is based on the population of the community, Hooker said. As a result, he said Forsyth would pay a relatively small portion of the overall costs. Champaign and Decatur are among the largest contributors because of their size, Hooker said. The more communities that become involved gives the group more strength, Hooker said. Forsyth trustee Steve Hubbard was among the board members who expressed interest in further considering the idea to join the effort. So far, Hooker said nine communities have joined the group. During the meeting, the village approved a separate resolution in support of the U.S. Environmental Protection Agency designating the Mahomet Aquifer as a sole source aquifer. Hooker said another coalition with 16 intergovernmental members are involved with the sole source designation efforts.

The public comment period on the sole source aquifer remains open until June 12. Comments should be addressed to William Spaulding, U.S. EPA (WG-15J), 77 W. Jackson Blvd., Chicago, IL 60604-3590 or <a href="mailto:spaulding.william@epa.gov">spaulding.william@epa.gov</a>. The aquifer is an irreplaceable resource, he said. "That's why we think it's such an important designation," Hooker said.

The Forsyth board began considering ways to get involved with efforts to protect the aquifer after resident Joe Dugger brought up the issue during its May 5 meeting. Village Administrator **David Strohl** has since explored the issue and invited Hooker to speak to the board.

# Internet – Newspaper Archives Searches David A. Strohl

(Articles are in reverse chronological order)

https://herald-review.com/news/local/govt-and-politics/warrensburg-library-settles-with-forsyth/article\_f905c9ea-80b4-5f1d-baa4-92ff9e8a32af.html

Herald & Review April 22, 2014

### Warrensburg library settles with Forsyth

Author: Chris Lusvardi

A settlement involving the village of Forsyth and Warrensburg's Barclay Library system has been reached regarding a taxation issue. Forsyth Village Attorney Jeff Jurgens said Monday the arrangement involves a lawsuit the village filed in November 2011. It involves properties in Forsyth that will be deannexed from the Barclay Library system.

With Forsyth operating its own library system but not levying taxes for it, Jurgens said the agreement allows for the properties in question to not pay taxes to Barclay Library after Jan. 1, 2020. In the meantime, he said the residents of the disputed properties will be able to use both libraries. Prior to the settlement, Barclay could have collected taxes on the properties indefinitely. The properties involved are in areas north and south of Weaver Road and west of Oakland Avenue. The issue affects more than 100 properties in Forsyth.

The settlement prevents further lawsuits after a series of appeals as Barclay would officially waive its rights to contest the issue, Jurgens said. Although the agreement was approved in the Macon County Circuit Court in March, Jurgens did not yet a have a copy of the settlement signed by all parties. Jurgens said the settlement is a compromise of the taxation issue, which surfaced in 2009.

The Forsyth trustees also approved its fiscal year 2014-15 budget with anticipated expenditures of about \$6.9 million, Administrator **David Strohl** said. The expenditures would decrease from the previous couple of years after the village paid off bonds for its sewer treatment plant, **Strohl** said.

In previous meetings, the trustees had debated long-range priorties for capital expenditures, particularly in Forsyth Park. Trustee Steve Hubbard raised the concern that sales tax revenue has been down during parts of the year, indicating that Hickory Point Mall has not generated the kind of revenue it has in the past.

# Internet – Newspaper Archives Searches David A. Strohl

(Articles are in reverse chronological order)

Herald & Review (IL) January 7, 2014

# Forsyth Selects Decatur Native as Administrator – David Strohl was Morton Business Manager

Author: Chris Lusvardi

The village of Forsyth moved in a timely fashion to fill its vacant administrator position. **David Strohl**, who formerly was the business manager in Morton, was selected and introduced Monday during the board meeting. **Strohl** said he grew up in Decatur and is looking forward to moving back after being away since the 1980s. He will begin the job Jan. 13. "I will meet with the mayor and board about priorities and establish those going forward," **Strohl** said. "I'm looking forward to getting to know the issues in the area."

**Strohl** was selected among three finalists for the position, Mayor Marilyn Johnson said. The board held three closed meetings in December to interview candidates. **Strohl** will replace Mike Miller, who announced his resignation in October after just over a year on the job. **Strohl** will be the village's fourth administrator since 2006.

Previous searches have taken as long as nine months to complete. Johnson said the board felt the sooner it made a selection, the better. "We had a lot of great candidates," Johnson said. "All of the trustees felt very strong about the one we chose." After having his position in Morton eliminated about two years ago due to financial reasons, **Strohl** had been serving as interim city manager in LaGrange, Mo. He hopes his experience in small communities will serve him well in Forsyth.

# Internet – Newspaper Archives Searches David A. Strohl

(Articles are in reverse chronological order)

https://www.pjstar.com/story/news/2012/01/10/raises-issued-to-three-employees/63682593007/

Journal Star January 9, 2012

#### Raises issued to three employees, one let go

Author: Steve Stein

Three village employees were given additional duties and raises Jan. 3 by the Village Board as part of a reorganization board members say will increase efficiency and meet future needs.

The reorganization also has saved money because of the elimination of the business manager position. **David Strohl**, who held the job for 11 years, was let go "strictly for financial reasons," said Mayor Norm Durflinger.

"David was a faithful employee, but because of the village's increasing expenses and negotiated salaries and an economy that hasn't changed to keep up with the increases, we decided to eliminate his position," Durflinger said. "We needed to cut our costs, and the village office was the most logical place to do it."

# Internet – Newspaper Archives Searches David A. Strohl

(Articles are in reverse chronological order)

The Peoria Journal Star (IL) May 27, 2011

#### **Morton Upgrading Financial Software**

Author: Steve Stein

The village has purchased new financial management software that will replace its current software, which was bought in the 1980s. Residents will notice the difference next year, when they'll be able to pay their village utility bills and view their bill payment history online, and save the village a few bucks. "We won't have to mail out bills to residents who pay online, so there will be some savings for us there," said village business manager **David Strohl**.

Village staff who deal with financial records such as accounts payable, payroll and the general ledger also will benefit from the new software, which was purchased this month from Civic Systems of Madison, Wis., for \$79,500. The cost includes 10 1/2 days of training and two days of on-site assistance. The annual support fee is \$11,600.

Related hardware, including printers, will be purchased from Pearl Technology of Peoria. **Strohl** expects the hardware cost won't exceed \$12,000. That would put the project about \$28,000 under the budgeted \$120,000. **Strohl** said a substantial portion of the savings will come from lower-than-expected data conversion costs. Only a year's worth of data will be converted, and the old financial management system will remain in operation through April 30, 2012, the end of the current fiscal year.

The process of updating the system began about a year ago with the hiring of a consultant from Clifton Gunderson of Peoria. "We needed to make changes because our AS/400 server is nearing the end of its useful life," **Strohl** said. "It doesn't have any more memory, and it runs on a platform that's no longer prevalent. We think the AS/400 is 11 years old, but I'll bet it's a few years older than that. We've gotten our money's worth out of it."

# Internet – Newspaper Archives Searches David A. Strohl

(Articles are in reverse chronological order)

The Peoria Journal Star (IL) May 18, 2010

#### **Morton Forms Commission for Business District**

Author: Steve Stein

The 12-member commission that will recommend approval or denial of requests for funds generated by a sales tax increase in Morton's new business district was established Monday by the Village Board. The nine voting members of the commission are business people who work in the district. One of the three nonvoting members is Village Board Trustee Jeff Kaufman, who voted against the formation of the district and 0.25 percentage point sales tax increase to 7 percent after two lengthy public hearings that attracted standing-room-only crowds and lively debate. The Village Board will ultimately rule on each funding request from business owners within the district.

Mayor Norm Durflinger nominated the commission members. Village Board members unanimously approved the appointments. "We looked for people who were interested in serving on the commission and for representatives from each commercial district in the village," Durflinger said about the voting members. Commission terms were determined by lottery.

Brian Hensley (Morton Buildings), Mike Sosman (Ruby Tuesday's) and Mary Spahr (building owner) will serve three-year terms. Brent Braker (Garber Heating & Air Conditioning), Katie VandenBerg (Eli's Coffee Shop) and Tina Wilmoth (Kmart) will serve two-year terms. Nick Esser (Heartland Bank and Trust), Jenna Grimm (Grimm's) and Bruce Kodatt (Pumpkin Glass) will serve one-year terms. Grimm is Durflinger's daughter. Durflinger did not vote on the nominations.

In addition to Kaufman, the nonvoting commission members are Village Business Manager **David Strohl** and Morton Economic Development Council Executive Director Jennifer Daly. Trustee Tony Huette, who voted in favor of the district and sales tax increase, is the alternate from the Village Board. The commission probably will meet monthly. Its first meeting is expected to be in June.

The additional sales tax money - an estimated \$400,000 annually for the 23-year life of the district - will be used for public infrastructure and streetscape improvements, village acquisition of property, facade work, and legal and consulting fees. Applicants for funds must prove that the money being requested will provide a benefit to the community. July 1 is the launch date for the district and sales tax increase. **Strohl** said the village probably won't receive its first revenues from the tax increase until October.

# Internet – Newspaper Archives Searches David A. Strohl

(Articles are in reverse chronological order)

The Peoria Journal Star (IL) August 12, 2009

#### Are You Loco? Think Local

Author: Emily LaHood

Think about the last time you bought a gift for somebody or a piece of furniture or needed a caterer for an event. Where did you go? If your answer is an out-of-town business or a big-box, corporate store, you suffer from what I call Fox Books Syndrome. In the movie "You've Got Mail," Meg Ryan's character struggles to keep her mother's bookshop open after the chain store, Fox Books, opens in the area. What is the cause of Fox Books Syndrome? Jennifer Daly, CEO of the Morton Economic Development Council, thinks it is a result of people not thinking about where their money goes after it hits the cash register. "Every dollar you spend has meaning. When you spend money in Morton, the local sales tax stays in Morton and doesn't go to another city." said Daly as she explained how cash flow works.

**David Strohl**, business manager of the village of Morton, said that sales tax is used to pay for "general funds for the village, such as police and fire protection, street maintenance, planning and zoning, and paramedics." When a Morton resident decides to go to the Metro Centre to buy a gift instead of supporting one of the shops around town, such as Ackerman Farms, Potter House, Pumpkin Postal or Yellow Brick, they are paying for Peoria's streets and upkeep. "People should just keep in the back of their minds to shop Morton first," said Daly. She added that, "People think they can't find what they need here, but Morton is full of hidden treasures."

For those in search of clothing stores, Daly suggested shopping at Hissy Fits on Main Street, which is an upscale children clothing and nursery store, and Used but Not Abused. For the critics of a second-hand clothing store, Daly argued, "It's amazing what you can find (at Used but Not Abused). All of their clothes are name brand and in good shape. Plus, you are recycling and keeping money in Morton." "Even places that don't focus on clothes, such as Wal-mart, Kmart and Grimm's Inc. have clothing to offer. It's so easy to find what you need in Morton if you just think before you shop."

Sales tax is not the only reason to buy local, though. Generally, people open their own businesses because it is what they love to do. They are interested in the services they offer, and, therefore, have more knowledge and better service than chain stores. Hometown Pharmacy owner, David Newell, said what sets him apart from corporate pharmacies is, "I care about the customers as people. We offer a different kind of buying experience. We are on a first name basis and know the people and how to help them."

Debbie Showalter, owner of Ewe-Nique Yarns, had similar thoughts on the subject and said, "Big box stores can't offer customer service and knowledge. They carry the basics, but we expand on it. We have anywhere from \$3 cotton yarns to \$80 qiviuck and other rare yarns. We also offer classes and open knit Thursdays." When discussing the Field Shopping Center,

# **Section 10**

# Internet – Newspaper Archives Searches David A. Strohl

(Articles are in reverse chronological order)

William Turney, owner of From the Field Cooking School, said that it is a "crafter's paradise. There's the bead and quilt shop, and Ewe-Nique Yarns is not your grandma's store." Unfortunately, Turney sees that, "Independent places are dying. Corporate shouldn't be the only option. People should have shopping alternatives." He also added, "It's frustrating. It would be interesting to know why people go to Peoria. We throw down some of the best (food) in town at good prices and could easily keep up with places like Seven in Peoria Heights." In the past three years, From the Field has expanded from a cooking school to a bakery, lunch café, smoked meat shop, catering company and even offers team building classes.

Turney tries to keep his ingredients local. He gets his sauces and honey from the surrounding area, and the meat he sells comes from nearby farmers who add no chemical hormones to their animals. Turney and Daly both agree that Morton has more to offer than people think. From the Field is not the only business that has many services. "Pumpkin Postal has a great gift shop," said Daly, "They sell wines that are made in Illinois and custom gift baskets." "Yellow Brick Boutique is also very unique," commented Daly. Not only is Yellow Brick a gift shop, but it is also an art gallery. Owner Mariam Briggs is an artist who fills the shop with her paintings. "I paint murals in homes," said Briggs. "Mainly people hire me for nurseries. I also offer painting and portrait services."

Although Briggs has many services to offer, she said that "after Christmas, there was a big drop in business." And, hers is not the only shop struggling. As a former employee of Potter House Gifts, I watched business dwindle through the summer, bolster a bit for the holidays and drop back down after the new year started. Whether it keeps Morton's roads clean and fire trucks running or keeps independent business owners from being unemployed, taking the time to think about shopping local really does make a difference. Don't fall prey to Fox Books Syndrome. Try Miller Paint Shop instead of Home Depot or Cool Beans/Eli's/Sweet Treats instead of Starbucks. All it takes is a little extra thought to make a big difference. A full list of Morton chamber businesses can be found on the chamber's Web site, www.mortonchamber.org.

### Internet – Newspaper Archives Searches David A. Strohl

(Articles are in reverse chronological order)

Pekin Daily Times (IL) January 8, 2009

#### **Study to Examine Retail Sites**

Author: Amanda Jacobs

PEORIA - The Economic Development Council for Central Illinois is teaming up with local municipalities to identify opportunities for retail development in the region. "We feel that we're underserved for retail right now," said Cindy Patterson, director of marketing and communications for the EDC. "We have room to grow, in other words." The EDC and its Retail Strategy Group have invited local governments to identify sites to be included in the Central Illinois Retail Study. The study aims to include at least nine sites.

The total estimated cost for the study is about \$51,800. Patterson said the cost will be divided equally among the number of sites participating, resulting in a cost of between \$5,000 and \$6,000 per site. However, she said that the total cost of the study could go up or down depending on the number of sites included.

All of the communities that participate in the study will save money, even if less than nine sites are included, said Pekin Economic Development Coordinator Steve Brown, who is also a member of the EDC's Retail Strategy Group. He said similar studies sponsored by a single community can cost that community between \$40,000 and \$60,000.

Representatives from Evanston-based firm Teska Associates Inc. will examine the available space and relevant consumer demographics for each site included in the study, Patterson said. Once the study is complete, the firm will provide each site with a specific list of retailers that would be well-suited to that location and help the participating municipalities distribute marketing materials to those retailers, she said. "Then we can better target who we should go for rather than working off a wish list," said **David Strohl**, business manager for the Village of Morton. In addition to identifying retailers that would be well-suited to Morton, the village will also save money by partnering with other communities in the study, he said.

**Strohl** said that Morton has identified two sites to be included in the study: the Field Shopping Center and the intersection of Courtland Street and North Morton Avenue. He said the latter site is one of the village's "prime retail locations" because of its visibility and highway access. The Village Board has agreed to pay no more than \$6,600 per site, for a total cost of up to \$13,200, **Strohl** said. The funding for the studies will come from the village's hotel/motel tax, he said. "We see retail development as a component of helping to support our tourism activities," **Strohl** said. "It's all kind of combined and interrelated."

Washington is prepared to pay at least \$6,000 to fund its participation in the study, said Planning and Development Director Jon Oliphant, and the money will come from the tourism and economic development portion of the city's budget. The city has selected Sunnyland Plaza as its site for the study, he said, and he has spoken to owner Neelam Salmen about her taking on some

# **Section 10**

### Internet – Newspaper Archives Searches David A. Strohl

(Articles are in reverse chronological order)

of the cost. Although Salmen has expressed some interest in funding part of the study, the city has not reached an agreement with her yet, said Oliphant, who is also a member of the EDC's Retail Strategy Group.

Retail development in Sunnyland Plaza would benefit not only Washington but also East Peoria, Patterson said. Oliphant said he hopes the study will bring in more businesses to generate revenue for the surrounding community. "It hasn't seen the type of development that we or the owner would like to see," he said. Oliphant said he hopes the study will allow Washington to promote Sunnyland in a good light and to determine what businesses would be a good fit for the location. "Basically we're looking for more concrete information to present to retailers," he said. "We certainly hope that it will give us a leg up."

Pekin, Havana, Bartonville, Chillicothe and West Peoria also have expressed interest in participating in the study, Patterson said, while Peoria is considering three or four sites that could be included. Havana's downtown area or the business park on Laurel Avenue are both good candidates for the study, said Economic Development Coordinator Terry Svob, but several details need to be cleared up before the city can officially commit. "It is something that did catch my eye," he said.

Havana would have to pay an additional cost because of its distance from the other locations, Svob said, and the total cost would have to be approved by the City Council before the city could participate. Pekin is reviewing several potential sites for the study, Brown said, and the city staff will make a recommendation to the City Council at Monday's meeting. "We've got quite a few nice locations that we could consider," he said.

Patterson said that now is a good time for the region to participate in the retail study, which will take a long time to complete. Once the national economy starts to improve, the participating sites will be prepared with information to present to prospective retailers, she said. However, Oliphant said there is not going to be a "magic potion" that will instantly create economic growth. "There's still going to be a lot of work to be done after we get the study completed," he said.

### Internet – Newspaper Archives Searches David A. Strohl

(Articles are in reverse chronological order)

Morton Times-News (IL) September 10, 2008

#### **Legislators Hope to Override Hotel Tax Veto**

Author: Jeanette Kendall & Nathan Domenighini

On Aug. 26, Gov. Rod Blagojevich vetoed a bill that would allow Morton and East Peoria officials to raise hotel tax by 1 percent, making the hotel tax equal to Peoria's at 6 percent. The idea to raise the hotel tax resulted after Brent Lonteen, president and chief executive officer of the Peoria Area Convention and Visitor's Bureau approached Morton and East Peoria officials about the idea in March. Lonteen said the PACVB would not be able to continue to do in the future what it has done in the past due to increased costs and a fund shortage.

Morton officials recently authorized its legislators to seek the special legislation that would allow the village to increase its hotel tax. "This was not unexpected," East Peoria city administrator, Tom Brimberry said. "It would have been a surprise had he not vetoed it. My understanding, it's this governor's M.O. He waits until the 60th day and then he vetoes it if there's anything he thinks smells remotely like a tax increase. This is not a tax increase. This simply gives East Peoria and Morton permission to raise their hotel tax if they choose. All it simply does is what good government should do, and that is put power in the local government."

Washington city administrator Bob Morris said Washington has not passed the hotel/motel tax increase. Currently, the hotel/motel tax there is 5 percent. If increase, it would raise to 6 percent. "We agreed to sit tight until everything was put in place as far as East Peoria and Morton is concerned," Morris said. "We went into this with the presumption that we would all do this jointly." Peoria City Council increased the city's hotel tax rate May 1 from 5.5 to 6 percent.

Rep. Keith Sommer said the next step for Morton and East Peoria is to work with legislators in the fall veto session. Rep. Mike Smith said the governor is "a little misguided." "Really, we're only talking about a user fee, and it's on people outside our community who are coming to stay in East Peoria or Morton. And, of course, the tax goes to help promote tourism and attract more people to the community," Smith said. "This is not a tax increase like when you think of tax increases. This is an increase - yes, and a tax - yes. But, it's put onto your hotel motel bill. It's not like the citizens of (either town) are paying for it," Brimberry said. "It's for visitors who come and stay, and the tax will go up by a penny and the money must be used for tourism type purposes to promote more visitors coming to your area."

Smith said Koehler would have to initiate the Senate Bill to override the governor's veto. "I think that's his intention. If that's successful, than I will attempt that in the House, too. I think it would be in the week after the election," Smith said. It would require 74 votes for an override to occur, Sommer said. Sommer said he normally does not pursue tax increases, but he discussed the matter with village officials and decided to go forward. "This could yield some economic benefit," Sommer said. "If (both towns) don't see any benefit, they can just roll back."

# Internet – Newspaper Archives Searches David A. Strohl

(Articles are in reverse chronological order)

Brimberry explained that because East Peoria and Morton are non-home-rule communities, permission to increase the hotel tax is required from the state. Washington and Peoria can increase theirs at will. Brimberry said Chicago attracts many trade shows and conferences even though they have a hotel tax rate of 13 percent. Village tourism director Susan Pyles said Morton needs to be linked to the PACVB because the organization provides services that help fill hotels. When there are large events taking place in the Peoria area, such as March Madness, conferences and soccer tournaments, Pyles said the PACVB helps distribute visitors to surrounding communities that contribute to the organization.

The governor's veto delays the legislation process, but will not affect any plans for the village because the budget is already set for the fiscal year, Pyles said. "At this point, it doesn't put any strain on the village," she added. Currently, the village pays \$10,000 to the PACVB to participate in its regional marketing campaign, village business manager **David Strohl** said. "We anticipate receiving \$210,000 (at the end of fiscal year)," **Strohl** said. With a 1 percent increase, he said the village could receive an additional \$40,000 in hotel/motel tax revenue.

The village has discussed contributing some of that money to the PACVB for additional services, but nothing has been guaranteed, he added. The projected 2007-08 hotel tax in East Peoria is \$750,000. If the tax were increased from its current 5 percent to 6 percent, it would generate an extra \$150,000. East Peoria leaders pay the PACVB \$80,000 annually to promote tourism and events for the city. In March, Mayor Dave Mingus said even if the hotel tax were increased, it does not mean the extra \$150,000 would go to the PACVB. East Peoria commissioner Mike Unes did not support the legislation. He argued that the increase in hotel tax does affect some local people because there are local business people who are buying hotel rooms.

# Internet – Newspaper Archives Searches David A. Strohl

(Articles are in reverse chronological order)

Morton Times-News (IL) August 7, 2008

#### **Alcohol Sale Hours Would Expand**

Author: Nathan Domenighini

An ordinance amending Title 3, Chapter 8 of the Morton Municipal Code, which concerns liquor licenses, would add five additional hours for liquor stores to sell alcohol. Class E license holders - licenses granted to liquor stores in Morton - would be able to open their doors from 6 a.m. to 1 a.m. Monday through Saturday to sell alcohol. On Sundays, Class E holders would be allowed to sell liquor from noon to midnight, except on Christmas. Alcohol sales would extend from Saturday into 1 a.m. Sunday. Currently, liquor stores are allowed to sell alcohol from 9 a.m. to 11 p.m. Monday through Saturday, except Christmas Day, and from noon to 11 p.m. Sundays.

The hours stated for Class E holders would also apply to Class H holders. Class H was added in the proposed amendment to allow wine and beer sales in grocery stores. The amendment also allows daily beer tasting to be included for both Class E and Class H license holders. Currently, there is a \$25 fee for liquor stores to hold wine-tasting events. That fee would be removed for both grocery stores and liquor stores.

Morton Mayor Norm Durflinger said the addition of beer tasting was requested by one of the liquor stores a while back. "Wine tasting was already allowed," he said. But, liquor store owners had to pay a \$25 fee to do so. Morton business manager **David Strohl** said the amendment reflects a similar liquor license in Washington. "Basically, we're utilizing Washington's code," **Strohl** said. "We're using the Washington ordinance as a model." He said both Class E and Class H license holders were given the same hours to create a parity between liquor sales.

The village board could vote on the amendment during the Aug. 18 meeting at Freedom Hall.

### Internet – Newspaper Archives Searches David A. Strohl

(Articles are in reverse chronological order)

Morton Times-News (IL) June 4, 2008

#### Village Will Borrow, Not Bond

Author: Nathan Domenighini

Morton Mayor Norm Durflinger said the best time to find a loan for the new firehouse is now. With interest rates increasing yearly for construction costs, Durflinger said the best avenue to fund the village's new firehouse would be to find a loan while construction costs are still cheap. The village will prepare requests for proposals to send to area banks in hopes of finding a loan with a low interest rate. The cost of the new firehouse has not yet been determined; however, Durflinger said the village will seek a \$4 to \$4.5 million loan. Another option the village could have pursued was postponing certain capital projects and re-allocating the funds from street improvements to the firehouse. Durflinger said it might cost the village more to hold the street projects, which are also subject to inflation. "The inflation rate of street work could cost (up to 15 percent more a year)," he said.

The village chose not to bond due to a change in Illinois law that allows for conventional loan terms to extend from one year to 10. "Bonding is difficult and a little more expensive," Durflinger said. The board seemed rather supportive of finding a loan, and finding it soon. Durflinger said he has heard some concerns from residents about the village using a loan to fund the firehouse, and was quick to explain it will not be the first time the village has borrowed. "This is probably the same thing anyone does when they buy a house," Durflinger said. "This is not the first time the village has borrowed money."

Morton business manager **David Strohl** said the last time the village borrowed money was about 20 years ago for special assessments. He was not sure how much that loan was. **Strohl** said borrowing now is an ideal situation for the board considering the current state of the economy. "Interest rates are still low even though the economy is somewhat struggling," he said. "(A loan) certainly allows us to carry on with current capital projects." "Normally, the village would be using bonds, but there is a cost to that," **Strohl** said, adding the changes in state law provide a better opportunity for Morton.

The village's attorney, Tom Davies, will prepare request for proposals to be sent to area banks. Durflinger said he expects the requests to be ready within two weeks and no later than one month. The request will be for a 10-year loan, he added. "We will move forward as fast as we can," Durflinger said.

# Internet – Newspaper Archives Searches David A. Strohl

(Articles are in reverse chronological order)

The Peoria Journal Star (IL) September 19, 2003

#### **Morton Fines Hotel Owner for Paying Tax Late**

Author: Unknkown

The village has fined a local hotel owner who paid his June taxes late to protest Morton's tourism policy. Bill Welk, owner of the Best Western Ashland House, Holiday Inn Express and the Welk-Um Inn, was fined \$500 for not paying the tax on time. Welk said he is protesting the fines because the money will go into the village's general fund. If the money would go to the tourism program, he said he would simply pay them. "I'm not above the law," he said. "I made the protest knowing I was not abiding by the law."

In letters dated earlier this month from village Business Manager **Dave Strohl**, Welk was told he had been fined just over \$500, plus \$118 in interest. **Strohl** said a hearing has been scheduled for Sept. 25 with **Strohl**. If Welk is not satisfied with the result of that hearing, he may appeal to Mayor Don Roth.

Welk has also been given a Sept. 29 court date in Tazewell County for the three citations issued. Village Attorney Tom Davies said Welk is charged with petty offenses for violating a village ordinance. No jail time is possible, but additional fines up to \$750 per offense could result. Welk kept his June taxes for the three hotels in escrow at a Morton bank earlier this year as he sought promises from the village board on how the money would be spent. On Aug. 15, he paid the nearly \$13,000 bill at village hall with 12 bags of assorted change and small bills.

# Internet – Newspaper Archives Searches David A. Strohl

(Articles are in reverse chronological order)

The Peoria Journal Star (IL) September 17, 2003

# Morton Will Spend \$25,000 on Initiative – Tourism Efforts Include Marketing Campaign, Study

Author: Michael Noyes

Village officials on Monday approved spending a total of \$25,000 on two separate initiatives to bolster Morton's tourism efforts. Board members voted unanimously to spend \$10,000 to participate in a regional marketing campaign run by the Peoria Area Convention and Visitors Bureau. It also approved an agreement with the organization for \$15,000 to conduct a study of Morton's tourism assets and make recommendations on how best to utilize them. Both agreements were recommended by Morton Business Manager **Dave Strohl**, who was tapped to run the village's tourism program when it brought that program in-house earlier this year. "I'm glad to see us taking a step forward and moving on," said board member Ginger Hermann.

Morton will be included for a third year in the regional Illinois River Country marketing campaign aimed at attracting visitors to the central Illinois region. The agreement with the PACVB study calls for that organization to recommend an advertising and marketing plan for the village within 90 days. Morton hotel owner Bill Welk has been critical of the village's decision to bring the tourism program in-house. On Monday, he criticized the board's action. "This deal was done before we got here. Where was the discussion?" Welk said. "It's no longer a village board. It's a dictatorship." Hermann said **Strohl** made a recommendation for approval and there was no need to drag out the meeting with a lengthy discussion when members were in agreement.

Board member Steve Leitch said the PACVB brings a tremendous amount of experience to the table that Morton can use. "We're just adding to our knowledge so we can make better decisions in the future," he said. Welk also has organized a Morton Citizens for Tourism group that will hold a meeting at the Best Western Ashland House at 7 tonight. The group has invited all of the Village Board members to attend, along with **Strohl**. Many of the board members have said they will be unavailable to attend because of scheduling conflicts. **Strohl** said he also has a conflict, but welcomed the group's input. "They're free to meet and provide any recommendations they have to the board," he said.

# Internet – Newspaper Archives Searches David A. Strohl

(Articles are in reverse chronological order)

The Peoria Journal Star (IL) August 22, 2003

#### Morton May Seek Help with its Tourism Program

Author: Michael Noyes

Village officials may seek guidance in the development of a tourism program from the Peoria Area Convention and Visitors Bureau. Officials from the PACVB already are scheduled to make a presentation on the Illinois River Country Cooperative Marketing Campaign at the Sept. 15 meeting of the Morton Village Board. Village officials say they may also seek assistance from that organization in developing an in-house tourism program for Morton.

Morton Business Manager **Dave Strohl** said he hasn't discussed any specific role with the PACVB. On Thursday, he said it is "certainly possible" that organization may assist Morton in its efforts to establish a tourism program. "They're open to working something out with us," **Strohl** said. "It kind of depends on what we want them to do."

Vickie Clark, senior vice president and chief operating officer of the PACVB, said one of the tasks her organization performs is representing and advising communities on similar projects. "Tourism and marketing is what we do," Clark said. "One of our responsibilities is to increase tourism for Morton, as it is for all of the (eight) counties and the municipalities we represent."

Village Board Member Ginger Hermann said she would be receptive to any expertise the PACVB could provide as Morton organizes its own operation. The tourism program had been contracted to the Morton Chamber of Commerce for the past three years. Hermann said she has worked with Clark in the past on the Illinois River Country project, which Morton has participated in the past two years. "I would be interested in a presentation that would include what they could do for us and at what cost," Hermann said. "(Clark is) very knowledgeable. I think she is willing to help us get to where we need to go in any way they can."

**Strohl** said initial talks with the PACVB centered around the village's further participation in the Illinois River Country project. However, the PACVB may be asked to take a larger role in shaping Morton's tourism program following the board's rejection of a plan for a tourism commission.

During the meeting Monday night in which board members rejected the commission, some members also expressed an interest in hiring a professional group to help with future plans. The Illinois River Country Cooperative Marketing Campaign has featured 28 different partners for a collective media campaign to promote tourism to the area. Clark said the primarily print campaign reached more than 2 million households in 2002 and more than 4 million households this year.

# Internet – Newspaper Archives Searches David A. Strohl

(Articles are in reverse chronological order)

The Peoria Journal Star (IL) August 19, 2003

# **Morton Tourism Ordinance Falls Flat – No One on Morton Board Moves to Create Commission**

Author: Michael Noyes

Morton - An ordinance that would have created a commission to help direct the village's tourism program died for lack of a motion Monday night. Morton Business Manager **Dave**Strohl proposed the concept of a nine-member commission, and an ordinance was drafted shortly after he was appointed to form a plan for a village tourism program.

The Morton Chamber of Commerce had been contracted to run a tourism program for the past three years. On Monday, board members were critical of the plan to establish a commission that would have been responsible for drafting an annual program, developing a five-year strategic plan and making recommendations on spending proposals.

Board member Steve Leitch said if a group of citizens or business leaders wants to form their own commission to give input, he would support that. Leitch said the village then could take requests for money, similar to a grant program. **Strohl** said he envisioned a commission that would help develop programs and set the direction for the tourism program. "There's more to this than just taking requests for hotel/motel funds," **Strohl** told the board.

Board member Craig Schwarzentraub said he believes the board needs to hire a professional to help put together a tourism plan. "I don't believe the best way to approach this is with a group of volunteers," Schwarzentraub said. "I think we need to spend some money and hire a professional."

Reached after the meeting, Morton hotel owner Bill Welk, who has been critical of efforts to bring the Morton tourism program in house, was also critical of the board's inaction on Monday night. Welk said when board members decided to bring the program in-house, they said they had the experience and ability to run it. He said that is not consistent with Schwarzentraub's proposal to hire a professional. "What is the real truth here?" Welk said. "I think this is just one more scenario where they're trying to not spend the money."

# Internet – Newspaper Archives Searches David A. Strohl

(Articles are in reverse chronological order)

The Peoria Journal Star (IL) August 16, 2003

# Protest By the Bag – Morton Hotel Owner Pays \$13,000 in June Taxes in Change, Small Bills

Author: Michael Noyes

Lugging 12 bags of assorted change and small bills Friday, a Morton hotel owner paid nearly \$13,000 he owed for hotel/motel taxes in June. Bill Welk, owner of the Best Western Ashland House, Holiday Inn Express and the WelkUm Inn, was accompanied by co-owner Marcia Paul and four employees as he marched into Village Hall to make a point, as well as a payment. "These people work because of tourism," Welk said of his employees as they deposited the money with village officials. The unusual payment method was another way for Welk to express his displeasure with a recent Village Board decision to take direct control of tourism efforts.

After apologizing to office workers for creating extra work, Welk told business manager **Dave Strohl** of his belief that the money be spent only on tourism. "The Village Board needs to do what they're supposed to do and that's spend this money on tourism," Welk told **Strohl**. Board member Darrell Vierling called the move "grandstanding." "It doesn't surprise me," Vierling said. "(Welk) will do what he can to get whatever publicity he can." Vierling said the payment caused some hassle for employees who had to sort the coins and dollars before taking them to the bank, but otherwise he was satisfied. "That's legal tender," Vierling said. "We don't argue with that, and he can pay it any way he wants."

After Welk left, **Strohl** said he had no comment on the payment, but he plans to review the case with the village attorney. No fines or penalties have yet been assessed for the late payment. In July, Welk notified the village he was holding the tax money in escrow at a Morton bank. Welk said he wanted assurances the money would never be used for anything other than tourism efforts. Village Board members said they could not make such promises and that Welk must pay his taxes whether he agrees with the tourism plan or not.

**Strohl** said the village code outlines a number of potential penalties for refusal to pay the hotel/motel tax, including fines up to \$750 and a license suspension for a first offense. Repeat offenses could result in up to six months in jail. "Obviously, that still applies," **Strohl** said. Before the board changed its village tourism efforts, a committee set up by the Morton Chamber of Commerce had handled the program for three years. Welk contends the village doesn't have the expertise to run the program efficiently.

Village Board members, however, have said the move was simply about accountability and giving the board more input on how those hotel/motel tax funds are spent. Vierling said the village must spend the money on promotional activity that results in overnight stays. On Friday, Welk said he is concerned the board will hold onto the hotel/motel tax money until it can get home rule, which would give the village more latitude in how those funds are spent. "(Saving that money is) their intention until they can get home rule through," Welk said. Earlier this year,

# **Section 10**

# Internet – Newspaper Archives Searches David A. Strohl

(Articles are in reverse chronological order)

voters rejected a ballot initiative that would have approved home rule for Morton. Board Member Steve Leitch supported the home-rule initiative but said he is not aware of any plan to hold onto tax money so it can be spent differently. "That's never been our intent," he said. "I don't know that I personally will ever ask anybody to vote for home rule again."

# Internet – Newspaper Archives Searches David A. Strohl

(Articles are in reverse chronological order)

The Peoria Journal Star (IL) August 12, 2003

# **Tourism Ordinance Includes Commission – Advisory Panel Would Give Input to Morton Leaders**

Author: Michael Noyes

Plans for the Morton tourism program will include the formation of an advisory commission if Village Board members approve a proposed ordinance. Morton Business Manager **Dave Strohl** was appointed by the board to organize a tourism program when it voted recently to promote tourism itself. The ordinance calls for a nine-member volunteer commission. Members would be appointed by the mayor with the consent of the board for one-, two- or three-year terms.

**Strohl** said the concept of the commission is based loosely on the tourism committee the Morton Chamber of Commerce established when the chamber was contracted to run the program three years ago. "From my point of view, it's important to get input from various segments of the community," **Strohl** said.

Commission members will prepare an annual plan, along with developing a five-year strategic plan, the ordinance says. The commission also will consider spending proposals and requests and make recommendations to the Village Board.

Board Member Ginger Hermann said she supports the concept of the commission. "The board values the input from the public, and this will be a process we can use to gather that input," Hermann said. After the board voted June 7 to bring the program in house, chamber tourism committee member Mary Jo Lewellen said she would support the formation of a new commission to provide input. "We've done some good work, laid a good base," Lewellen said. "(The village is) still going to need some input from people in the community who have a background in tourism."

**Strohl** said he crafted the ordinance after studying similar programs in surrounding communities such as Pontiac and Rock Falls. "Obviously the sooner the better," **Strohl** said when asked about a timeline for the formation of the commission. "Hopefully we can get this done and get it established and get moving." The ordinance to establish a tourism commission will likely come up for a vote at Monday's Village Board meeting.

# Internet – Newspaper Archives Searches David A. Strohl

(Articles are in reverse chronological order)

The Peoria Journal Star (IL) August 6, 2003

# Morton Hotel Owner Protests with Tax Funds – He's Putting His Money in Escrow, Hoping it Will be Used on Tourism

Author: Michael Noyes

The owner of three Morton hotels is withholding his hotel/motel tax dollars and seeking assurances from the Village Board on how that money will be spent. Hotel owner Bill Welk wants the board to promise those tax funds will be used only for tourism efforts, but board members say they can't make promises for future boards. Welk, owner of the Best Western Ashland House, Holiday Inn Express, and Welk-Um Inn notified the village in July he would deposit hotel/motel tax funds into an escrow account at a Morton bank.

Welk would not say exactly how much money was deposited, but said it was several thousand dollars. In a letter to the board dated July 30, Welk requested a hearing regarding payment of those funds. The letter states that Welk would not have a problem paying as long as funds "will never be used for any other purposes even if home rule is approved."

Village Board members say they are currently bound by law to spend those funds on tourism efforts. Board Member Darrell Vierling said future boards would not be bound by any promise the current board might make. "Legally, he's obligated to pay it, whether he agrees with (the plan) or not," Vierling said. Welk said he plans to put hotel/motel tax funds for next month in escrow as well. "I'm going to lose. There's no way I cannot pay eventually," Welk said. Withholding those funds is simply "a way for me to say 'This is wrong.' "

The board recently decided to take over local tourism efforts. For the past three years, the tourism program had been handled by a committee set up by the Morton Chamber of Commerce. Welk has criticized that move, saying the village doesn't have the expertise required to run the program efficiently. "It's going to take those people months to get up to par because they have to start the process all over again," Welk said.

Village Board members have said the move gives them more input on how tourism dollars are spent. The village code outlines a number of penalties for refusal to pay the hotel/motel tax. For a first offense, the code calls for a fine of \$200 to \$750 and/or suspension of all village licenses. Repeat offenses may be punishable as a misdemeanor, with up to six months in the county jail. The business manager is responsible for arranging a hearing and determining the proper amount of tax owed, subject to an appeal process.

Business manager **Dave Stohl** said he would not comment on any specific case. "Obviously we would be interested in enforcing the village's code just as we would any violation of the code," **Strohl** said, adding that to his knowledge, no one has previously refused to pay the tax.

# Internet – Newspaper Archives Searches David A. Strohl

(Articles are in reverse chronological order)

The Peoria Journal Star (IL) July 9, 2003

# Morton Board to Oversee Tourism – Village Votes to Take Charge of its Own Marketing Spending

Author: Michael Noyes

The Village Board will now directly oversee the spending of tax dollars on efforts to increase tourism to the area. For the past two years, the board contracted with the Morton Chamber Commerce to develop a program to market Morton. On Monday night, the board voted unanimously to conduct those tourism efforts in-house. The chamber developed a tourism committee to make decisions on specific projects, using a portion of funds generated by the village hotel/motel tax. Board members said they aren't criticizing the tourism board's efforts. They say it's simply a matter of accountability, and they should have more oversight since they are responsible for how funds are utilized. Tourism board supporters who attended the meeting Monday night said they believe the action came about because several members of the tourism board did not support a ballot initiative to make Morton a home rule community. "This is their retaliation against that board," said developer Bill Welk, who said he was an early supporter of the implementation of a hotel/motel tax to fund tourism efforts. "It is government at its worst."

Village Board member Ginger Hermann said that wasn't the reason for her vote. "I'm not a retaliatory person," Hermann said. "We're above that, I hope." On Tuesday, Morton Chamber of Commerce Director Mike Badgerow said he doesn't believe the move was done in retaliation. Badgerow said he wasn't surprised, and the move to shift efforts in-house is common. "Of course it's disappointing, because we spent almost three years developing a program and, in essence, have a vote of no confidence," Badgerow said. "But it's their responsibility . . . they feel they have a stronger program, so we say 'Go for it."

Village Board member Jeff Kaufman, who proposed the change, said retaliation was not the reason for his recommendation. The move will simply streamline the process, and the village has the personnel and administration to do the job. Tourism board member Marcia Paul said the village lacks the experience and expertise to do the job as effectively. "It's really sad," Paul said. "We're in the peak of doing our projects right now." Earlier this year, tourism board officials said they believed this could be a banner year in terms of results.

Hermann said the village does have the personnel and knowledge to do the job. The board appointed business manager **Dave Strohl** to develop plans for a village program to promote tourism. "I would hope there would be a smooth transition," Hermann said. "I think we will pretty much want to continue (down the same path the tourism board has been on) to start with." During the meeting, Hermann said the issues were efficacy and accountability. "It was kind of uncharted territory and there were some growing pains involved," Hermann said. "I think since we're accountable, it should be brought in-house."

### Internet – Newspaper Archives Searches David A. Strohl

(Articles are in reverse chronological order)

The Peoria Journal Star (IL) March 16, 2000

# West Peoria Finds Computer Void of Files – Aldermen Claim Former Administrator Erased or Took Data

Author: Sonya Klopfenstein

Some officials here contend that when their former city administrator left last month to take a position in Morton, he left a void larger than empty shoes for someone else to fill. Instead, several aldermen allege **David Strohl** erased six years worth of computer files on his way out or took them with him on disk - leaving city staff struggling to carry out their day-to-day functions. For example, 4th Ward Alderman Dennis Kroll is not sure the city's finance committee will be able to pull together next year's budget without **Strohl's** assistance - and his working computer copy. Left with only paper copies of all the resolutions, ordinances, manuals, budgets, grants and other documents the city has produced since its incorporation in 1993, Kroll and others say it feels as if they're starting from scratch all over again. "The city computer is void. It's empty. Six years of documentation and research is lost," said Ward One Alderman Leroy Dohm Jr. "When you have to retype 35 pages to add one word, that's uncalled for. It's ridiculous."

But **Strohl** - who assumed duties as Morton's business manager March 1 - said Wednesday that no one from West Peoria has formally contacted him about any sort of problems with lost data. He said there was no formal policy on the books about maintaining electronic copies of documents and that all his work was left in printed form. "I think it might be a misunderstanding on their part," **Strohl** said. "Every time I created a document, like an ordinance, (the council) would act on it - print it, sign and seal - and then I'd delete it." "I guess there may have been a perception that everything created was still on the computer, but that was not the case," he said.

City attorney Bill Connor would not comment specifically on what legal options the city has available, saying only, "My investigation of the situation is continuing." Second Ward Alderman Rocky Mathewson said the council is presently reworking their personnel and policy manuals to include language that spells out electronic files as well as paper-generated documents must be saved and backed up periodically by future administrators. However, he said pursuing the matter legally against **Strohl** would be "frivolous." "He really had no direction as to what to save. No one told him either way," Mathewson said. But Kroll said an investigation is worth pursuing. "It's intellectual property in that he may have authored part of it, but we paid him for it, so it's our property," he said. "It's pretty much up to the mayor (to authorize a lawsuit)," Kroll said. "I think (**Strohl**) should be sued." As far as preparing next year's city budget, **Strohl** said he and city officials made arrangements for that task to be his last remaining commitment to West Peoria. **Strohl** said he will hand over finalized numbers by the end of this week. Meanwhile, members of a search committee are looking for an interim administrator. So far, they've interviewed two candidates, and a mayoral recommendation is expected once Mayor Jim Dillon returns from an out-of-state trip.

# Internet – Newspaper Archives Searches David A. Strohl

(Articles are in reverse chronological order)

The Peoria Journal Star (IL) March 2, 2000

Morton Gets New Administrator – Business Manager Comes to Village from West Peoria Author: Mike Hinken

A new business manager started work for the village of Morton on Wednesday. **David Strohl** takes over for Bill Collingwood, who served as both business manager and treasurer for 17 of his 24 years of service in Morton village government. Collingwood will remain on staff part time as village treasurer. **Strohl**, an Illinois Central College and Illinois State University graduate, comes to Morton from the city of West Peoria, where he served as city administrator since 1994. "My decision to take the job with the village of Morton does not reflect any way on West Peoria," **Strohl** said. "The village of Morton has different opportunities than West Peoria. Morton has a different dynamic, it's a growing community that has a new set of challenges that I was looking for in my career."

Village trustee Darrell Vierling said about a dozen candidates were considered for the position. "We're excited about having David on board," Vierling said. "While David may not have had the experience of the other candidates, we felt he had a good foundation of experiences so far, and that he was open to being trained for things we want him to do in the job." **Strohl** will manage the day-to-day operations of the village, from billing the more than 6,000 utilities customers to overseeing aspects of public safety. His position is full time. "There will be a little bit of a learning curve with the new job," **Strohl** said. "It's somewhat different than what I've been doing. My new job will be a little more tightly focused on certain government issues in Morton than in West Peoria."

While with the city of West Peoria, **Strohl** helped organize many firsts, including drafting the first residential waste collection contract; negotiating the city's first gas, electric and telephone franchise agreements; and creating the first sidewalk replacement program. He also assisted the mayor of West Peoria and other city officials, while managing the daily operations of the city. **Strohl**, who majored in political science at both ICC and ISU, has administrative experience working with Peoria County and the village of Peoria Heights. "I look forward to working with the village of Morton," he said. "It's a small community on the suburbs of a large one, so it has metropolitan amenities. I could easily see myself staying in Morton for a good while."

# Internet – Newspaper Archives Searches David A. Strohl

(Articles are in reverse chronological order)

The Peoria Journal Star (IL) November 9, 1998

# Five is a Fine Age for West Peoria>Residents Still Relish Their Sense of Ownership Author: Jennifer Davis

City Hall -- a small tan brick building catty-corner from Haddad's Super Market on Rohmann Avenue – is perfect evidence of how this bedroom community, now just 5 years old, still is evolving. The main office is all new computers, gleaming white walls and gray, industrial carpet. But one wall is a plastic tarp separating the major construction on the other side. And, for now, the city clerk, city administrator, bookkeeper and zoning officer arrange their desks in a maze to squeeze into the small space that used to be the city's Oriental market.

"You have to be pretty friendly," said a laughing **David Strohl**, the same city administrator who was hired four years ago when he was a 24-year-old master's degree student. Now 28 but still working on his degree, **Strohl** likes to say he and this city of 5,300 residents have grown up together. For the city's part, it's been a slow, steady, economical maturation.

Mayor Jim Dillon has no grand plans of attracting a casino or rebuilding a riverfront -- even if he could. He wants nicer sidewalks, streets and sewers. It's not sexy stuff, but it's what helped residents decide to go from being an unincorporated area to an official town five years ago Nov. 3. (Even the city's birthday was low-key and low-budget: \$60 total on cake and decorations for the voters who used City Hall as their polling place.) Today, the city has a sidewalk replacement program, two police officers committed 12 hours a day to patrol, and a code-enforcement program that shows in the tree-lined streets of well-kept, Depression-era bungalows.

It also has Guydeen Roos, a city clerk who will either help you or rattle off the number of someone who can. That is, when she's not away from her desk on a call with the volunteer fire department. "Before, if someone had a problem, they didn't know especially where to go -- although the township was helpful," said Roos, a 27-year resident. Now, when residents call City Hall after hours, they can get the mayor's home number off the answering machine. "People find that hard to believe," said Dillon, who co-owns Dillon JC Plumbing of Peoria. But given the obvious community spirit, perhaps they shouldn't.

On Sunday, residents gathered at the Knights of Columbus Hall on West Hill Street for a chili supper to benefit 10-year-old Michael Daniels, who recently was diagnosed with leukemia. Roos took a call the other day from a man who had moved away from the community but was still concerned about the family. Dillon also recalls how everyone pulled together to clean up after this past summer's windstorm. "I was out working with the street crew that night, and people were coming out of their homes to help," said Dillon. "They were picking up branches and getting their saws to cut up trees in neighbors' yards. I'll never forget that."

Bryant DeFrance, the city's first mayor -- indeed, the man most responsible for West Peoria being a city at all -- says the best thing about the incorporation is the sense of ownership.

# **Section 10**

# Internet – Newspaper Archives Searches David A. Strohl

(Articles are in reverse chronological order)

"There's a little more self-pride and the knowledge that we control our own destiny," said DeFrance, who researched incorporation after the township told him there was nothing it could do about the crumbling sidewalks. Using the statute books of friend and Peoria County Coroner Herb Buzbee, now deceased, DeFrance spent hours every week looking into the law. He then mounted a grass-roots campaign with the support of the area resident council.

On Nov. 3, 1993, residents voted by a 10-to-1 margin to incorporate. "And we've still been able to hold taxes down. I'm glad of that," DeFrance said. Most West Peorians pay a property tax rate of less than \$7 per \$100 equalized assessed valuation, compared to the \$8.08 per \$100 that the majority of Peorians pay. (That figure varies some depending on the school district, but most Peorians and all West Peorians are in School District 150.) "I think people like the situation the way it is," **Strohl** said.

### Internet – Newspaper Archives Searches David A. Strohl

(Articles are in reverse chronological order)

The Peoria Journal Star (IL) May 13, 1998

# County Begins Ripping into Rohmann>Avenue Being Torn Up in \$344,000 Follow-Up to Earlier Improvements

Author: Mike Ramsey

WEST PEORIA -- Cars have a tendency to speed through the 2000 and 2100 blocks of Rohmann Avenue, according to resident Don Shelton. Motorists lean on the gas pedal along the tidy residential street as they make their way to or from nearby Sterling Avenue, he says. Not anymore. For the next month, speeders, leisurely drivers and even home owners with driveways will encounter the ultimate speed bump. County work crews this week began breaking up the pavement -- to a depth of 1 foot -- to make way for a new swath of concrete from Waverly to Cedar avenues.

No minor surgery here. On Tuesday, slabs of the old road chunks were piled up like so much peanut brittle for a giant. The dinosaur-sized jaws of a backhoe loaded pieces of the dismembered street into the back of a hauling truck. The \$344,000 task is the follow-up to a county highway project that last year added new curbs and storm sewers on Rohmann. Shelton remembers that was a bit of a pain, too, but acknowledged residents can use back alleys to access their homes. "If I didn't have the back, I'd find it very aggravating," said the 75-year-old, who has lived on the street for 10 years. "It'll be nice when it's done."

The county notified residents ahead of time with fliers and news announcements. And city officials say affected home owners have been good sports about the project. "So far, no one has called up here that I'm aware of," said **David Strohl**, West Peoria's city administrator. The county also will do some surface work on Rohmann east of Cedar toward Western Avenue, but not on the scale of this week's excavation, a highway department official said.

# Internet – Newspaper Archives Searches David A. Strohl

(Articles are in reverse chronological order)

The Peoria Journal Star (IL) May 15, 1996

#### West Peoria's Special Taxing District Will Fund Sidewalks

Author: Anthony Smith

A special service area will be created in order for the City Council to levy taxes to help pay for 1,900 feet of sidewalk along Barker Avenue, unless 51 percent of the residents there object and file a petition within 60 days. Residents along Barker between Western and Waverly avenues would pay 50 percent of the costs of building the sidewalks and 25 percent of the costs of curb and gutter construction, officials said. That cost would be spread out over five years on the tax bill, according to the assessed valuation of their property. The city would pick up the rest of the tab. "This was the easiest way to get it started," said Mayor Jim Dillon at a public hearing Tuesday night.

City administrator **David Strohl** said there are two methods in which the public pays for projects like this. The public would have no input if a special assessment is used. In the method chosen by the City Council, 51 percent of the residents affected must want the establishment of the service area. Council members went a step further, requiring the consent of 70 percent of the homeowners. "There's no really good way of doing this but this is the lesser of two evils," he said.

About 25 people attended the hearing at the West Peoria Township Building to ask questions and voice opinion. "I have mixed feelings. I don't know what to think right now," said Denise Hufeld. "This whole thing has been very vague," said one homeowner who would not give her name. "We don't have a dollar figure here, we don't know who's doing it. There's too much vagueness here. A lot of people want to know exactly what's going on."

But Robert DeSutter of 2006 Barker said all 16 homeowners in his block are in favor of creating to service area to get the new sidewalks. At least two meetings were held to clarify and explain the advantages. "I'd rather had seen it done by linear foot but since that's not the way the program is set up, we have to do it by assessed value. I want a new sidewalk. I put in a new driveway last year and I'd like to have a new sidewalk. I know it will improve the neighborhood," he said. Forty-five houses will be affected.

### Internet – Newspaper Archives Searches David A. Strohl

(Articles are in reverse chronological order)

The Peoria Journal Star (IL) April 24, 1996

# West Peoria Makes Zoning Appointments>Trio Helped Draft Zoning Ordinance

Author: Grant Boxleitner

Three members of the West Peoria Planning and Zoning Commission, which drafted the city's zoning ordinance last month, were appointed to the Zoning Board of Appeals by the City Council on Tuesday night.

That list includes West Peoria Township Trustee Sharon McBride, who will add Zoning Board of Appeals member to her long list of titles. The appointment of McBride comes one day after West Peoria Township supervisor John Seabeck said he will appoint her to the Greater Peoria Mass Transit District Board. The West Peoria seat was vacated Monday when L. Ray Tilly resigned after 26 years. "It's kind of weird timing for both of these to come at once," said McBride, who must resign her West Peoria Township trustee position to take the job on the transit board. Seabeck and Todd Baker, who also served with McBride on the city's planning and zoning commission, were also appointed to the Zoning Board of Appeals. John Venzon of Ward 4, Karen Turner of Ward 2, Rob Rembke of Ward 2 and Judy McComb of Ward 2 round out the board appointments.

The planning and zoning commission was dissolved last month when the City Council approved the new zoning ordinance. "We wanted to get as many experienced people who drafted the zoning ordinance to serve on the board of appeals," said Alderman Dan Kerns. Retired East Peoria policeman Orville Smith was re-appointed as the city's code enforcement officer. City Administrator **David Strohl** was also named the city's zoning officer. **Strohl** will interpret the zoning ordinance for local residents.

Before the appointments were voted on, alderman Dennis Kroll accused Mayor Jim Dillon of setting a hidden agenda because he did not list the appointees on the meeting agenda. Kroll said he did not have a problem with any of the candidates but wanted a chance to review them before the meeting. "This deletion of these names is an insult to this council," Kroll said.

Dillon said the deletion of the candidate names was an oversight by **Strohl** and himself when they made the agenda. Kerns said he resented Kroll's "hidden agenda" comments. "You could have called the mayor or myself if you wanted a list of the names," Kerns told Kroll. But after the discussion, all appointees were appointed unanimously.

## Internet – Newspaper Archives Searches David A. Strohl

(Articles are in reverse chronological order)

The Peoria Journal Star (IL) February 1, 1996

# **City Administrator Wins Praise>College Student Handling West Peoria Community Affairs**

Author: Sharon Oberholtzer

It's not often an aspiring city administrator, just out of college, gets a brand new city to help run, **David Strohl** knows. But **Strohl**, 25, was hired part-time as West Peoria's city administrator less than a year after the community of about 5,300 incorporated. Sure, the part-time salary of \$9,000 wasn't going to make him rich, but the fact he had a job in his field so soon after his graduation from Illinois State University in 1994 with a degree in political science was a plus. "I knew it wasn't much money; I knew it was part-time, but I was in school," said **Strohl**, who has been working on his master's degree in public administration at the University of Illinois, Springfield. This spring, however, he is taking a semester off.

The Richwoods High School and Illinois Central College graduate also knew the position would provide good on-the-job training. When the City Council hired **Strohl**, said city attorney Joe Cooper, some questioned whether West Peoria needed an administrator. "After he was hired, it became apparent he was needed. He has saved us money and a lot of mistakes." Cooper had more praise for the young administrator. "Dave pretty much earned his way," he said. "He is knowledgeable, hard working, and helps us all."

**Strohl** moved into his part-time position at City Hall in October 1994, a month before the city celebrated its first birthday. In July 1995, he was hired full time for the grand salary of \$20,000 a year. This is his only job, but that wasn't always so. "When I came on board here," **Strohl** said, "I was an assistant to the village administrator at Peoria Heights. As an intern there, I wrote a grant and I administered it; I also worked part-time for Peoria County. The (Heights) grant ended, and I came to West Peoria."

**Strohl** was the first intern for Peoria Heights administrative assistant Rick Williams. "He was here for a semester," said Williams. "He was good, very attentive, and eager to learn. He had a keen desire to pursue a career in public service and worked on a couple of projects that helped me a lot. He wrote a grant, did a good job on it, and it was funded. He also worked in the personnel area and worked on our first-ever merit-wage program." **Strohl** uses Williams as a resource, and there are times, joked the Heights employee, when "I feel like a lending library."

West Peoria, he said, is so new it is still building up its own stock of resource material. That could account for the fact **Strohl's** office is not lined floor-to-ceiling with books. In fact, his office -- a desk, phone, files, computers, and the all-important copy machine -- is quite well-organized and is shared with city clerk Guydeen Roos.

City Hall is sandwiched between a free-standing automotive store and an Oriental market. The market and city hall share the same building, originally constructed to house a variety store. The

# **Section 10**

## Internet – Newspaper Archives Searches David A. Strohl

(Articles are in reverse chronological order)

city half had served as an insurance office and a polling place for residents, who proudly called themselves West Peorians long before the 11/4-square-mile area was incorporated. "West Peoria," **Strohl** said, "is a very unique community. It's so close to a major urban area but has its own identity. Even before it became a city, you knew the people were from West Peoria."

Administering a small city, said **Strohl**, is different than administering a large municipality. "I provide professional staff support and guidance on various policy issues to the mayor and City Council." He helps the clerk, too, said Roos. "Any question I ask, he always has the answer." As part of his job description, **Strohl** also serves as deputy city clerk, which enables him to take over when Roos is called away from the office. "I'm happy where I am," beamed the young administrator. "This job offers a variety, and I like this community." However, he added, "At some point, I'd like a staff and have more of a leadership position, but over the next few years, this position could develop. "

## Internet – Newspaper Archives Searches David A. Strohl

(Articles are in reverse chronological order)

The Peoria Journal Star (IL) April 2, 1995

# Secrecy Charges Shake Up New City>'Hidden Agenda' Allegations Fuel Interest in West Peoria's First Municipal Election

Author: Mark Fitton

Has West Peoria city government become an exclusive club for eight or nine members? Or have a discontented city official or two gone political at election time and accused their brethren in an attempt to sway the electorate? In this city of about 5,500, incorporated in 1993 and facing its first municipal election, the answer may depend on who's asked.

In either case, interest in the West Peoria elections appears extraordinarily high. The town is taking on the appearance of an election-sign pincushion, and a recent candidates night drew about 200 people. One alderman Dan Kerns, one of eight aldermen appointed by a residents committee when West Peoria incorporated, gets either the credit or the blame for shaking things up.

Kerns was the principal source for a story in the March issue of the Community Word, a small newspaper circulated in the Peoria bluff areas. In that story and in interviews since, Kerns alleges that most city officials -- Mayor Bryant DeFrance, the seven other voting council members and the city clerk -- have adopted a "hidden agenda" mentality and mode of operating.

That mode, Kerns and others argue, is marked by secret meetings, minutes of proceedings that don't accurately reflect events, and rushing decisions through the voting process without adequate public notice or public input. Kerns is supported on certain specifics by Treasurer Mike Mohr, who months ago announced he wouldn't seek election.

The accused incumbents, who have formed the West Peoria Good Government Political Action Committee, have written their own response, which PAC members said will be mailed to voters. They call Kerns' allegations "baseless, slanderous or at very least a distortion of the truth." Illegal meetings? Kerns says several council members and their spouses regularly go to Donnelly's Campus Town Bar & Grill for dinner after City Council meetings. He suspects they discuss city business. As evidence, he points to a December 1993 gathering at Donnelly's that he attended. Kerns says besides himself, Mayor DeFrance, council members Linda Capps, Verne Powley, Joe Cooper and Chuck Howard, City Clerk Nancy Powley and then-City Attorney Sandra Birdsall were there.

Kerns says talk was "at first, chit-chat, but pretty soon turned to discussion of city business." Specifically, Kerns says, talk turned to items including liquor-license holders, performance bonds and annexation, with Birdsall giving advice on annexation. Kerns said he became so uncomfortable that he made notes when he got home. Later, he says, he privately spoke to fellow council members and expressed his discomfort. He says he was met with a nudge- wink attitude. Dissatisfied, Kerns says he later gave copies of the Illinois attorney general's booklet on the

## Internet – Newspaper Archives Searches David A. Strohl

(Articles are in reverse chronological order)

Open Meetings Act to each council member.

Others have a different impression of that dinner gathering. Birdsall, who has since left the law firm that represented the city for another job, is among them. "No, absolutely not," Birdsall said when asked if she'd ever been at what she considered an improper or illegal meeting. Birdsall says she would have followed her duty to warn West Peoria officials if they were crossing a legal line. She says her talking about annexation was in response to someone's question, "What is annexation?" and involved her answering with tales of her own experiences as a former village president. Birdsall, who said she'd attended several post-meeting dinners, said, "There was never anything relating to any specific project."

DeFrance says he doesn't believe city officials have violated the law, or the public's trust, while socializing. "We have been places together, in the same room or at the same table, and there's maybe a couple people talking back and forth about a subject, but as far as the whole table collaborating, no," the mayor said. The mayor, other aldermen and Birdsall question Kerns' motive for publicizing -- a month before the election -- his interpretation of a December 1993 event. "Dan's simply doing this to dig up dirt," Alderman Mark Lang said.

Kerns says the election is incidental to the issue: "Let the chips fall where they may. If I don't get sent back to the council, so be it. I'll be able to get up in the morning and look in the mirror and know I did the right thing." The issue will get another look -- this one from the Peoria County State's Attorney's Office.

Chris Fredericksen, chief of the civil division, said that a complainant on March 24 brought in a picture of a group of elected officials engaged in what are alleged to be violations of the Open Meetings Act. "We are looking into it," Fredericksen said. The state's attorney's office does not reveal the name of complainants in such cases, he said. Matter of minutes Kerns and others argue that minutes of City Council proceedings often are so cleansed of anything that might appear "negative" or cause "bad press" that the record does not reflect what happened. Critics say the minutes are especially lacking when it comes to recording public input.

The PAC members disagree, saying minutes routinely go beyond what the law requires. Lang said Kerns likes more verbiage than do the clerk or most committee chairmen, and the debate amounts to a matter of preference. Kroll takes it a step further, saying he believes some people expect nearly verbatim accounts in the tradition of township annual meetings. Politically, "we're not children anymore," Kroll said. "It's an adult thing now." But Kerns and others say there's a pattern. They cite a failure by the council to promptly review and release closed-session minutes, failure to publish public safety committee reports that include crime breakdowns and failure to approve City Council workshop minutes until forced. Further, Kerns says it took floor discussion by the council to get copies of minutes available for the public at meetings and a subsequent public demand by Mohr to make copies of his treasurer's reports available to the audience.

The most striking example of an abbreviated official account of a meeting is the Nov. 1, 1994, land use committee meeting. About two hours of public comment on potential building codes, much of it critical, was recorded by committee chairman Howard as, "Balance of meeting we

## Internet – Newspaper Archives Searches David A. Strohl

(Articles are in reverse chronological order)

took comments from the public. "Howard, according to several people, later explained at a council meeting that the public comment was "just too negative."

DeFrance and others point out that Howard had to run the committee meeting, interact with residents and be responsible for the minutes. They say perhaps Kerns should have volunteered to take minutes, as he would later do, or perhaps Howard should have appointed someone to the task. DeFrance, who initially opposed amending those minutes, said that he now agrees with Gary Dutro, president of the West Peoria Residents' Association, who urged the council to include more documentation of public sentiment. Hidden, rushed? Perhaps the biggest criticism of the current council is what opponents say is, at best, a tendency to rush decisions without enough public input and debate or, at worst, an attitude that the council will achieve its agenda regardless of public sentiment.

One of the most visible incidents cited by critics is the hiring of City Administrator **David Strohl** on Sept. 13, 1994. No one seems too publicly critical of **Strohl's** qualifications or performance. Instead, they point to the way the 24-year-old master's degree student was hired as a part-time administrator at \$9,000 per year. (His pay has since been raised to \$11,000.) The night **Strohl** was hired, discussion of a city administrator was not on the agenda. Kerns says the first he learned of the subject was 10 minutes before the council meeting began.

That evening, the council effectively added the subject of hiring a city administrator to its agenda; passed an ordinance, written by **Strohl**, that created the job; interviewed **Strohl** in executive session; and hired him. DeFrance, most agree, had done some homework. **Strohl**, who holds a bachelor's degree in political science, was finishing grant work for Peoria Heights at the time and working part time in the county personnel department. In addition to speaking to **Strohl** and checking his references, DeFrance had **Strohl** interviewed by Robert Wright, a former Peoria city manager. **Strohl** was hired by a 6-2 vote, with Kerns and Kroll casting the "no" votes.

Kroll says he agreed with the need for the position but voted no because he felt rushed. "In retrospect, it came out OK," he said, adding that the debate in executive session was open and thorough. Kerns still has problems with the manner of hiring. Kerns said there was no previous public discussion at a full council session to benefit either the council or the public. He also says he didn't like making the leap from introducing the subject to hiring an administrator in one night. Plus, Kerns says, the position seemed open only to a single candidate, without the city having done any shopping.

Although DeFrance acknowledges he may have rushed a bit, he and supporters say hiring **Strohl** was a matter of unique opportunity, rather like finding the perfect fit at a bargain price at the right moment. Lang also says the position had been discussed for two months in the finance committee. DeFrance and supporters point out that **Strohl** already has "more than paid for himself" by finding for West Peoria \$12,000 in franchise fees now going to Peoria County. However, Kerns continues to raise the question of conflict of interest. **Strohl** still works part time for Peoria County.

Strohl supporters say he isn't privy to information in his county personnel-office job that he

## Internet – Newspaper Archives Searches David A. Strohl

(Articles are in reverse chronological order)

could use in his West Peoria job. West Peorian and County Board Chairwoman Sharon Kennedy isn't so sure. Kennedy said she has asked the state's attorney's office for an opinion on whether **Strohl** has a potential conflict. Kennedy, it should be noted for the record, is one of mayoral candidate Jim Dillon's campaign managers. Fallout What's been the fallout for West Peoria city government? First, Kerns has become the odd man out among voting council members. Kerns, who acknowledges his disagreements with the other incumbents are largely about how to conduct business, said that he can live with that because he tried to bring about change on and off the council floor before airing his views in the press.

For his part, Treasurer Mike Mohr is leaving government. He cites burnout that he says is partially attributable to the way the council handles itself. Most members of the City Council, he said, seem to have an agenda. Mohr's opinion is that if those members "feel the public might not be in favor or that they will be stalled by public debate or dissension, then put it through some other way." "I don't like behind the scenes stuff at all. This stuff gets to me," said Mohr. "That's why I'm bailing out now." The other incumbents feel differently.

Lang, for instance, doesn't think the council made mistakes on the issues Kerns raises. Nor does he think there's a group agenda or pack mentality. "I know these people; they're not a voting bloc," he said. Kroll says he feels the council may have made some "very minor mistakes" on certain matters, but he scoffs at the idea of collusion. He, in fact, argues the strength of the PAC incumbents is their ability to disagree and still work together. DeFrance said maybe he moved too fast on a few matters, but he contends the "openness" issue is essentially a political attack. If the buzz around West Peoria is any indication, the electorate that came out in force to approve incorporation may return and let its city officials know what it thinks.

## Internet – Newspaper Archives Searches David A. Strohl

(Articles are in reverse chronological order)

The Peoria Journal Star (IL) September 22, 1994

# New City Hires Young Administrator>West Peoria Employs ISU Graduate Who Will Start on Master's

Author: Mark Fitton

The young city of West Peoria will soon have a young city administrator. As a result of a 6-2 vote Sept. 13, **David Strohl** will join the city payroll in early October. **Strohl**, 24, works part time for the Peoria County personnel department and is administering a grant for Peoria Heights. He will work from three to five hours a day for the city of West Peoria at an annual salary of \$9,000, Mayor Bryant DeFrance said. **Strohl**, 24, earned his bachelor's degree in political science from Illinois State University and will soon start work on a master's degree, he said.

**Strohl's** duties will be nearly all-inclusive, DeFrance said. "For the most part, he'll be an assistant to me and the council and help us run the city." Among those duties will be researching and preparing ordinances, working with council committees, and working with such agencies as the Tri- County Planning Commission, the Economic Development Council, and the state's Department of Commerce and Community Affairs. "I'm impressed with the help we're going to get," DeFrance said. "We've taken care of the things we've absolutely had to, and now it's time to move forward. I think this (hiring) will really help us."

**Strohl** said he wants to make a career of public policy work and thought the West Peoria job presented an interesting entry-level opportunity. "It's not often you get to be involved with a new city, and I'm looking forward to being right in the middle of it. I think it will be a great growth experience for West Peoria and for me."

West Peoria voters approved incorporation in November 1993. Dan Kerns, one of the aldermen who voted against the hiring, said he was opposed because the council received the ordinance to create the administrator's position only a few minutes before the meeting. Further, Kerns said, an executive session at the Sept. 13 meeting was the first time he and most aldermen had met **Strohl**. Kerns said he would have preferred the council been involved in the selection process earlier and not been presented with only one candidate on the evening of the hiring. "I'm not against hiring a city administrator so much as I am the fashion in which it was gone about," Kerns said.

## Internet – Newspaper Archives Searches David A. Strohl

(Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **David A. Strohl** is listed below.]

Peoria Journal Star, The (IL) July 31, 1994

## ILLINOIS STATE UNIVERSITY NAMES 1,300 HONOR STUDENTS

Author: City Desk News

NORMAL -- More than 1,300 students were named to the dean's list at Illinois State University. Area students include:

Peoria:

David A. Strohl,

## Internet – Newspaper Archives Searches David A. Strohl

(Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **David A. Strohl** is listed below.]

The Peoria Journal Star (IL) April 28, 1994

## **Peoria County Roundup**

Author: Unknown

PEORIA HEIGHTS VILLAGE BOARD The Peoria Heights Village Board took the following action at its April 19 meeting:

\*Established a merit wage review. "Employees will now be evaluated on their performance rather than giving all employees the same percentage of merit pay," said **David Strohl**, assistant village administrator. "If a person has an outstanding performance, he would get more merit pay than someone with a lesser rating. Before, everyone got the same percentage."

\*Authorized the hiring of Gordon Sweetland Certified Public Accountants of Peoria to conduct the village's annual audit through 1996.

\*Received an \$11,600 grant from the Illinois Department of Commerce and Community Affairs to refurbish restrooms in village hall in order to make them more accessible for handicapped people.

\*Approved the rezoning of a parking lot at 206 E. Duryea from residential to business. The parking lot is owned by Peoria Heights Bank. Peoria Dist. 150 The District 150 School Board approved a locker search policy Monday night that does not require probable cause or a search warrant.

Before the vote, J.D. Wheeler, president of the Peoria Chapter of the American Civil Liberties Union, objected to the policy and asked board members to reconsider their positions. Wheeler said the policy is a "full-scale abandonment of the rights of the Fourth, Fifth, Sixth and Eighth amendments." These are rights Americans have fought for and died for, Wheeler told the School Board before it voted unanimously in favor of the stricter policy. The School Board also learned that the last day of school will be June 6, an extension of the school year to make up for two snow days when school was canceled.

The district will again hold summer school for high school students who have failed a course and for students in sixth through eighth grades who need to pass the Minimum Competency Test. However, because the district does not receive reimbursement from the state, tuition will be charged. A contingent of parents addressed the School Board about large class sizes ranging up to 37 students at Calvin Coolidge Middle School. Mark Lang, parent of two children at the school, said a D.A.R.E. officer walked out of an unruly classroom there two times. "If an officer of the law can't keep their attention, how can we expect teachers to? " Lang said.

## Internet – Newspaper Archives Searches David A. Strohl

(Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **David A. Strohl** is listed below.]

Peoria Journal Star, The (IL) March 1, 1992

### ILLINOIS CENTRAL COLLEGE NAMES HONOR LIST STUDENTS

Author: City Desk News

EAST PEORIA -- A total of 153 students have been named to the President's list at Illinois Central College for achieving a 4.0 grade point average. Area students are:

Peoria:

David A. Strohl,

## Internet – Newspaper Archives Searches David A. Strohl

(Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **David A. Strohl** is listed below.]

Peoria Journal Star, The (IL) July 21, 1991

### ILLINOIS CENTRAL COLLEGE NAMES HONOR ROLL STUDENTS

Author: City Desk News

A total of 171 full-time students have been named to the president's list for achieving a 4.0 grade point average at Illinois Central College.

Area students are:

Peoria:

David A. Strohl

Research Compiled by: Amanda Dillabough

Colin Baenziger & Associates



J. Mark Rooney

# Belle Isle City Manager Candidate Report

e.

# Section 8

# TABLE OF CONTENTS

|                         | PAGE |
|-------------------------|------|
| COVER LETTER AND RESUME | 1    |
| CANDIDATE INTRODUCTION  | 9    |
| BACKGROUND CHECKS       | 19   |
| CB&A REFERENCE NOTES    | 27   |
| INTERNET SEARCH         | 43   |

# Cover Letter and Resume

The Honorable Nicholas Fouraker 1600 Nela Avenue Belle Isle, FL 32809

Dear Mayor Fouraker & City Council,

I am excited to apply for the position of City Manager. I believe that my unique background and breadth of experience will fit your needs and enable me to transition seamlessly into the Belle Isle community. I have held leadership positions in organizations with a range of 40 to 3,000 subordinates. My combined experience managing people in the municipal sector and in the U.S. Army has given me a unique perspective on leadership in diverse, challenging environments and on managing projects from \$5,000 to \$50 million dollars. I am confident in my ability to facilitate successful intergovernmental consensus, as I have negotiated over 60 in my career. I have consistently worked in ethnically diverse communities with a broad range of businesses, housing options and neighborhoods. I have a great deal of experience promoting an inclusive and open minded community. My varied experiences demonstrates a high level of competence in managing all aspects of local government from a complex urban environment to a stand alone, tourist focused community that expands from a picturesque New England community of 25,000 to 52,000 every summer.

The varied positions and roles I have held in local and federal service will allow me to adapt my leadership and management style to address Belle Isle's day-to-day operations as well as your goals and priorities. I have extensive experience with high quality residential, retail and commercial economic development. The conversion of Fort Sheridan to civilian use has given me a keen sense of the impact on a community's identity when experiencing major economic and rapid population growth. I gained insight into the importance of updating the comprehensive plan to guide and foster consensus with residents and major stakeholders in the community.

I have had a successful record in financial management, particularly in the areas of budgeting and Capital Improvement Programs (CIP). During my tenure at the Village of Wheeling, the Village contracted and completed a new Village Hall, Fire Station, Public Works facility and completely renovated the Police Station. All projects were completed on time and within budget. The general fund had a surplus of over \$18 million dollars when I left the position of Village Manager. Working in conjunction with the Finance Director, Human Resource Director and labor attorney, I was able to address the expense side of our structural deficit due to the 2008 recession, by eliminating 45 positions. This was accomplished without any termination related lawsuits or union grievance filings. Early in my tenure at the Village of Carpentersville I relied on that experience to address Carpentersville's structural deficit by eliminating 25 positions and converting 15 full-time positions to part-time status. The reductions allowed the Village Board to devote funds to the Capital Equipment Replacement Fund (CERF) and the CIP. The general fund

increased from \$3.3 million to \$9.6 million due to significant sales tax growth as a result of successful economic development efforts, over seven years.

I have been fortunate throughout my career to work with councils that work collaboratively with staff in setting strategic and community objectives as well as organizational goals and priorities. This allows me, as City Manager, to build a culture of organizational excellence built on trust. I look forward to an opportunity to meet with you to discuss how I can utilize my can-do attitude, knowledge and expertise to be the transformative, visionary leader that will achieve measurable outcomes. I manage by empowering senior staff to utilize innovation and best practices. I lead by example. I focus on an organizational culture where department heads collaborate, as they have trust in each other and know that I will reward calculated, well planned risk taking in the furtherance of project completion and team and organization development. I set and communicate clear expectations and provide feedback and guidance and hold the organization and myself accountable in meeting the organization's goals and priorities established by the annual budget and the strategic comprehensive plan. I believe in and cultivate a culture of candor. In an era of volatility, uncertainty, complexity and ambiguity, the resulting chaos demands a very different skill set to manage projects and processes and to lead people. What sets me apart from my peers is an awareness of the importance and the ability to not only lead but to develop leaders at all levels in the organization. I believe having a sense of humor is an integral part of the art of leadership as is a positive attitude balanced with humility and a commitment to empowering, delegating and celebrating the accomplishments of staff and elected officials. Thank you for your consideration.

Sincerely,

#### e.

#### J. MARK ROONEY

2 RONAN ROAD · HIGHWOOD · IL · 60040

847 · 525 · 0829 jmrooney7@gmail.com

#### PROFESSIONAL EXPERIENCE

### Village Administrator, Round Lake Beach, IL

Sep 2021 - present

Chief Executive Officer for a suburb located 39 miles north of Chicago with a diverse population of 30,000. FY 2022 overall budget of \$40M, 82 FT and 22 PT employees. Responsible for 5 operating departments.

#### Accomplishments:

- Issued \$10M of new debt, at an interest rate of 2.95%, to complete Village goals for infrastructure improvements, primarily replacement of 80 year old water mains.
- Facilitated the completion of a revision to the Village's Building Permits and Code Enforcement process.
   Created "Get to Yes" vision for staff to implement Village goal of being business friendly.
- Worked with the Village Board and staff to develop a \$1.5M plan, utilizing the American Rescue Plan Act funding to create an outdoor concert venue and renovate the Village Cultural Center.
- Reduced cyber risk by implementing new hardware and software changes along with major changes to
  protocols for external and internal system access.
- Successfully secured \$2.75M grant from DCEO-STOCIP that will address storm water flooding. Began
  process to remove impacted taxpayers properties that require FEMA mandated flood insurance.
- Worked with County Administration to implement framework to establish County wide dispatch for Fire/ EMS and Police.

#### Town Manager, Westerly, RI

May 2018 - Sep 2021

Chief Executive Officer for a coastal community located 2.5 hours from New York and 1.5 hours from Boston, with a population of 25,000 residents / 50,000+ summer months. Home to magnificent beaches, including Watch Hill. Westerly's thriving tourist economy supplements a healthy mix of commercial and residential tax base exceeding \$6.5B in EAV. Responsible for ten operating departments. FY 2019/20 overall budget \$98M. 180 FT and 70 PT town employees, with an additional 350 school employees. Accomplishments:

- Achieved certification in Rhode Island's municipal Resilience Program, a community focused process to
  assess current hazard and climate change impacts and vulnerabilities, due to storm surge and sea level rise.
  One of the first three in the state.
- Assisted policy makers in establishing Plastic Committee. Established plastic bag ban by 2020. Became leader in state to reduce use of plastic straws and utensils in all coastal establishments.
- Established Town's first Capital Equipment Replacement Fund (CERF) and other GFOA best management practices to prevent downgrade of Aa2 bond rating.
- Received first GFOA Distinguished Budget award.
- Implemented E-permitting system to reduce zoning and building permit wait time by four weeks for major projects.
- Lead negotiator for all collective bargaining units, Police, Public Works and clerical staff.
- Initiated process to redevelop closed mill site with US EPA grant funding to make site suitable for redevelopment, creating 45 immediate jobs and potential for over 100 jobs by 2022.
- Worked with staff and Town Council to pass a \$15M referendum for infrastructure improvements.
   Utilized Rhode Island infrastructure bank and saved over \$1M in bond and interest cost over the life of the bond.
- Managed \$15M capital improvements to town roads. Worked out a decade old dispute between the States of Connecticut and Rhode Island to rebuild a bridge destroyed by Hurricane Sandy in 2008.
- Applied and received \$2M federal dollars to dredge sand from inter-coastal pound damaged by Hurricane Sandy to restore salt marsh and provide beach nourishment on Atlantic Ocean beaches.

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#### J. MARK ROONEY

#### PROFESSIONAL EXPERIENCE

Accomplishments:

- Coordinated the completion of a Harbor Management Plan that had languished for 15 years. Resulted in approval by both the Army Corp of Engineers and the Rhode Island Coastal Resources Management.
- Facilitated an agreement with the Rhode Island Department of Environmental Management to improve the management of traffic, parking and trash at state and town beaches utilized by over 10,000 people every weekend from Memorial Day to Labor Day.
- Completed Comprehensive Plan and Zoning Map (1998). State requires every ten years. Last completed in 2006.
- Reorganized Animal Control and Town Dog Pound. Worked collaboratively with nonprofit agencies to reduce operating deficit by \$150K.
- Implemented a third-party billing and scheduling system to reduce police details and overtime by over \$500K in the first year. Increased third-party collections rate by 50%
- · Increased grants from less than \$250K to \$2M

### Village Manager, Carpentersville, IL

Sep 2010 - Jan 2018

Chief Executive Officer for a suburb located 32 miles northwest of Chicago. 39,000 residents. FY 2017 overall budget of \$65M, 178 FT and 42 PT employees. Responsible for seven operating departments. *Accomplishments:* 

- Oversaw the creation of 4 new TIF districts; maintained positive and collaborative intra-governmental relations with impacted tax districts: schools, park and Kane County.
- Negotiated a \$4.3M TIF incentive to bring a \$25M Wal-Mart Super center. (185,000 sq ft and gas station). Generates additional \$1.2M sales tax, \$80K local gas tax and \$650K property tax for the Village.
- Implemented a "priority-based" budget process which resulted in the Village adopting 7 successive balanced budgets with no reduction of service levels and a \$9.7M General Fund balance as of December 2017, a \$6.6M increase from 2010.
- Implemented the reorganization of 9 operating departments to 7 in 2011, resulting in the elimination of 25 full-time and 15 part-time positions resulting in annual savings of \$1M.
- Coordinated the completion of a comprehensive revision of the Village economic development process.
   Created "Get to Yes" operating slogan to implement Village Board goal of being business friendly.
- Negotiated a new, solid waste contract with a private sector company. Saved the Village \$1M over a 5-year contract term by implementing curbside solid waste and recycling containers.
- · Managed the construction of a \$13M, 120,000 sq ft Public Works building and \$2M Village Hall rehab.
- Worked with staff and financial consultants to upgrade the Village's bond rating to AA2.
- Received the Illinois Public Employer Labor Relations Association 2011 James Baird Leadership
  Award. One of three communities nationwide to receive the National Public Employer Labor Relations
  Association 2012 Pacesetter Award for the Village's leadership and innovation in collective bargaining.
  Collectively the agreements saved the Village over \$250K by healthcare and step pay plan changes.
- Increased transparency rating by IPI, an independent watchdog agency, from 46% to 96%.
- Negotiated 12 intergovernmental agreements with various government entities.
- Initiated the Village adopting the Greenest Region Compact 2 to address and act on common public
  policy issues and multi-jurisdictional challenges regarding sustainability and environmental stewardship.

### Chief of Staff, North Chicago, IL (non-ICMA recognized position)

Nov 2009 - Sep 2010

Chief of Staff for a suburb located 35 miles north of Chicago. Diverse population of 36,000. Home to the Naval Station Great Lakes, Rosiland Franklin Medical Center and Abbott Laboratories. FY 2009/10 overall budget of \$37M. Reduced \$2.3M deficit to \$650K.

#### J. MARK ROONEY

#### PROFESSIONAL EXPERIENCE

#### Village Manager, Wheeling, IL

Oct 2006 - Oct 2009

Chief Executive Officer for a suburb located 25 miles northwest of Chicago. 36,000 residents. Extensive industrial and office parks bring the daily population to over 100,000. FY 2008 overall budget of \$96M, 260 FT and 45 PT employees. Municipal board member of the Northwest Water Commission. Representative to Solid Waste Agency of Northern Cook County, SWANCC. Member of the Board of Directors of the Chicago Executive Airport, the third busiest airport in Illinois.

#### Accomplishments:

- Maintained Wheeling's AA+ Fitch Investor Services and S&P AA bond rating.
- Manage the \$25M construction of a 48,000 sq ft Village Hall.
- Demonstrated the cost savings of "Design Build" \$13M, 48,000 sq ft Public Works building; \$6.2M, 24,000 sq ft Fire Headquarters facility; \$5.1M, 48,000 sq ft renovation of Police Station and 911 Center. Total savings exceeded \$3M.
- Implemented two new TIF districts and negotiated an 11-year extension of an expiring TIF.
- Negotiated Village purchase of over 30 retail properties, totaling in excess of \$15M to accomplish
  downtown redevelopment plan. Increased EAV over \$50M.
- Negotiated with Village of Wheeling Park District and Metropolitan Water Reclamation District for the storage requirement of Levy 37, on the Des Plaines River to prevent regional flooding. Created a Forestry Division within Public Works; Managed by certified arborist.
- Created an Information Technology Department; Implemented GIS via an intergovernmental cooperative agreement with 12 communities.
- Negotiated IGA between Wheeling and the Cook County Forest Preserve to create a unique prairie restoration, canoe launch and bike/jogging trail.

## Assistant Village Manager, Wheeling, IL

Mar 2003 - Oct 2006

#### Accomplishments:

- Lead negotiator for all collective bargaining agreements (Police, Fire and Public Works).
- Initiated request for a "special census" to ensure recent growth from new construction and annexation
  would be reflected in state revenue sharing figures and utility taxes. \$3M, 6-year, projected fiscal impact.
- Applied and received \$240K Brownfield Grant from IEPA.
- Negotiated exclusive waste hauler contract. \$175K annual franchise payment to Village.
- Negotiated a \$22M TIF incentive for a \$110M, 412 room Westin Hotel, retail and restaurant complex.

#### City Administrator, Highwood, IL

Feb 1996 - Mar 2003

First City Administrator in Highwood's 112-year history. Located 28 miles north of Chicago. 5,600 residents. Responsible for all aspects of City administration and policy implementation.

#### Accomplishments:

- Redevelopment of Fort Sheridan, a former Army base identified for closure under BRACC in 1988 and
  closed in 1992. Served as Highwood's chief negotiator in the redevelopment of Fort Sheridan from
  a former military facility to a premiere residential community. Preservation of unique historical and
  environmental features, which include 92 buildings listed on the National Historic Register and the
  restoration and conservation of its natural beauty and 2-miles of public beach access.
- Efforts recognized by the Illinois Planning Association in conjunction with the City Manager of Highland Park. Received award for historic preservation and adaptive reuse.
- Negotiated over 40 intergovernmental and developer agreements. Worked effectively with various levels and departments of government, i.e. Departments of Defense, Army and Navy, U.S. Senate, U.S. Congress, State of Illinois, Lake County, Cities of Highland Park and Lake Forest and 5 nonprofit organizations that held land interest on the closed military base.

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# **Section 8**

#### J. MARK ROONEY

#### PROFESSIONAL EXPERIENCE

Accomplishments:

- Managed \$4.9 capital improvements to the City's water treatment plant and associated infrastructure to include a new, 1 million gallon water tower.
- Negotiated model agreements for telecommunication providers, which generated over \$400K annually.
- Improved service by contracting with the City of Lake Forest.

#### Staff Assistant to Senator Paul Simon

June 1992 - Feb 1996

 Achieved bipartisan consensus to facilitate the passage of Senate and House Bills which resulted in the redevelopment of Joliet Arsenal, Fort Sheridan, Glenview Naval Air Station and Rantoul Air Base.

#### United States Army Officer, Lieutenant Colonel, Retired

Nov 1983 - June 2014

Active Duty

1983 - 1991

Reserve Duty

1991 - 2014

Held positions of leadership and responsibility in domestic and international locations, including Germany, South Korea, East and West Africa. Graduated from military schools with emphasis on leadership, problem solving and cohesive team building skills. Possessed top-secret and compartmental security clearance.

Desert Storm

Oct 1990 - June 1991

Saudi Arabia, Iraq & Kuwait

#### Operation Iraqi Freedom

Feb 2005 - June 2006

Iraq

Senior Advisor for Military Transition Team (MiTT)

#### Awards

Awarded the Bronze Star with V-device for valor, Combat Action Badge.

#### EDUCATION & CERTIFICATIONS

Graduate of Command & General Staff College, Ft. Leavenworth, KS Civilian equivalent to Master Degree in Leadership Management

Northern Illinois University, DeKalb, IL

Completed all coursework for Master of Public Administration

University of Nebraska, Lincoln, NE Bachelor of Science, Economics & History

#### AWARDS

- ILCMA Special Service Award for Service to the Profession.
- Labor Relations and Collective Bargaining:

IPELRA - Leadership Award 2011

NPELRA - Pacesetter Award 2012

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# Candidate Introduction

### **EDUCATION**

Bachelor of Science, University of Nebraska, Lincoln, NE

Completed Coursework for Master of Public Administration, Northern Illinois University, DeKalb, IL

Civilian Equivalent to Master in Leadership Management, Command & General Staff College, Ft. Leavenworth, KS

## **EXPERIENCE**

| 0 | inistrator, Round Lake Beach, IL<br>175 Full time/22PT w/5 direct rep | orts Budget \$41M w/ \$28M | Oct 2021 – present<br>1 Gen Fund |
|---|---|----------------------------|----------------------------------|
| U | er, Westerly, RI<br>ummer 52k 180 FT/75 PT w/12                       |                            | ay 2018 – Sept 2021<br>Gen Fund  |
| U | ager, Carpentersville, IL<br>178 FT/42PT w/7 direct reports           | \$65M/\$30M Gen Fund       | 2010 – Feb 2018                  |
|   | f, North Chicago, IL<br>172 FT/18 PT w/4 direct reports               | \$37M/22M Gen Fund         | 2009 – 2010                      |
| 0 | ager, Wheeling, IL<br>260 FT/45 PT w/8 direct reports                 | \$96M/54M Gen Fund         | 2003 – 2009                      |
| • | strator, Highwood, IL<br>41 FT/18 PT w/ 7 direct reports              | \$28M/24M Gen Fund         | 1996 – 2003                      |

## **BACKGROUND**

Aging infrastructures are the primary issues facing the Village of Round Lake Beach. The Village has an older section of the community of pre-WWII summer cottages, that became year-round homes without being built to standard building code, nor with adequate sized or quality watermains for the current built-out density. The high failure rate and emergency repair costs necessitate their replacement. Yet, the political challenge of the lower valued properties being primarily Hispanic owned and viewed by the mayor as a drain on the newer higher valued homes presents a challenge of equity. Staff and I utilized the EPA revolving Loan program at 2% interest to address the problem without dramatically raising water rates. I secured a \$2.75 M

grant (with a \$75,000 match), that will address storm water flooding, due to disrepair of a 1930's era channel.

The Town of Westerly was founded in 1669. It occupies 35 square miles and possesses 9 miles of some of the most scenic and popular beaches in New England. Westerly has a permanent population of 25,000 and a summer population of 52,000, with an additional 10,000 day visitors in the summer. Westerly's thriving tourism supplements a commercial and residential tax base exceeding \$6.5 billion in EAV.

### **Major Challenges in Westerly:**

Tourism: The need to coordinate with State Agencies to manage and mitigate the impacts of peak weekends of 10,000 day visitors to the quality of life of permanent and seasonal homeowners. This includes ability of existing wells during drought conditions meeting summer demands, and traffic impacts primarily on the weekends and summer Holidays. The discovery of PFOS & PFAS near one of the Town wells with the highest capacity at a closed textile mill threatened future growth, which necessitated working with State and Federal agencies to address the issue.

Budgeting for and maintenance of infrastructure and facilities: The Town lacked both a Capital and CERF plans. I incentivized the existing Finance Director to retire and hired an experienced Finance Director who was instrumental in gaining both staff and elected officials buy in to correct these deficiencies. We were able to issue two separate bonds totaling \$18 Million by voter referendum.

Emergency Preparedness: Oversaw the final changes and updates to replace a 15-year-old manual. The focus on hurricane preparation and recovery, proved beneficial as we experienced a Category-1 Hurricane and fortunately the eye passed over the Town and the heaviest damage was to our north. My insistence that active shooter training be added was proved necessary within months.

COVID-19: The State and the Governor's "LOCKDOWN" was a stark contrast to my use of the Executive-authority granted to me by the Town Council.

My first action was to close Nursing homes and congregant settings to the Public; to include mitigation steps for the workers of the facilities. Westerly suffered zero Covid deaths with over 350 occupants vs a State wide death rate that exceeded 60%.

I deemed all Town Staff as "essential workers" and I set the goal and established the standard of "open to the Public" and allowed wide latitude on how that was accomplished by department. I collaborated with staff and allowed Departments to propose the manner and method open for business would look like, as Public Safety personnel tolerance for 'risk' is far higher than a clerk in vital records.

I opened access to Beaches almost immediately and explained to the Governor's office that I would not Order our Police Officers to cite or block people from walking on a beach. After the State opened Liquor stores- I allowed takeout orders from restaurants and eventually authorized liquor to be sold by beach side bars and restaurants, an activity prohibited by the Town since 1978.

I coordinated with the school Superintendent & Police Chief to create an alternate 2020 High School Graduation. at the Town Beach Drive-Inn. Students were filmed receiving their diplomas in a controlled setting; then at the Town Beach Drive-Inn family and friends honked and applauded from their cars. It took 2-evenings due to the number of students and families, but we made it happen.

Administered 50k shots at the only municipal Vaccine Clinic in the State. Staff and I modified EMA planning documents to coordinate citizen Volunteers and the Yale New Haven Hospital staff and the School Nurses and the Rhode Island Pharmacy school volunteers.

### GENERAL MANAGEMENT STYLE AND EXPERIENCE

I recognize that I have the responsibility to (1) create and foster an organizational culture and environment in which trust is valued; (2) to be a role model for integrity and honesty in all professional interactions and encounters. (3) Collaboration is key to achieving a healthy organizational culture. I work closely with staff, empowering them through clear direction and expectations and the metrics success will be measured. I mentor staff and develop them by giving them opportunities to succeed and learn from mistakes, so they will be self-motivated, innovative and entrepreneurial, in their approach to problem solving. (4) I do not rely on my position and title for my authority, as compulsory compliance is far less effective than voluntary commitment. I manage by seeking input, options and feedback and I integrate their views into our plan. I believe there needs to be a discussion on the "why", the meaning and purpose of a project and the desired outcomes. I provide the vision and guidance and give wide latitude on how and by what means staff adapts and adjusts their efforts to changing circumstances, as people are far more motivated when given autonomy to achieve the desired outcome, without being **micro-managed**. My core philosophy and direction to my direct reports is we **manage projects** but we **lead people**.

Elected officials would state that (1) I am a proactive, results orientated problem solver. (2) I collaborate with staff to present all reasonable options for council consideration and direction. (3) Politically astute but apolitical, while I always execute the will of the majority on a given issue, I never dismiss the viewpoint of the minority members of the council. (4) I respect the line between the policy maker and the staff role of executing and implementing the priorities of the council.

Staff would state that I am (1) fair and consistent and respectful of others (2) That I am decisive in action and deed under pressure and that I never pass blame onto staff and publicly recognize their accomplishments. (3) I emphasize the importance of developing a positive organizational culture that identifies and nurtures potential leaders. Succession planning and training is not just for senior level positions. (4) That I fully embrace and model the public SERVICE nature of my role.

My greatest weakness was a lack of patience and tolerance for individuals with issues of character. The biggest mistake in my career led me to improving my management style and relationship skills. I used sharp and dismissive language, in a public setting, when a candidate for trustee, who was facing domestic violence charges, made a scurrilous charge about my integrity. I held myself accountable by participating in a training seminar conducted by Psychiatrist Dr. Morrison, the leader of the Midwest Leadership Institute, meets monthly with City Managers who work in the Chicago suburbs to discuss "Understanding Human Motivation and Leadership for City Managers". I participated in a critical strengths assessment and discovered that my weakness was that I can be excessively competitive and focus on task completion over relationships. My strength of managing and dealing with ambiguity and goal accomplishment needed to be tempered with building relationships in order to be a better City Manager. I am keenly aware and thoughtful of how my mood and attitude impacts others. Each day as I get out of my car and walk into the office I consciously consider the analogy "what weather am I bringing". I place a premium on developing and nurturing relationships and have developed habits to ensure that I focus on relationship building. Thus, I make a point to meet one-on-one with every elected official and Department Head monthly to obtain personal feedback as well as discussing status of goals and projects. I know that "active listening" is both a choice that must be made and a skill/habit that must be continuously developed to be effective.

My greatest strength is an optimistic attitude as it is a force multiplier in conveying my vision for a better future or that change can be positive. I possess a reservoir of "grit and resiliency" that provides me the ability to handle and deal with adversity in a calm deliberate manner. I attribute this quiet confidence to my years in the Army and the training and experiences it provided.

I use the City Council's goals and objectives to form the basis for both budget preparation and a means to benchmark and set the metrics by which Department Heads and I evaluate their performance annually at the conclusion of the annual City budget process. Then we work together in an iterative discussion of the resources required for the subsequent years goals and convey this in the budget document for the Council's discussion and consideration. I have learned to balance quantitative measurement with qualitative, as there is a vast difference between measuring efficiency and measuring effectiveness. Efficiency is a measure of how much each unit of output costs. Effectiveness is a measure of the quality of that output; how well did it achieve the desired outcome. When we measure effectiveness, we know whether our investment is worthwhile. There is nothing so foolish as to do more efficiently something that should no longer be done or does not fit Council priorities and organizational goals.

Yet, like most government organizations, in the early part of my career I focused on the inputs: how much time is spent on a program or a department, the cost of overtime by department, how many people were served, and what service was received. This is helpful information and required for political accountability and transparency. Yet, as my staff and I developed greater skills we adapted our metrics to focus on outcomes and the results of our processes, so we could demonstrate annually at budget hearings how dollar inputs and staff time tied to policy goals and objectives. For example, in community development, rather than measuring customer satisfaction we often measured the administration process, i.e. how many permits were issued, how fast were the permits issued. Although, these process outputs are useful metrics they do not measure the policy goal of "improved customer satisfaction."

This led to One of my successes that I am very proud of, and utilized in subsequent cities I have served. Providing staff my vision and collaborating with them to internalize the concepts behind the slogan of "Get to YES" as an over-arching vision and guidance to the customer service positions through-out the organization. In deference to building code officials and fire inspectors we added an important caveat of, do not ignore the imperative of life safety provisions. This vision transformed a bureaucratic mindset tethered to rules and "this is how we have always done it"- to that of an engaged problem solver. Employee morale improved as well as the satisfaction of citizens and stakeholders as measured by surveys and feedback received by the council. Front-line staff were empowered to help applicants with forms rather than just accepting paperwork, or taking payments or logging complaints or service requests in the Public Works department. It is my firm belief that most employees are not the problem as the vast majority are dedicated, talented people who are trapped in bureaucratic systems that were designed for the industrial era, that frustrates their creativity and saps their morale, and absolutely frustrates citizens and stakeholders perpetuating a dim view of government. It is my responsibility along with senior leaders to redesign systems and procedures and rules that incorporates and utilizes 21st century technology, (a simple example is e-permitting), to meet the needs of our customers.

I have terminated over 50 individuals, between my public sector and military careers, for cause or as a result of budgetary necessity. I have never outsourced this responsibility to the HR Department. I firmly believe that terminations must be done with care, respect and dignity for the impacted employee, and the organization. It is never about me, but the individual who is being fired. My focus is having a process that is respectful and professional. I seek to have empathy for the individual and their situation.

The challenges I see facing Belle Isle are the *opportunities and why* I am interested in the position professionally. I am that candidate *who has a library of solutions* and a demonstrated record of success addressing the issues as outlined in the recruitment brochure:

- Growth /Annexation: both improving the quality of life of the community and the tax base without substantially increasing the demand on town services.
- Infrastructure: Work with staff and consulting engineers to quantify the problem, the financial costs and options for a stand-alone Police Station and City Hall or a combined

- facility. Land availability may be the deciding factor, but in my experience a combined facility is the cost-effective option.
- Personnel: Staff retention is a problem shared by many communities in high growth states like Florida and Texas and are not unique to Bell Isle. I would look to partner with neighboring communities to cost chare high demand and scarce available professionals. More importantly implement personnel policies to reflect current employee expectations to become more flexible with work hours and remote options when possible.
- Funding: Work with the Finance Director and Department Heads to quantify future costs
  to meet defined commission service levels and provide the Commission with "options" to
  fund current operations or explore possible changes to both expenses and revenues of
  Town operations.
- Noise and Quality of life impacts of proximity to Airports is an issue I have worked on twice in my career and the need to collaborate with the Airport management team to implement positive changes that can make a difference to residents is why I love local government. Yet, not all issues can realistically be resolved to the expectations of every critic, but I have found with respectful dialogue and truly listening to their concerns the anger and frustration can be decreased.
- Crime: I have always worked collaboratively with the police command team to solve and
  mitigate resident and business concerns, with a successful record of working with
  neighboring jurisdictions and the county Sheriff to address common problems. I firmly
  believe in the use of technology of Cameras and license plate readers to deter and
  successfully prosecute crime.

#### During my first six months I would:

- Have conversations with the Council as a whole and individually to listen and understand current situations and establish short-term (1<sup>st</sup> year) goals as well as mid-term (2-5 years) goals.
- Meet with the Florida ICMA Senior Advisors and the City Attorney to familiarize myself with relevant laws and City codes prior to my start date. Especially, those related to annexation.
- Ask the acting Manager and Department Heads to prepare an orientation binder for me. I would ask them to include the following items: 1. Information about the organization: people and projects. 2. Departmental goals, objectives and responsibilities. 3. Key policy documents. 4. One-page analysis, by Department, of their strengths, weaknesses, opportunities and challenges. 5. I would solicit suggestions about community leaders and stakeholders I should meet, from the departmental perspective. I would review the list with the Council to gain their insight. I would review this binder often to gain context about both the organization and community.

I have extensive experience with both local and major newspaper reporters. I have been interviewed by all the major networks that serve the Chicago and Providence, RI media markets. (NBC, ABC, CBS, Fox and WGN) I always defer to the Mayor before I assume the role of spokesman. No community activist expected. Although, I am not on any *personal social media* accounts, with the exception of LinkedIn. I have worked extensively with a dedicated staff member and the Police Chief via official social media accounts and City WEB page to inform the public about projects and events and any first responder activities. For the past 5- years I have issued press releases via email and social media.

I am an avid runner and biker. I have always enjoyed sports fishing and look forward to the largemouth bass opportunity. I enjoy reading autobiographies of historical figures.

### SIX ADJECTIVES OR PHRASES I WOULD USE TO DESCRIBE MYSELF

- Approachable- ability to relate to and engage respectfully with people from every walk of life
- Can-do-Spirit-with thick skin and accepts critical feedback with humility
- Innovative with entrepreneurial mindset (nonbureaucratic)
- Tactful and genuinely authentic leader; uses restraint and humor while obtaining results
- Reputation of candor and integrity
- Leader who inspires trust and builds collaborative teams and breaks down silos

### REASON FOR DEPARTING PAST POSITIONS

CARPENTERSVILLE: The former Fire Chief, who I dismissed for lack of integrity and his repeated verbal intimidation of women, became Village President. The unexpected death of my strongest supporter and the resignation of a second to take a job out of state, resulted in the appointment of two supporters of the Fire Chief, to the Council, and I was terminated the very same week.

WESTERLY: I loved the beauty of the Atlantic and New England, but after Covid and the inability to travel back to my children who were in College and completing H.S. caused me to prioritize family. (Yet, at this point in 2023 my two oldest have completed college and have joined the Army and my daughter is in her Senior year of college.)

ROUND LAKE BEACH: I am grateful for the opportunities Round Lake Beach has provided me, however the position has become routine and I realize that the mayor and I are a bad fit. Having earned my Illinois municipal retirement, my goal is to take advantage of that financial security and seek opportunities that align with my personal values over the next decade of my professional career.

# J. Mark Rooney

I have a strong desire to work and live in a community that values strong leadership and appreciates the collaborative partnership between its City Manager and the community. My extensive experience in negotiating over 60 intergovernmental Agreements (IGAs) will be immensely valuable in addressing budget and service level challenges while prioritizing the City's objectives. Throughout my career, I have been passionate about capital infrastructure projects, despite the stress of financing, managing timelines, and mitigating construction impacts on businesses and residents. The satisfaction of working with staff and elected officials to achieve the end product in deeply rewarding, as it embodies the Athenian Oath's spirit of civic duty – leaving the city greater and more beautiful for future generations. I am passionate about city management because it allows me to transform the vision and dreams of elected officials and community stakeholders into reality. Building upon my past successes, I am confident in my ability to enhance customer service focus and boost morale among frontline staff in your organization. As a leader, I will make a positive contribution to both your community and organizational culture. Belle Isle presents a tremendous opportunity for me to be part of a thriving organization and community, where I can contribute and be inspired by the vibrant culture of this special place.

### **CURRENT / MOST RECENT SALARY**

Westerly \$176,000 and Round Lake Beach is \$193,500.

# CB&A Background Checks

# **Background Check Summary for JAMES "MARK" MARK ROONEY**

#### **Criminal Records Checks:**

Nationwide Criminal Records Search No Records Found

County

Lake County, IL

Washington County, RI

Kane County, IL

Cook County, IL

No Records Found
No Records Found
No Records Found

State

Illinois No Records Found Rhode Island No Records Found

#### **Civil Records Checks:**

County

Lake County, IL

Washington County, RI

Kane County, IL

Cook County, IL

No Records Found
No Records Found
No Records Found

Federal

Illinois No Records Found Rhode Island No Records Found

**Motor Vehicle** 

Illinois No Records Found

**Credit** Excellent

Personal Bankruptcy No Records Found

Sex Offender Registry

Not Listed

**Education** Confirmed

**Employment** Confirmed, except for Round Lake

Beach, IL (09/2021 – Present)

Social Media Nothing of Concern Found

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# **Section 8**

# **Background Check Summary for JAMES "MARK" MARK ROONEY**

Under the Fair Credit Reporting Act, 15 U.S.C. 1681-1681Y, credit and bankruptcy information are very sensitive and should not be used be in the consideration of hiring. The information is included for each candidate because we do not want you to be surprised if third parties raise what they consider to be a concern. Also, some states have limited the reporting to seven years, so any records older than that will not be available in those states. In addition, motor vehicle reports are limited to three to seven years, depending on the state.

## Background Check Summary for JAMES "MARK" MARK ROONEY Personal Disclosure

## Personal Disclosure Questionnaire

| Name                               | of Applicant: J Mark  | Rooney   |
|------------------------------------|---|--|
| backg<br>elimin<br>and th<br>compe | round. Please answer them<br>nated from all further searches<br>nat charges do not mean you w | ned so that we will be able to make full disclosure to our client concerning your honestly. Cutting corners or misrepresenting your past will result in you being conducted by this firm. We understand that frivolous charges are sometimes made ere guilty. We also understand that you may have been wronged and needed to seek that we want to be certain that our client is fully informed. If you have any fication. |
| Please                             | e explain any yes answers on  | a separate sheet of paper.   |
| 1.                                 | Have you ever been charged  | or convicted of a felony?  |
|                                    | Yes   | No.  |
| 2.                                 | Have you ever been accused  | of or have been involved in a domestic violence or abuse incident?   |
|                                    | Yes   | No No  |
| 3.                                 | Have you ever declared bank   | kruptcy or been an owner in a business that did so?  |
|                                    | Yes   | No   |
| 4.                                 | Have you ever been the subj<br>lawsuit?   | ect of a civil rights violation complaint that was investigated or resulted in a   |
|                                    | Yes   | No   |
| 5.                                 | Have you ever been the subj   | ect of a sexual harassment complaint that was investigated or resulted in a lawsuit?   |
|                                    | Yes   | No   |
| 6.                                 | Have you ever been charged<br>Yes   | with driving while intoxicated?  |
| 7.                                 | Have you ever sued a curren   | t or former employer?  |
|                                    | (Yes)   | No   |
| 8.                                 | Please list links to all your s<br>personal web page if you ha                                | ocial media accounts (Facebook / Instagram / LinkedIn / Twitter, etc.) and your ve one.  |
| 9.                                 |   | r background that, if made public, would cause you, our client or our firm light through the press or any other mechanism?   |
|                                    | Yes   | <del>N</del> 0   |
| 10                                 | Please provide a list of any  | lawsuits in which you are or have been a party either as plaintiff or defendant.   |
|                                    |   | Attested to: Signature of Applicant  |
|                                    | e e   | y Signature of Applicant   |

Please email this form via PDF DOCUMENT to Monique@cb-asso.com or via fax to (561) 621-5965 no later than 5:00 PM MST 05/15/2023.

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# **Section 8**

## Background Check Summary for JAMES "MARK" MARK ROONEY Personal Disclosure Explanation

#### **Personal Disclosure Questionnaire**

Name of Applicant: J. Mark Rooney

Please provide a list of any lawsuits in which you are or have been a party either as plaintiff or defendant.

Jim Kelly – A former Village of Wheeling Building Inspector sued over his dismissal in 2008. The Village settled on the eve of the trial in 2013 to avoid further legal costs as advised by the insurance carrier.

Nannette Burns – A former Village of Carpentersville finance employee sued over her dismissal. The insurance carrier for the Village, over the objections of the Village Board, forced settlement as the case would exceed Village SIR.

J. Mark Rooney – Filed a lawsuit against the Village of Carpentersville for breach of contract and violation of the Illinois Wage Payment and Collection Act. (see attached letter from Walsh Law Group, P.C.)

Nancy Markey – A former Town of Westerly human resource employee sued over her dismissal. The insurance carrier recommended settlement as the settlement cost was less than Town SIR.

#### Background Check Summary for JAMES "MARK" MARK ROONEY Personal Disclosure Explanation

## WALSH LAW GROUP, P.C.

WWW.THEWALSHLAWGROUP.COM

CHICAGO OFFICE: 30 S. WACKER DR., STE. 2200 CHICAGO, ILLINOIS 60606 PHONE: (312) 466-7683 FACSIMILE: (312) 466-5601 GENEVA OFFICE: 21 N. FOURTH STREET GENEVA, ILLINOIS 60134 PHONE: (630) 457-4242 FACSIMILE: (630) 262-0644

June 17, 2020

Mr. Colin Baenziger Colin Baenziger & Associates 2055 South Atlantic Avenue Suite 504 Daytona Beach Shores, FL 32118

Re: J. Mark Rooney Application

Dear Mr. Baenziger:

My office represented Mr. J. Mark Rooney ("Mr. Rooney") with respect to his separation from employment from the position of Village Manager with the Village of Carpentersville ("the Village") on January 24, 2018. I was asked to provide an explanation of that litigation in support of his application to be the City of Brighton's City Manager. I have reviewed extensive documentary evidence including emails, meeting minutes, memos and performance reviews and interviewed numerous witnesses about the circumstances of his separation. Based upon that review, I can say without reservation that all of Mr. Rooney's performance evaluations had been excellent and he had always performed his duties beyond the expectations of his supervisors.

In 2016, Village President John Skillman was the Village's Fire Chief. At that time, the Village commissioned a lengthy investigation into his management style. Based on the results, he was allowed to resign from his position as Fire Chief in lieu of termination. In April 2017, Mr. Skillman was elected Village President. Not long after his inauguration, Mr. Rooney learned through a co-worker's complaint that President Skillman was referring to a trustee and a trustee's spouse gender-specific derogatory names. Upon receiving the complaint, Mr. Rooney commissioned a brief investigation, which substantiated the claims. Mr. Rooney then insisted that President Skillman apologize to the complainant to defuse the situation. After apologizing, President Skillman told Mr. Rooney, "when I get the votes, I'm going to have you terminated for embarrassing me."

On December 5, 2017, due to one trustee retiring and another passing, President Skillman was able to appoint two allies and create a majority bloc on the Village of Carpentersville Board of Trustees ("the Board"). President Skillman called a special meeting on December 12, 2017, at which time President Skillman announced his intention to terminate Mr. Rooney.

Page | 1

### Background Check Summary for JAMES "MARK" MARK ROONEY Personal Disclosure Explanation

Mr. Rooney's employment with the Village was governed by an employment contract, executed on August 31, 2010 and amended two times thereafter (collectively, "the Agreement"). Section 4 of the Agreement was entitled "Severance Compensation." Section 4 (a) provided that "If Rooney is terminated as Village Manager by action of the Village President and Board of Trustees for any reason other than conviction of a felonious act, the Village shall continue to pay Rooney his then current salary and fringe benefits for a period of...nine (9) months after five years of service." Section 4(b) provides "In the event the Village and Board of Trustees take action at any time to reduce Rooney's salary and/or fringe benefits in a greater percentage than an applicable across-the-board reduction for all employees of the Village, or...refuse, following written notice, to comply with any other provision herein benefitting Rooney, or in the event that Rooney resigns subsequent to a suggestion, formal or informal, by the Village President and Board of Trustees that he resign, then Rooney may, at his option, be deemed to be 'terminated'...and shall receive severance compensation in accordance with the provisions of Section 4(a) of this employment agreement."

As noted above, on December 12, 2017, President Skillman sought to terminate Mr. Rooney's employment in large part as retaliation for investigating a female staffer's complaint about President Skillman's disturbing language. In furtherance thereof, the Village and Board of Trustees offered a separation agreement to Mr. Rooney, with a deadline for acceptance of January 4, 2018 at 12:00 p.m. Mr. Rooney declined to execute the agreement. Shortly thereafter, and upon learning Mr. Rooney had declined to execute the separation agreement, President Skillman notified Mr. Rooney that he intended to terminate him on Saturday, January 6. President Skillman then called a special meeting for Saturday, January 6, 2017.

The agenda for the January 6, 2018 Special Meeting was for "Possible Action by Board on the Removal of a Specific Employee or Execution of a Separation Agreement." Mr. Rooney and his representative David Limardi were present for the meeting. While the Board was in closed session, then-Village Attorney Steve Elrod stepped out of the meeting and asked Mr. Limardi if he could speak with him privately. Mr. Elrod said that the Board and Village President wanted Mr. Rooney to go on leave while the parties discussed separation. Based upon that representation, Mr. Elrod and Mr. Limardi devised a plan whereby Mr. Rooney would be placed on involuntary leave but would continue to get paid through exhaustion of his sick, vacation and personal time while the parties attempted to negotiate a separation agreement and ultimately end his employment on March 30, 2018. The Board approved of the plan and Mr. Rooney was notified by Mr. Elrod and President Skillman that he was being placed on leave, effective immediately. I have personally reviewed documents and emails indicating the same. Indeed, Mr. Rooney was paid consistently with the agreement for the next three weeks.

Monday, January 8, 2018, would have been Mr. Rooney's next regularly scheduled work day had President Skillman and the Board not placed him on leave. At 8:20 a.m., more than thirty minutes before Mr. Rooney's customary start time, President Skillman sent out an email noting "Mark Rooney will not be back to the Village." On January 9, 2018, then-Village Attorney Hart Passman sent two emails to Mr. Limardi with suggestions of how to communicate Mr. Rooney's status. The first suggested "Mark Rooney is out sick with a back injury. Marc Huber is acting manager in his absence." The second email suggested "Manager Rooney and the Village are working out a mutual separation agreement. In the interim, Manager Rooney is on vacation, and Assistant Manager Marc Huber is responsible for all day-to-day affairs of the Village." It is clear that no one in the Village believed that Mr. Rooney abandoned his position. Moreover, President Skillman would not have

### Background Check Summary for JAMES "MARK" MARK ROONEY Personal Disclosure Explanation

known that Mr. Rooney would not be back to the Village on the morning of January 8, 2018 if he hadn't placed him on leave.

On January 16, 2018, the Village and Board of Trustees again met with the purpose of proposing a third "Resignation Agreement and General Release." The agenda for the January 16, 2018 meeting read "Action by Board on the Removal of a Specific Employee or Execution of a Separation Agreement." During the meeting, the Board voted to approve an amended separation agreement for Mr. Rooney. The consideration for the separation agreement was only a fraction of what Mr. Rooney was contractually entitled to if he were separated from employment involuntarily. Mr. Rooney declined to accept the proposed agreement. On January 20, 2018, the Board met again and approved another agreement with amended language. On January 22, 2018, Mr. Rooney notified the Village that he declined the offer.

Upon learning that Mr. Rooney declined to accept a separation agreement, President Skillman immediately called for another special meeting. The agenda for the January 24, 2018 special meeting again read "Possible Action by Board on the Removal of a Specific Employee or Execution of a Separation Agreement." At that meeting, the Village and Board of Trustees terminated Mr. Rooney by characterizing his involuntary leave as abandoning his position. This was an obvious legal fiction created in an attempt to circumvent the Village's contractual obligations pursuant to the Agreement.

Mr. Rooney was undoubtedly "terminated" under Section 4(a) or (b) of his employment agreement. The motivation for his termination was solely President's Skillman's vendetta against Mr. Rooney as a result of embarrassing himself, not anything that Mr. Rooney did. Mr. Rooney had an excellent reputation in the Village as well as among his colleagues. His unfortunate termination was the result of an impulsive and inexperienced individual, not misconduct and certainly not job abandonment.

On June 20, 2018, my office filed a lawsuit on Mr. Rooney's behalf against the Village of Carpentersville for breach of contract and violation of the Illinois Wage Payment and Collection Act after attempts at informal resolution failed. In December 2019 and after very limited discovery, Carpentersville agreed to settle the lawsuit with Mr. Rooney. The litigation is concluded and the claim has been dismissed, with prejudice. Please understand that Mr. Rooney is not litigious. He had no choice, however, to enforce the contract that he bargained for to obtain the benefits for which he had provided significant consideration. It would be my pleasure to provide any further information available to assist Mr. Rooney with job placement.

| Regards,              |    |
|-----------------------|----|
| WALSH LAW GROUP, P.C  | ١. |
|                       |    |
| By:                   |    |
| Patrick J. Walsh, Esq |    |

cc: J. Mark Rooney

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# CB&A Reference Notes

#### Ed Morrone – Former Town President, Town of Westerly, RI 401-932-4768

Mr. Morrone was on the Council that hired Mr. Rooney and he did a remarkable job. Westerly is a tight Italian generational community, and it is not easy to assimilate in a place where everyone knows everyone, and they are all related. Hiring him was a leap of faith, but Mr. Morrone sensed something in Mr. Rooney during the interview process and was never disappointed with the selection. Mr. Rooney became so much a part of the community.

Before you can be a good manager, you have to be a good person and Mr. Rooney was. A mechanic in the public works department was killed on the job shortly after Mr. Rooney was hired, and he found out after his plane landed in Illinois to spend Christmas with his family. He hopped on the next plane back, and never went home to his family that Christmas. He and the Police Chief went to the home of the family to console them. He could not have been more warm, gentle, and caring had he been the manager of Westerly for years, which speaks highly of him. He made a wonderful mark with his performance, his empathy, and his ability to assimilate in the community. He was not perfect, and he had some rough edges but the human part of him and his loyalty is extraordinary.

Since Mr. Rooney was not able to return home for Christmas after the accident, Mr. Morrone invited him to spend Christmas with their family. While there, Mr. Rooney noticed the volunteer fire fighters preparing to protect the community from stray fireworks and walked over to shake everyone's hand and thank them for being there on a holiday. He was authentic and had a great perspective from his military experience. He could not be intimated, but he had an affinity for the community and the residents cared about him.

When hiring, Mr. Rooney fully vetted the candidates, but some applicants do not always show their weaknesses in the process. He kept the Council informed and worked with them as a team, and he did not favor individual members. He anticipated as much as he could and then moved forward to accomplish much.

A pond in Westerly was decimated and ruined by hurricane Sandy and the dredging was stuck in the permitting process. Mr. Rooney led the process to move 35 cubic yards out of the pond in the dead of winter. Once the pumps were turned on, they could not be turned off because they would have frozen. The process was fascinating, and he handled it well.

The constitution in Rhode Island guarantees access to the beach for residents. For decades the topic has been contentious. Mr. Rooney led the process to determine right of way and had the area surveyed and marked so there would be no question in the future. Some of the paths were overgrown or blocked by fences and he led the process very well. The end product was successful though it was not easy working with wealthy individuals who think they own the water. Another instance of his problem-solving ability involved a veteran's group that was fractured. He brought them together to resolve the issues.

Mr. Rooney and the Police Chief had an exceptional relationship and worked extraordinarily well together. They faced a host of recurring issues related to covid with closures and restrictions to bars and businesses. They were timely in submitting reports to the state and the Department of Health. Their vaccination program was excellent, and they vaccinated hundreds of residents seamlessly. They utilized the senior center, staff and more to accomplish the goal. They pulled together and the effort was the pride of the community. As an added challenge, their governor was appointed to a federal board but did not relinquish control, so the Lieutenant Governor's hands were tied. As such, Westerly could not depend on state assistance, but they still moved forward through Mr. Rooney's guidance. He showed great leadership and received only praise for his handling of the vaccine process. He was fearless in an unprecedented and uncertain time.

Mr. Rooney handled the City's finances like his own, he was very astute. Their bond rating is on the way up and he did not overextend the community. He worked very well with the finance director and planned for the future. He was respected by everyone, even those who may not like him personally. He was hands on and worked with staff in the trenches. He led by example. He was very loyal to the community and rode on police boats on weekends to monitor the harbor as part of the mooring and safety program.

One fourth of July weekend Mr. Rooney picked up Mr. Morrone and they drove all over town to talk to business owners in the beach area. In the 45 years that Mr. Morrone has been in business, no town official ever stopped to talk to him on a holiday. Extend yourself and people respond, and the word gets around. Actions like this are why Mr. Rooney is so well respected. He is professional and has so much going for him.

Mr. Rooney has done so much for the community and moved them forward kicking and screaming at times. He brought them through controversy successfully. One such issue related to roads the City plowed for years even though they did not own them, and another was related to a bond issue. Everyone in the community loved him because he was committed to the job and the safety of the community. He was not only respected in the community, but also in the state. Any community would be well suited to have him.

Mr. Morrone has tremendous respect for Mr. Rooney and misses him both personally and professionally. He did a wonderful job in Westerly and is a good family man.

#### Words or phrases used to describe Mark Rooney:

- Devoutly religious,
- Caring father,
- Laughs easy and appropriately,
- Still knows how to have fun,
- Humble and
- Loyal friend.

**Strengths:** Committed and loyal, extends himself, does what is right for the community,

professional.

Weaknesses: None identified.

#### Lisa Pellegrini – Former Development Services Director, Westerly, RI 860-227-9057

Ms. Pellegrini has known Mr. Rooney since 2018 and reported directly to him until 2021. Mr. Rooney was an excellent manager. Communication was a two-way street and they were good at keeping the other informed.

Hiring decisions made by Mr. Rooney were excellent and he made good decisions in general. He thought outside the box and was very innovative. His vast experience was helpful, and he understood the basics of town government as well as the nuances of each community he serves. He easily identified key individuals to work with him, which was a gift. He knew how to assess the task and put the best group together to complete it.

Immediately upon arriving in Westerly Mr. Rooney was very active in meeting everyone and talking to them, and he continued to be active in the community. He met with various groups to establish communication and was very effective. When covid first hit, he realized they could not shut down completely or they would lose that personal connection. Westerly was one of the few towns that stayed open, but he was also very sensitive to residents who were uncomfortable or at high risk and found ways to safely connect with them. He hired employees who were good at making those personal connections. The executive team interacted together, and their projects coordinated with each other. He effectively overcame the silo mentality that existed when he arrived to create a very interactive group. He empowered Directors to make changes in their department for the good of the organization. Working with him was a wonderful experience.

The Town had been working on their comprehensive plan for ten years when Ms. Pellegrini was hired, and it fell under development services. The Council seemed afraid to make any decisions before adopting the plan, so they created many different committees and bypassed the planning Board. Mr. Rooney held meetings and really listened to the obstacles that the senior leadership team was facing. He identified two members of the Council to bring into the process and helped everyone realize that the planning commission needed a new Chairman. Once the new Chairman was in place, they were able to complete the comprehensive plan. Mr. Rooney is extremely supportive not only to the Council members but to the staff and the public. When residents were abusive in public meetings, he remained positive and did well in his approach to them. Another issue was when some wanted to remove the Columbus statue in town. He kept everyone calm and helped diffuse the situation. The statue remains and everyone is calm.

Mr. Rooney is absolutely customer service oriented, and he has excellent financial skills. To relieve stress, he exercises. When upset, he stays very cool but is direct, so you know what the issue is. Working with him is refreshing as compared to a manager who is passive aggressive and

will not tell you what the issue is. He talks to staff about any issues and expects them to fix it but will assist if they are having any trouble. When they need guidance, he breaks down the situation to help them determine how to move forward, rather than taking over. He has an excellent leadership style, most likely from his military career.

Everything in Westerly is controversial. The former HR director blamed Mr. Rooney for something related to covid that was not his fault, everyone in the organization feels that the accusations are unfounded. Nothing in Mr. Rooney's background would embarrass an employer.

Ms. Pelligrini would hire Mr. Rooney and his departure was a significant loss. When Ms. Pellegrini's parents both died in a short time frame, he encouraged her to take time off. He cares about the staff. He is an excellent and dedicated manager.

#### Words or phrases used to describe Mark Rooney:

- Fearless.
- Extremely dedicated,
- Very loyal,
- His word is his bond,
- Fiscally conservative,
- Compassionate,
- Very willing to mentor staff, and
- Very seasoned.

**Strengths:** Unifies everyone in one direction, keeps everyone in sync, encourages discussion

and working together to accomplish crazy impossible things, excellent leader.

**Weaknesses:** At times he can expect much and perhaps moves at too fast of a pace. However,

you can tell him you need to slow down a little and he acknowledges it. He is just

on overdrive most of the time and has an enormous amount to do.

#### Dyann Baker – Former Finance Director, Town of Westerly, RI 401-348-2548

Ms. Baker reported to Mr. Rooney from 2018 to 2021. Mr. Rooney was financially astute and helped Ms. Baker assimilate to the municipal environment because she came to Westerly from a non-profit organization. He provided good leadership while she worked through the nuances of public finance. He was very supportive of high performing employees.

Finding good talent willing to work in the public sector can be difficult. Mr. Rooney often could not hire the best person for the job because the Town could not pay them what they are worth. He does the best he can within the financial limitations of the organization. His decisions in general are good.

Mr. Rooney was very much about change and improvement, and he was a very communityoriented person. He attended community meetings and interacted well with the public. He understood the nuances and tried to understand the concerns and the sticking points. He worked to maintain relationships in the community.

Considering his schedule, Mr. Rooney kept everyone informed to the best of his abilities. He had to be reminded at times, but he really did the best he could. He was stretched even further in Westerly because they did not have a public works director for most of his tenure and he ran that department as well as the Town.

Due to the nature of finance, Ms. Baker and Mr. Rooney met one on one, but he truly helped to resolve any issues. During stressful circumstances he was very fluid, but he also showed great strength. The only time his stress elevated slightly was when his leadership was challenged.

Westerly has had a few controversies, one that involved a lawsuit. Some in the organization may have a different opinion of Mr. Rooney because there are differences of opinions about styles. Some employees may feel put upon because his expectations are high.

Ms. Baker would hire Mr. Rooney, he is a good manager. He did a tremendous job in Westerly, particularly for a person running a town while their family lived in a different state. He worked very hard for their community.

#### Words or phrases used to describe Mark Rooney:

- Strong,
- Knowledgeable,
- Employee centered,
- Financially astute, and
- Very taxpayer and citizen oriented.

#### **Strengths:**

Very strong in finance, provides good leadership, supportive of high performing employees, understands when to be hands off and when to be involved with department heads.

Weaknesses: He allows his emotions to get in the way at times. For example, he is very loyal to the organization and staff. He wanted to reward employees with compensation equal to job performance, which was difficult for the Council to approve given the pandemic. As such, there was tension and emotion in the room.

## Reference Notes J. Mark Rooney

#### Kay Teeter - Former Trustee, Carpentersville, IL 847-894-8804

Ms. Teeter was a Village Trustee for ten years and worked with Mr. Rooney as the Village Manager for five of them. She has served on the Business Development and the Planning and Zoning Commissions since she left the Board.

In terms of job performance, Mr. Rooney was on point. They did not hire him because they wanted people to like him, although he was a nice person. Change was absolutely necessary for Carpentersville. Staff had not been held accountable by the previous manager. Hiring was done based on who you knew, and the previous manager was personally doing some of the work that employees did not know how to do. They conducted an intensive interview process because they needed a change agent who could sustain a high-performance group. They selected Mr. Rooney and he was the right person for the job.

Mr. Rooney came in and mentored some of the employees and they improved so they are still with the organization. Some were already doing well, and he solidified them. When employees left or were not performing, he helped identify the qualities needed for that position, so they hired the right person to replace them. He always did what needed to be done. He made good decisions because he always focused on what was good for the whole and not one single entity.

Mr. Rooney attended every community event and many of the community meetings. When interacting with the public he was very friendly, open and approachable. He greets people with respect and listens to their comments and concerns. He is very good about keeping the Board informed and he meets deadlines.

The departments were not working well together which made community development very challenging. Developers and business owners met with one department and were given a to-do list. When they completed that list, they went to the next step and were given a second list, etc. The back and forth was incredibly frustrating for them. Mr. Rooney helped the departments put a master list together while putting the right staff in place, even if it meant moving employees around. He balanced out the issues and helped the departments work together. When someone wants to do something in the Village, every department that needs to be involved in that particular project is sitting at the table for the very first meeting. It has not only streamlined the process but has made it very customer friendly. The changes are significant and wonderful.

The person who owns the business that employs the most residents would not do any economic development in Carpentersville because the departments gave him grief and the process was not defined. He was very critical of their organization and took his business to surrounding communities. Since the change in the process, he is doing business development in Carpentersville and he speaks well of the City. He has seen the leadership of Mr. Rooney and is now willing to invest in the community.

The public works department had not been remodeled since the 1950's. The plan to remodel it received much pushback from the community, but Mr. Rooney guided them through the process

and helped them see the vision. Since the project has been completed, the residents are so excited about the changes, even those who complained in the beginning. The right thing to do is not always the easy thing, but Mr. Rooney can always discern the right thing to do and work in the right direction. He brought the project in under budget because he utilized the staff for the project when he could. With the money saved, he did an expansion and redevelopment of their City Hall which had not been updated since the 1970's. He helped the Board see the possibilities when they could not envision them. Mr. Rooney realizes that investing in the staff is beneficial and helps the organization to be more efficient. The end result has been wonderful.

The Village had never saved for capital purchases and projects before Mr. Rooney was hired. He put money aside every year so that when they need to buy a fire truck or ambulance, or need to paint the water tower, the funds are already available.

The Village had full time and part time firefighters. The part time fire fighters filled in the gaps and are cost effective because they do not require benefits. The full timers try to get rid of the part timers to increase their own pay by demanding that all firefighters have the same education level. Rather than dismissing the part time fire fighters, Mr. Rooney and the Board worked with the part timers to increase their education. An additional benefit is that they are able to step into a full-time position as openings occur. The full timers went public with allegations that Mr. Rooney was against fire safety and claimed he was a detriment to the community. The situation was very controversial but none of what they claimed was justified or accurate. Ms. Teeter is not aware of anything controversial in Mr. Rooney's history.

Ms. Teeter would hire Mr. Rooney. He was a great leader for Carpentersville, he did the job that needed to be done.

#### Words or phrases used to describe Mark Rooney:

- Driven,
- On purpose,
- Open,
- Futuristic, and
- Visionary.

#### **Strengths:**

He looks at a situation from both perspectives because he is very objective, but he does have a heart. He sees what changes need to be made and what strengths the organization already has. He was very good at working through the process and provided the Board with enough information to make educated decisions.

Weaknesses: He has a military background and at times can be more focused on the task at hand rather than being warm and fuzzy. He is very personable, but he is also strong willed which is not a bad thing if it is channeled in the right direction. He is sometimes so passionate, and he could be softer when presenting his ideas.

#### Dean Argiris – Former Village President, Wheeling, IL 847-845-6990

Mr. Argiris has known Mr. Rooney since 2003. Mr. Arigis was a Trustee when Mr. Rooney was the Manager. Mr. Argiris was an aggressive Trustee who was always suggesting ideas, Mr. Rooney always found ways to accomplish them. They had a great relationship.

Mr. Rooney was a hard worker and a smart person. He was very good and dedicated to his field. He liked challenges, which was a good thing. Each of the Trustees has a different personality and he worked well with all of them.

When hiring personnel Mr. Rooney made good choices and they were happy with his selections. His decisions in general are good, he was very focused on the job. He answered the phone, even late at night on the weekend, and communicated well. He quickly supplied any information they requested. He managed 245 employees, worked with the unions and managed the TIF districts, which was a significant undertaking. He worked seven days a week and did well.

Because of the climate in Illinois, Mr. Rooney was always looking for ways to save money and find new revenue sources. He was always trying to keep businesses in the community and was really good at growing the community and maintaining services.

Mr. Rooney attended City events and other events like Chamber meetings. They held some fundraisers, and he was always in attendance. When in the community he has a great personality and the gift of gab. He can speak to anyone.

Keeping the Board informed was a mandate and Mr. Rooney did well. The elected officials created the vision, Mr. Rooney made sure the vision was set forth in the organization. He knew how to address hair brained ideas and suggested better ways to get to the end result. He listened and researched options. The residents gained a sense of pride by his example.

Schools, libraries, and parks were against TIF districts but the only way the Village could fund economic development was to create them. Mr. Rooney met with supervisors from the taxing bodies to explain why the district was important and how it would benefit their organization. He assured them that it was the right choice because he knew that they all had to work together. They now have five TIF Districts. One expired after lying dormant for twelve years because of the past administration. Mr. Rooney declared a surplus to expand the District, which is now bringing in some nice revenue. He was very creative.

During Mr. Rooney's tenure, they had to lay people off and teach employees to multitask. The situation was challenging but he was able to lead the organization while keeping the funding in place and their bond rate consistent. They received financial awards during his tenure. He was creative in refinancing the bond debt. He saved millions by changing from a 5% interest rate to a 2% interest rate. He is very skilled with finances and was very instrumental in what they were able to accomplish.

## Reference Notes J. Mark Rooney

Mr. Rooney is visionary and always looks ahead. He is very transparent. He has a good head on his shoulders. If he has a Board who supports him and a good team to work with, he will thrive.

Before he came to Wheeling Mr. Rooney was involved in a controversial situation involving the union members who were backed by lobbyists. He did what was right for the community. He left Wheeling after a new Mayor was elected who decided to go in another direction. It was based on politics and not on Mr. Rooney's job performance. People were happy with him, and it was unfortunate that politics interfered.

Mr. Argiris would hire Mr. Rooney, he is a good Manager.

#### Words or phrases used to describe Mark Rooney:

- Good personality,
- Military background,
- No nonsense approach,
- Leads by example,
- Fun to be with socially,
- Creative, and
- Innovative.

**Strengths:** Good personality, separates the politics and dealt with each of the seven board

members well. Good work ethic, just a great Manager.

Weaknesses: In Wheeling he was a bit of a micro manager. However, Mr. Argiris knows

employees in Carpentersville, and they have confirmed that Mr. Rooney has

improved in this regard.

#### Mr. Pat Horcher – Village President, Wheeling, IL 847-331-4234

Mr. Horcher was a Trustee in Wheeling when Mr. Rooney was selected as the Village Manager in 2006. Mr. Rooney was excellent and always did a great job. At least two of the employees he hired are still working for the Village. He explained every decision he made, and they all made sense. Working with him was very easy.

The Village went through a big growth spurt before the economy tanked. Mr. Rooney definitely maintains an organization, but he was able to be innovative because of revenue streams from the growth spurt. He coordinated the construction of a new Village Hall, Fire Station, Public Works Building, and turned the old Village Hall into a dedicated Police Station. He definitely kept the Village moving forward.

## Reference Notes J. Mark Rooney

Mr. Rooney was always at community events like the 4<sup>th</sup> of July celebration, but meeting with the general public was not his responsibility, Mr. Rooney primarily met with developers. He became involved when the job progressed to the point that it required coordination with the Village Attorney, Engineers, the developer's attorneys and the engineers.

Mr. Rooney always presented every option rather than just highlighting those that might be favorable to one side of the board or the other. He kept them very well informed. He led the project to buy a parcel of property that is now being developed as the Village Town Center.

When they began to feel the loss of tax revenue after the economic downturn, Mr. Rooney had to reprioritize departments, functions and services. He looked at employees who were close enough to retirement that they could buy out. He managed the Village during a volatile time and did very well. He always meets deadlines.

The Village had a fueling station with gas pumps and tanks. The Park District uses the station and pays for the gas. The Board decided that the Park District should contribute to a new building. Mr. Rooney sent them a memo outlining this idea and they were not happy about having to contribute. Even though Mr. Rooney was only doing as he was instructed, the Board declared he had overstepped his bounds and asked him to apologize to the Park District. Mr. Horcher thought it was absolutely wrong to ask him to do so, but Mr. Rooney understands the chain of command and that he needed to make the apology. He is honorable and did his job.

Mr. Rooney has not been involved in anything controversial. Over a period of several years a developer was given over 10 million dollars in TIF money, which put the Village in a difficult situation because they have maxed out the funds but did not receive the benefits they had hoped to receive. At the time the Village President was the Vice President of the bank who financed the developer on the other end and another Trustee backed the developer no matter what. On a day that this developer was coming before the Board to ask for more funds, they discovered that the developer had allowed his associates to dump material on a piece of Village owned designated wetland, of up to eight feet of debris. The Board had to hold an emergency executive session. The Trustee who backed the developer stated that she did not understand why they were making a federal case out of it. Mr. Horcher responded that it was a federal case as the land was federally owned wetland. The Trustee convinced the Board to give the developer more money anyway, which Mr. Rooney was opposed to. He pointed out that they were not receiving much value per unit being built. This situation factored into his departure from the Village and was part of the reason that Mr. Horcher resigned from the Board.

Mr. Horcher would hire Mr. Rooney in a heartbeat and really enjoyed working with him. Mr. Rooney's information was always accurate, and he relayed all the options even when they were not in the best interest of the community. He implemented whatever the Board decided.

#### Words or phrases used to describe Mark Rooney:

- Dedicated,
- Loyal,
- Honest,
- Diligent, and
- Honorable.

**Strengths:** Very thorough with his research, absolutely committed to the chain of command –

his job was to give the Board the facts and then implement the decision made.

Working with him was very simple.

Weaknesses: He trusted people.

#### Oneida Fehring – Administrative Assistant to Police Department and Village Manager, Carpentersville, IL 224-293-1660

Ms. Fehring met Mr. Rooney in 2013. She has worked for the Village since 1999 and is the administrative assistant for the police department. After his administrative assistant left, he began utilizing her as his administrative assistant, too, until he left in 2018.

Mr. Rooney was tough, but fair. He was the best Village Manager they had during her tenure. He made good decisions when hiring and likes to promote from within if he found the talent. He made good decisions in general.

The Village was very rundown with many potholes when Mr. Rooney was hired. She never would have moved into the Village at that time but with the upgrades and changes that he introduced, and she would gladly move into town. He maintains operations at a high level.

Mr. Rooney was often out in the community and was very friendly with residents. He was always happy and shook their hands. When residents called, he answered the phone and spoke to them. He was very involved in the community.

Even though Ms. Fehring was an admin, Mr. Rooney always treated her as though she was part of the senior staff. His leadership was exceptional. All department heads did their best to please him, and whatever it took to make sure the organization is running smoothly and well. He had good financial skills and was very responsive.

Controversy always exists in municipalities and people do not always agree, but those who are critical of Mr. Rooney do not always see the whole picture. Ms. Fehring does not believe that anything in Mr. Rooney's background would concern an employer. People did not complain

about Mr. Rooney to Ms. Fehring because she came to his defense, but she acknowledges that sometimes union employees were unhappy because they did not get their way.

Ms. Fehring would hire Mr. Rooney and enjoyed working with him, he is excellent. The town really turned around through his leadership. When he was walking to her office, he spoke to people on the way to find out how their day was going. He was very involved in City Hall. He was with Carpentersville longer than any previous Manager and was very, very fair. An employee in finance told Ms. Fehring she was very grateful to him because he gave her the opportunity to prove herself. He offered a position in payroll to another employee who did data entry for the police department, and it worked out very well. He encourages talent and makes sure that employees grow within the organization. He is fantastic.

#### Words or phrases used to describe Mark Rooney:

- Fair,
- Great leader.
- Good natured, and
- Great leadership skills.

**Strengths:** Leadership, knows how to lead his departments heads. The Village ran so much

better and comradery between departments was better than it ever has been.

Weaknesses: When people do not follow orders, he calls them into his office though this does

not happen often nowadays.

#### Kathy Lamkin – Former Human Resource Director, Carpentersville, IL 630-464-4690

Ms. Lamkin does Human Resource consulting. Another manager recommended her to Mr. Rooney, and they worked together from September 2015 to January 2017.

Overall Mr. Rooney had an excellent job performance. He was extremely analytical. He was hired to help Carpentersville from a budget perspective and did an excellent job. He was a good match for the Village at that time.

Everyone makes a mistake or two, but Mr. Rooney made good hiring decisions overall. He made great decisions for the organization. From Ms. Lamkin's perspective in Human Resources, she would have liked him to think more about the individual employee, but she understands that the Manager has to look at the big picture.

Mr. Rooney is definitely innovative. He came up with many ideas, some of which Ms. Lamkin questioned, but they almost always worked. If someone does not like change, they might be

## Reference Notes I. Mark Rooney

frustrated working for him because he always has new ideas to try. When employees do their work, he is good to them. If they do not, they will know they are not meeting expectations.

Mr. Rooney attended Board and staff meetings. He kept Ms. Lamkin informed most of the time, but she was only in the office three days a week, which made it challenging. When she felt she should have been informed about something, he always listened. He was always responsive.

During a police department investigation, they had to decide how to handle it to keep the employee from filing charges. Mr. Rooney asked some questions and helped them determine the best route. He used the newspaper test, meaning he asked them what each decision would look like on the front page of the newspaper.

The Fire Chief was investigated and rather than being fired, he was given the option to retire. He then ran for Mayor and won which created a very uncomfortable situation. This Chief grew up in the Village. Ms. Lamkin gained a great deal of respect for Mr. Rooney during this time. It was a difficult decision and asking for the Chief's resignation could have been the end of Mr. Rooney's career. Even so, he did what was right for the organization. Also, there was a situation about a disagreement that ended up in the paper. Ms. Lamkin does not know much about it, except that Mr. Rooney was exonerated. In Illinois, Administrators do not hire their department heads. Mr. Rooney will do better if he has control over who his department heads are.

Depending on the culture, Ms. Lamkin would hire Mr. Rooney. He is not a good fit for her client that is extremely focused on doing everything for the employee even if it means changing the rules. To be clear, Mr. Rooney was fair to employees and offered benefits that were cost neutral to part timers, but he did not bend over backwards to make sure that everyone gets what they want. In general, she recommends him and enjoyed working with him.

#### Words or phrases used to describe Mark Rooney:

- Smart.
- Creative,
- Wants to do the best for the organization,
- Loval, and
- Assertive.

**Strengths:** 

Extremely smart, analytical, understands the politics, keeps the Board informed, handled very sensitive issues including union negotiations or investigations, knew what to tell the Board without getting them involved in the minutia.

Weaknesses: He can be pretty business oriented and some who are sensitive might not think that he cares as he is just not touchy feely. While it did not bother Ms. Lamkin, she had hoped he would open up a little more.

## Reference Notes J. Mark Rooney

#### Mike Angus – President, Chicago Area Mountain Bikers, Carpentersville, IL 630-804-9521

Mr. Angus and Mr. Rooney met in 2013. They worked together on projects for the community which mainly consisted of identifying land options and approaching owners to see if they were amenable to using the land for a bike park. The park they envisioned is now in construction.

They participated in eight formal meetings together. When issues occurred, Mr. Rooney was very quick to address them, and he even visited the park to see the progress. He was very supportive. He is a great person and did everything that they asked of him.

Mr. Rooney was open to the idea of a bike park when many people were negative, and the resulting project has improved the Village substantially. When Mr. Angus had a question Mr. Rooney either responded quickly or delegated to the staff if he was busy. He was very good about keeping others informed.

The park had an issue with gangs and graffiti, Mr. Rooney was quick to offer police support and City staff to clean up the graffiti. If they had leftover rubble or trash, Mr. Angus called the City. Mr. Rooney swiftly took care of any issue.

Mr. Angus had limited exposure to Mr. Rooney but is not aware of anything controversial that is related to him. Mr. Angus would hire Mr. Rooney, he did very well in Carpentersville. They would not have the bike park without his efforts, he was very supportive.

#### Words or phrases used to describe Mark Rooney:

- Open minded,
- Direct,
- Caring,
- Supportive,
- Responsive, and
- Collaborative.

**Strengths:** Can make decisions and does not beat around the bush, he deals with issues.

**Weaknesses:** Employees have said that he can be pretty direct, but Mr. Angus has not witnessed it firsthand.

**Prepared by:** Lynelle Klein

Colin Baenziger & Associates

Page 42 of 131

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## CB&A Internet Research

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#### Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

[CB&A Note: Only the information pertaining to Mr. Rooney is included.]

https://biz.crast.net/illinois-has-spent-nearly-5-billion-in-pandemic-funds-heres-how-some-suburbs-used-it/ August 20, 2022

Illinois has spent nearly \$5 billion in pandemic funds. Here's how some suburbs used it. by Shawn Johnson

In Illinois, more than \$14 billion is expected to be divided and spent over the next four years from the American Rescue Planning Act, among state, county and local governments. The amount is about 4% of the \$350 billion state and local Financial Recovery Fund aid package approved by Congress and President Joe Biden in 2021. The funds were intended to stabilize government budgets, which could experience revenue deficits related to the pandemic, as well as operating expenses to maintain government services during the pandemic. According to a recently released report by the US Treasury Department outlining the first year of ARPA spending across the country, government agencies in Illinois have so far spent nearly \$5 billion on a wide range of initiatives and projects. But experts from some government finance organizations have limited details about how that money was spent and its effectiveness.

Round Lake Beach officials last year spent \$53,500 received from the American Rescue Plan Act on a COVID-19 vaccination incentive program for their employees.

Village manager **Mark Rooney** said 63 of the city's 73 full-time employees received an incentive of about \$1,000 "because it wasn't a mandate."

## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

Herald (IL) October 21, 2021

#### **Top Priority is Economic Development**

Author: Mick Zawislak

Round Lake Beach has a new full-time village administrator for the first time in nearly three decades. **Mark Rooney** has 25 years experience in suburban government, with stints in Highwood, Wheeling, North Chicago and Carpentersville. He assumed full-time duty in Round Lake Beach on Oct. 4 and was sworn in Monday to succeed Dave Kilbane, who retired in April after 28 years.

**Rooney** returned to Illinois and his longtime home in Highwood after three years as town manager in Westerly, Rhode Island, a tourist town known for its beaches and a summer population of 52,000. Round Lake Beach Mayor Scott R. Nickles said it was a hard decision but **Rooney** emerged from three highly qualified candidates. "We made our decision based on some of the issues facing our village now and in the future," Nickles said. "The future is our economic development and filling our empty voids," he said. The village doesn't have a lot of space for new development, making infill projects a key, he added.

Handling various intergovernmental agreements, continuing cooperation with surrounding communities and hiring a full-time finance director are other considerations moving forward, according to Nickles. **Rooney's** annual base salary is \$175,000, with a \$6,000 annual car allowance. He must give the village six months' notice if he voluntarily resigns within the first three years and 60 days' notice after that. As an "at-will" employee, **Rooney** can be fired at any time with or without cause.

**Rooney's** team and leadership approach was cited as a factor in the choice. He noted the stability created by Kilbane and long-term former mayor Rich Hill. "I want to build on the success the village has had," **Rooney** said. In the bigger picture, the Round Lake-area communities work together on regional decisions and understand the economies of scale, he added. The village offered **Rooney** the job on Sept. 4. Days later, he resigned as Westerly town manager. He'd been hired there as interim manager in May 2018 and given the full-time job that August.

**Rooney** served in the Army for 31 years, including seven on active duty. He retired as a lieutenant colonel in 2014. He was a staff assistant to the late Sen. Paul Simon before being hired as Highwood's first village administrator in 1996. In 2003, **Rooney** was named assistant village manager in Wheeling serving three years before being named manager. He left in 2009 for a brief stint in North Chicago before being hired in Carpentersville. He served seven years in Carpentersville before the village board in January 2018 voted to accept what it considered to be **Rooney's** "voluntary resignation," saying he had stopped reporting for work.

**Rooney** sued the village, claiming he was placed on involuntary leave and then fired without the severance and benefits he was owed. The parties settled in 2020 for \$220,000. Former Buffalo

### **Section 8**

## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

Grove Village Manager Bill Balling, who served as interim administrator in Round Lake Beach, said the village was looking for a highly experienced manager who understood state and county government and who had the experience to sustain and build activity along Rollins Road, its main business corridor. "I think we're setting the table with the management structure we have in place," Balling said. "We think we're getting the right person in place to mature the organization" and build on successes, he added.

#### Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

The Westerly Sun (RI) Sep 15, 2021

#### Rooney still on the job in Westerly ... for now

By Dale P. Faulkner

WESTERLY — If you're not sure who's running the town, you're not alone. As it turns out, according to town officials, Town Manager **J. Mark Rooney**, who on Sept. 9 announced his intention to resign, will stay on for at least the rest of this week. But on Monday, the Town Council did not discuss **Rooney's** status during the public portion of its meeting, even though he had already tendered his resignation. The council did, however, go into a private executive session to evaluate Rooney's job performance.

**Rooney**, who attended Monday's council meeting and participated in the executive session, declined to answer questions for this article, saying he had been asked by the council to refrain from making public comments. Following the executive session, Town Council President Sharon Ahern announced that the council had not taken any votes pertaining to **Rooney's** job performance or on the other topics listed on the agenda for the private session.

On Sept. 9 Ahern acknowledged that she had accepted **Rooney's** resignation and said he had discussed interest in staying on to assist the council with the transition to a new town manager. At the time, Ahern said she anticipated discussing **Rooney's** resignation and offer to stay on for a period of time during the council meeting on Sept. 13.

On Tuesday, Ahern said that **Rooney** was continuing to work for the town. "**Mark Rooney** is still the town manager as of today," Ahern said. "The Town Council has a plan and a firm leadership agenda and because, as you know, we were in executive session under personnel, we were advised by Town Solicitor [William] Conley that we could not discuss any details at this time, but action will be taken on Monday."

When asked whether **Rooney** would continue on for the rest of this week, Ahern initially said she was uncertain she could answer, but eventually said, "Yes. I don't want people to think that the town is without leadership. It most certainly is not."

Ahern said she had communicated with the chairpersons of some of the town's boards and commissions. "I have reached out to some of the board chairs and told them 'Please rest assured we have a plan' so no one thinks we are in an era of disruption," Ahern said. While the departure of a town manager can be "disturbing," Ahern said the position in Westerly and other municipalities tends to be one with a high turnover rate.

### **Section 8**

#### Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

The Westerly Sun (RI) August 3, 2021

#### **Town Council Considers Ways to Balance Transfer Station Budget**

Author: Dale P. Faulkner

WESTERLY — A new \$50 annual transfer station fee would be charged to all dwellings in the town, and the cost of town-issued orange trash bags would increase by \$1.00 under a plan being considered by the Town Council. The fee and bag-cost increase were some of the options developed by Michael Serra, assistant superintendent of the Department of Public Works, as a means to reduce the transfer station's reliance on the annual municipal budget to balance its financial ledger. The transfer station is designated as an enterprise fund that many officials say should be financially self-sustaining based on user fees. The Board of Finance, during deliberations on the municipal and enterprise budgets last spring, asked the Town Council to study the transfer station's financial performance, noting its increased reliance on funds from the town budget rather than fees charged for use of the facility to balance the facility's annual budget. The transfer station is relying on \$488,571 from the annual budget in the current fiscal year to balance its \$2.96 million budget. In return for the \$50 annual fee, which officials said would likely be included with municipal tax bills, property owners and residents would receive a permit that would grant entry to the transfer station.

Serra and Town Manager J. Mark Rooney discussed the recommendations with the Town Council during a workshop meeting on Monday. Rooney said use of funds from the municipal budget has increased in recent years because expensive equipment used at the transfer station has required replacement. He also reminded the council and residents that the town no longer receives money for recyclable items because of the decline in the international market for recyclable items. The recommendations come as Rhode Island Resource Recovery Corporation, which operates the state landfill in Johnston, which receives the town's trash, is increasing its fees to municipalities. In the current fiscal year, the corporation's fee increase to the town is estimated to result in a 4% overall increase from \$1.049 million to \$1.086 million and an estimated 13% overall increase in 2022-23 to \$1.22 million. Additionally, the vendor that supplies the orange bags is increasing the cost of the bags by 15%. Members of the council stressed that the recommendations they are considering are intended to mitigate reliance on the annual town budget. They also noted that ultimately residents all pay for the transfer station either through taxes that support the municipal budget or fees imposed for use of the facility. "We're not trying to make money. What we're trying to do is close the gap. We need to figure out how we can break even every year," Councilor Suzanne Giorno said. Councilor Caswell Cooke Jr. said he supported the proposed new permit fee and increase to the cost of trash bags, and said Serra and **Rooney** should be given authority to increase fees when the town is facing increases in the fees charged for use of the state landfill. The council is expected to consider an ordinance that would establish the permit fee and trash bag cost increase in the future. Rooney and Serra agreed to study a proposal by Councilor Karen Cioffi to eliminate use of the town-issued trash bags. Cioffi said the bag system would no longer be necessary if the permit fee is adopted.

#### Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

NPR Radio (USA) August 22, 2021

#### **Rhode Island Braces for Tropical Storm Henri**

Author: Susan Davis

Susan Davis speaks with **Mark Rooney**, town manager of Westerly, Rhode Island, about how the town is planning for Tropical Storm Henri.

#### SUSAN DAVIS, HOST:

Henri is already dropping rain on New England and hitting the coast with high winds. The tropical storm spent much of yesterday as a hurricane and is expected to officially make landfall this afternoon. **Mark Rooney** is the town manager of Westerly, R.I., and joins us now. Thanks so much for taking the time.

MARK ROONEY: You're welcome.

DAVIS: Other officials in the region today say they're expecting something akin to Superstorm Sandy. Is that what you're preparing for?

**ROONEY**: That is exactly what we're preparing for because we're - with the high tide of the full moon - causes about a 3-foot rise naturally, and then the 3 to 5 feet of storm surge could be very detrimental because it'll breach the dunes and bring sand and water inland. And that - it leaves a lot of sand on the road and causes a lot of infrastructure issues.

DAVIS: So what kind of preparations are you making, and what have you been telling your constituents about how to prepare for the storm?

**ROONEY**: Well, we've issued a shelter-in-place at about 9:30 this morning, and we had a temporary - or a recommended evacuation of the area that is most prone to the storm surge. And we're - at this time, we're closing off some of the access roads into the most prone flooding areas on - along the shore.

DAVIS: Have folks been listening to the evacuation order? I know, oftentimes, people decide to stick around even when they're told to leave.

**ROONEY**: For the most part, they did. The hotels, I think, had check-out this morning in the affected region. And so some of those visitors did leave the cottages or their Airbnb. But we do have - we still continue to have people that come in to the area because they see the Weather Channel. But we do have police cars advising people to leave those areas.

DAVIS: Can you talk us through the preparations that you've made and what you're telling your constituents about how to weather the storm?

**ROONEY**: Well, we've issued a shelter-in-place to every resident of the community. And in the heavily impacted areas, we have police blocking access into those areas and escorting people out that have gotten in there to do observation or - we had surfers earlier in the day. So those all have been moved out of the area.

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## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

DAVIS: What's your biggest concern right now in terms of safety?

**ROONEY**: Downed power lines. I saw some preemptive shutdowns of gas lines in the beach areas to preclude any problems to the system overall. And they do have crews that will work to restore power as long as the winds are below 35 miles an hour. So they have been working, even in the storm, to restore power. We've got scattered power outages but not widespread.

DAVIS: It's been nearly 30 years since a storm of this measure has affected the New England area. Do you think that the local area is more prepared for a storm like this now?

**ROONEY**: The communication systems are much more robust now in the coordination between the fire district, national grid and the town, and then we have state assets, as well. That cooperation and interdepartmental level of training is there, and we find that the fire department they have been staffed up and very responsive this morning to any trees on roads and opening them up within 30 minutes.

DAVIS: All right. That's **Mark Rooney**. He's town manager of Westerly, R.I. Thank you so much for your time.

ROONEY: You're welcome.

#### Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

The Westerly Sun (RI) July 24, 2021

#### Westerly, Former HR Director Settle Lawsuit; Town Admits No Guilt

Author: Dale P. Faulkner

WESTERLY — A lawsuit filed against the town by its former human resources director claiming she faced illegal retaliation and that her rights under whistleblower and family leave laws were violated has been settled out of court for \$98,500. The four-count lawsuit filed in U.S. District Court in Providence in December on behalf of Nancy M. Markey, who worked as human resources director for about two years, claimed Town Manager **J. Mark Rooney** violated her rights as a whistleblower and rights she had under state and federal medical leave legislation, as well as rights she had under the federal Family First Coronavirus Response Act.

Terms of the settlement agreement were reached after both sides participated in a voluntary mediation session aimed at avoiding a trial. The agreement does not constitute an admission of wrongful or unlawful acts by **Rooney** or the town, according to terms of the agreement. The Town Council voted unanimously to approve the agreement in late June but did not announce the vote until Monday because the town's lawyers advised not announcing the agreement until it was signed by all parties, said Town Council President Sharon Ahern on Monday.

Lawyers for Markey and the town said the agreement reflected give and take by both sides. "Both parties compromised significantly. I think it's in the best interest of the taxpayers," said Matthew Oliverio, the lawyer who represented the town in the case. By settling early, Oliverio said the town avoided the cost of additional legal representation, which would have started to mount if the case was decided by a judge, regardless of whether the town won the case.

Employment law claims generally involve economic damages related to the claimant's salary and livelihood and whether they found alternative employment and at what level of compensation, as well as an analysis of economic damages including pain and suffering, said Richard Sinapi, Markey's lawyer in the case. Potential settlement agreements are also based, Sinapi said, on clients' risk preference. "My client felt it was a fair settlement and it was acceptable to the town as well and that was the compromise that was reached," Sinapi said. Markey is now working for a school district and is "doing very well," Sinapi said.

According to the agreement, the settlement payment was broken into three components: \$32,400 for unpaid wages, less applicable deductions and withholdings; \$32,400 for non-economic damages (such as pain and suffering); and \$33,700 for legal fees and costs. Markey claimed, in the lawsuit, that **Rooney** retaliated against her after she told him she planned to report violations of COVID-19 protocols she observed in Town Hall in March 2020 as the pandemic started to take hold and wreak havoc throughout the country.

The retaliation continued, the lawsuit alleged, when the town unsuccessfully contested and appealed Markey's application for unemployment benefits. The town argued, according to

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## **Section 8**

## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

Markey's lawsuit, that Markey had been terminated for insubordination and failure to follow leave and attendance policies, but a state Labor and Training Department appeal-hearing officer found Markey had followed routine steps for leaves she took and that there was no evidence of intentional wrongdoing. **Rooney** did not return a telephone message seeking comment for this article but typically does not discuss matters involving employees.

#### Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

[CB&A Note: We have spoken to the Town about this matter and, we are confident the suit described below is without merit.]

Westerly Sun, The (RI) February 7, 2021

#### Westerly's former HR chief sues the town

Author: Dale P. Faulkner

In federal suit, Markey alleges she was fired after blowing whistle on alleged violations

It was the early days of the COVID-19 pandemic last March, and tensions were running high, including on Broad Street in Town Hall. Workers were, allegedly, pushing for permission to work from home and asking for the building to be sanitized and for the public's access to be limited.

According to a federal lawsuit filed recently against the town by Nancy M. Markey, its former human resources director, it was against this backdrop that she was fired by Town Manager **J. Mark Rooney** in retaliation for informing him she planned to report alleged violations of COVID-19 protocols to state and federal agencies. It was, the lawsuit asserts, a violation of both federal and state family medical leave protections.

The lawsuit also describes the mood in Town Hall when two workers tested positive for the coronavirus and detailed concerns with how **Rooney** was handling the pandemic, including whether employees would be informed if other employees tested positive for the virus. Many of the events depicted in the lawsuit occurred prior to Town Hall eventually being closed for a special cleaning and before an appointment-only policy was put in place during the first surge of the virus.

**Rooney** and Town Attorney William J. Conley Jr. declined to comment or answer questions for this article, citing personnel policies of not commenting on pending litigation. The town has yet to file a formal response to the lawsuit, which was filed Dec. 22 in U.S. District Court for the District of Rhode Island in Providence.

The lawsuit also alleges that **Rooney** failed to quarantine himself after experiencing symptoms of the virus and getting tested and that he ordered Markey not to tell anyone that he had been tested. Other accusations made by Markey include that **Rooney** initially failed to inform her that a Town Hall worker had tested positive for the virus, despite **Rooney** having asked Markey to handle employee COVID-19 issues, that **Rooney** criticizing the state's handling of the virus and that **Rooney** swore at Markey on one occasion.

**Rooney** and the town are named as defendants in the lawsuit, which contends that **Rooney** retaliated against Markey when he put her on administrative leave the day after she sent him an e-mail stating her intent to complain to state agencies about the town's alleged failure to comply

## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

with COVID-19 executive orders issued by Gov. Gina Raimondo. Markey worked for the town from October 2018 until she was removed from her position in May following her placement on administrative leave in April. The retaliation continued, the lawsuit alleges, when the town unsuccessfully contested and appealed Markey's application for unemployment benefits.

"... The director of the Rhode Island Labor and Training Department issued a decision that [Markey] was entitled to unemployment benefits because the investigation conducted by [the department] failed to show evidence of intentional wrongdoing" by Markey, the suit asserts.

The town appealed the director's decision, arguing that Markey had been terminated for insubordination and failure to follow leave and attendance policies, but the appeal-hearing officer found Markey had followed routine steps for leaves she took and that there was no evidence of intentional wrongdoing. "The [hearing officer] further found that the alleged insubordination was centered on disagreement over the handling of COVID-19 protocols that eventually led to her termination, which did not constitute misconduct in connection with the workplace," the lawsuit states. A second appeal by the town to stop Markey from receiving unemployment benefits also failed.

Markey's Family Medical Leave Act claims stem from leaves she took in March and April. The lawsuit also alleges Markey's rights under the federal Families First Coronavirus Response Act were violated when she was placed on administrative leave after taking a medical leave to await the results of a COVID-19 test.

The termination of her employment also amounts to a violation of Markey's rights under the state Whistleblowers Protection Act, according to the the suit, which alleges she was fired for filing complaints with Raimondo's office and other state agencies. The lawsuit seeks unspecified back and other pay or reinstatement of Markey's position, compensatory and punitive damages, as well as attorneys' fees and court fees.

Richard Sinapi, Markey's lawyer, said the damages that will be sought had not been calculated but would be based on lost wages and benefits and on the impact of the termination on Markey's reputation. "... And there is some emotional pain and suffering that is associated with an abrupt termination from a publicly appointed position where you are trying to do your best job and you get the rug pulled out from under you," Sinapi said.

In July of 2019 Markey received an "exceeds expectations" job performance review from **Rooney** and her pay was increased from \$85,000 per year to \$90,125, according to the lawsuit.

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## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

Brattleboro Reformer (VT) February 1, 2021

#### R.I. COMMUNITIES OFFER VACCINE

**Bennington Banner** 

Cities and towns are administering a limited number of COVID-19 vaccines to residents ages 75 and older. The Rhode Island Department of Health announced Thursday that they could get vaccinated. Many appointments filled up quickly. Each city and town has been allocated a certain number of doses.

In Westerly, most of the people who were called were selected using the municipal voter roll. Their names were sorted randomly using the last four numbers of their phone numbers, Town Manager **J. Mark Rooney** told the Sun.

Some of the 34 housing authority and senior center individuals were not taken from the voter list in order to include others who might not be registered to vote. "We tried to get across the demographic as best we could," **Rooney** said.

## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

Westerly Sun, The (RI) January 27, 2021

#### Progress made on Westerly rights of way

Author: Dale P. Faulkner

Council lauds Rooney's efforts to clean up beach access pathways

Two-dozen rights of way that provide access to the shoreline have been surveyed and many cleared and marked with granite posts under a program directed by Town Manager **J. Mark Rooney** at the request of the Town Council.

The work was performed in conjunction with development of the municipal Harbor Management Plan. An interim version of the plan, mostly focused on moorings, was adopted by the council in 2018. The council thanked and praised **Rooney** Monday following his presentation on the work that was accomplished by a professional land surveyor and public works personnel with input from Lisa Pellegrini, director of Development Services, Julia Beasley, interim Recreation Department director, and Kimberlie Rayner- Russell, assistant harbormaster.

**Rooney** also reviewed four potential new sites around Winnapaug Pond that could be formally designated as municipal rights of way in the future. The four sites have been used historically but are not listed on town documents as designated rights of way.

Councilor Caswell Cooke Jr., who serves as executive director of the Misquamicut Business Association, said residents and business owners have asked for formal access points to the pond for decades. "It's something that people have really talked about since I started down at the beach more than 20 years ago, and it never happened," Cooke said.

One of the proposed new rights of way to the pond is at the end of Terrace Avenue, where Rooney said officials hope to create a launch area for small watercraft. The other three proposed sites are all off Atlantic Avenue.

**Rooney** also reviewed photographs of the 24 rights of way that were surveyed. The photographs depicted clearing and sturdy granite posts that officials are hopeful will mark the paths to the shoreline indefinitely and stop a pattern of rights of way becoming overgrown and their location and status as public unclear. Officials are also seeking permission and grants from the state to install kayak and canoe racks at some of the rights of way, **Rooney** said.

Pellegrini said officials hope a map depicting the rights of way can be added to the Harbor Management Plan."To make it easy for the public to just flip through the plan and see where the rights of way are," Pellegrini said.

**Rooney** assured residents that rights of way to the shoreline have been a priority in recent years but said the work is time-consuming. "I would ask the public, again, for a little bit of patience ...

#### Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

we are, as the council has promised, moving on the rights of way. They have not fallen off ... the staff has worked on it. I want the public to understand that it's not that they were ignored," **Rooney** said.

Councilor Christopher Duhamel and other councilors joined with Cooke in praising **Rooney**'s work. "**Mark** is a great asset. He's really made this happen and he's calmed a lot of battles on this," Duhamel said.

Prior to **Rooney**'s presentation, the council reviewed proposed language changes to some of the rights-of-way descriptions in the Harbor Management Plan. As part of the review, the council agreed to strike proposed language that would have stated that public parking would be added adjacent to the Waters Edge Road right of way in Watch Hill. Council President Sharon Ahern said the council had received numerous written comments critical of the proposed language on parking. Residents and others who participated in the meeting remotely were critical of the decision, saying it was premature and that parking was needed at the right of way.

A lawyer for the Watch Hill Fire District and the Watch Hill Conservancy, Gerald Petros, questioned proposed new language in the plan related to Fort Road in Watch Hill. Petros said the road is not a public road and that a lawyer working for the town had previously reached the same conclusion. References to Fort Road as a right of way to the shoreline are unnecessary, Petros said, because the fire district and conservancy have demonstrated commitment to allowing public access to Napatree Point.

Anthony Palazzolo, who owns property in the town, asked the council to study the Fort Road question more closely and raised questions about the legal opinion cited by Petros.

Ahern asked residents and other interested citizens to submit comments to the council prior to Feb. 22 when she said the council would resume a workshop meeting on the rights of way section of the Harbor Management Plan.

## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

Westerly Sun, The (RI) November 19, 2020

#### Westerly councilors praise town staffers for road work

Author: Dale P. Faulkner

Duhamel: Recent work on infrastructure, Duhamel says, has been completed quickly

Members of the Town Council are praising the municipal Engineering Department and town manager for their work on projects paid for with a \$15 million bond approved by voters in 2018. With the bulk of the bond funds spent or committed, long-serving council members say the work surpasses anything they had seen before. Work under previous road bonds of \$6 million in 2014 and \$6.5 million in 2010 was often slow to proceed.

"I'd like to go back to 2018 when the electorate approved the \$15 million bond. I thought it was insurmountable. How could we ever keep up with that? How could we get it all done? But you made it happen," said Town Council President Christopher Duhamel on Monday. Duhamel, who has served 16 years on the council, was speaking to Town Engineer Kyle Zalaski and Town Manager J. Mark Rooney.

Zalaski provided an overview of work accomplished under the \$15 million bond and what remains to be done. **Rooney** asked that former Town Engineer Sheila McGauvran also be recognized for her work on the bond projects before Zalaski started his job with the town and when she served as a consultant during Zalaski's first year in Westerly. "It's an incredible feat and you should be commended for what you've done. We sat on other councils when we didn't get any real results," Duhamel said.

In 2019 about 11.5 miles of roads were resurfaced and the School Street reconstruction project, which is set to begin in March, was designed. This year about 8.2 miles were resurfaced on 42 roads. All of the 58 roads on the original road bond list have been resurfaced except for Pearl Street, which will be worked on next year. An additional 28 roads were also addressed under the bond. "In all the years that Chris and I have been up here, it's never gone this smoothly or this quickly, so it's pretty amazing," said Councilor Caswell Cooke Jr., who has served on the council for 14 years. "It's an incredible feat and you should be commended for what you've done. We sat on other councils when we didn't get any real results." - Christopher Duhamel, council president

Councilor Suzanne Giorno thanked Zalaski for providing the council with regular updates on road bond projects, which she said enabled council members to easily answer residents' questions.

The council recently authorized **Rooney** to proceed with a \$2.95 million contract with Ferreira Construction of New Jersey for the School Street reconstruction project. The utilities department will pay \$750,000 toward the cost of the project to cover the cost of upgrading the water system on the road and \$2.2 million of the road bond is earmarked for the project, which is set to occur

### **Section 8**

## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

from March 1 to Nov. 1. A 25% contingency to cover potential cost overruns and the cost of project oversight has been established for the project. Councilor William Aiello said the contingency was too high and will unnecessarily tie up funds that could be used for other projects. Zalaski said town officials decided on a 25% contingency in light of cost overruns that occurred with a similarly expansive project on Cross Street a few years ago. "There is some concern that we thought warranted the 25%," Zalaski said. Aiello was also critical of decisions to add certain road projects during the course of the bond.

Not including the School Street contingency funds, there is about \$2.1 million remaining from the bond. In the running for those funds are projects on Bowling Lane, Breen Road and Pasadena Avenue, and Riverview Avenue. Other projects on the horizon include Church Street sidewalks, Atlantic Avenue resurfacing, work to rights of way on Waters Edge Road and Manatuck Avenue, and the reconstruction of Uzzi Avenue.

**Rooney** said he anticipated recommending a new \$5 to \$7 million road bond to be considered in a referendum in the spring to cover the cost of some of the more expensive projects that remain to be accomplished.

## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

Providence Journal May 21, 2020

### On R.I.'s south shore, opening town beaches gets down to nitty-gritty

Author: Donita Naylor

Correction: Visitors to state and town beaches will not be required to wear cloth face coverings if they can consistently stay at least six feet apart from those in other groups. All beachgoers are asked to bring face coverings to the beach and wear them in any crowded area, such as bathrooms, concessions or parking lots. An earlier version of this story did not accurately describe the policy.

Remember before, when the things that triggered fear at the beach were a fin circling, a stomach cramp from swimming too soon after eating, or maybe sunburn, bullies, creeps or undertow? This year, danger at the beach is invisible and so much deadlier. Now, sitting downwind and within six feet of someone who sneezes, or touching a door handle last touched by someone who doesn't know they have the virus, or talking with someone not wearing a face mask can land you in a medically induced coma, and, if all turns out well weeks later, a wheelchair for your ride home from the hospital. Gov. Gina Raimondo has been careful to open only two state beaches, to test whether infection rates rise. Scarborough in Narragansett and East Matunuck in South Kingstown will open Monday, free of charge, but they will have no lifeguards, no concessions, no changing rooms or showers. Towns have to meet strict requirements before opening a town beach. They're tightening the rules for proving residency and, in some cases, allowing only residents to buy season passes. Nonresidents have to buy day passes. Towns will have to clean their beach facilities more frequently each day; require everyone to wear a mask in crowded areas such as bathrooms, concessions or parking lots; and enforce a limit of five people in a group and a distance of six feet between each group's beach blankets and umbrellas. Nobody wants a coronavirus carrier who doesn't know it, who hasn't served two weeks of self-quarantine upon entering Rhode Island and who doesn't wear a face mask. Seeing a spike in coronavirus cases in the saltwater beach towns would set back the progress that has come at so high a price to so many Rhode Islanders.

Only Westerly has announced it will open its town beaches in time for Memorial Day weekend, all three of them. Town Manager **Mark Rooney** said they'll open Friday. At the same time, the executive director of the Misquamicut Business Association, which represents about 40 businesses along a three-mile stretch with half-mile Misquamicut State Beach in the middle, is asking Raimondo to open that beach this weekend, or at least install trash containers and portable toilets and allow cars to park in the giant state lots. "People are going to come," said Caswell Cooke, executive director of the business association. "You can't stop them." With 2,800 parking spaces at the state beach shut down, those cars will flood the village. Cooke said that, with the state beach closed, his association will be picking up trash strewn along Atlantic Avenue for the half-mile of the state beach parking. He suggested that the governor might hope for rain this weekend. "By not opening that beach, it's going to be a public safety hazard," he said.

# Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

**Rooney** said people from New York, Connecticut, Massachusetts and Florida own second homes in Westerly, and they can get parking stickers for Wuskenau Town Beach and Larkin Road for access to East Beach, but they can't get passes for Westerly Town Beach. The problem is that it's impossible to know if a carload has been here two weeks or more for quarantine, he said. "Unless we see them cross the river, we don't know." The police approach will be officer discretion. "We're going to seek compliance, not confrontation," **Rooney** said.

Saltwater beach towns in South County — Westerly, Charlestown, South Kingstown, Narragansett and North Kingstown, are following directives from the governor that are outlined and detailed in ReOpeningRI.com. Towns are required to meet the new beach standards, Narragansett Town Manager James Tierney said. In Narragansett as in the other towns, the price of beach passes has not gone up, but residency rules have tightened. As issues arise, the town will have to solve them case by case, he and Narragansett Parks and Recreation Director Steve Wright said. Tierney promised that Narragansett Town Beach will open, but he wouldn't say when. It will be announced on the town website and social media.

The beach will have the same hours, 8:30 a.m. to 8 p.m., but unlike other years when the parking attendants left at 5 p.m., this year they will stay on duty until 8, turning away cars from elsewhere. Narragansett Town Beach has been widely perceived as a free beach after 5 p.m., but that will change this year. Narragansett beachgoers will see signs instructing them about the rules. "Please do your part to stay six feet apart," is one, Wright said, and another is that face coverings must be worn in the pavilion, restrooms, concession areas, when walking among others, but not in the water. Also, "If you're not feeling well, please stay home."

North Kingstown Town Manager A. Ralph Mollis said his town's beach is opening this weekend, but he didn't say which day. South Kingstown, like most towns, will open its town beach on weekends only until mid-June. In Charlestown, people who walk to a town beach can enjoy it for free. The towns are selling beach passes and parking stickers at the beach, through the mail or online. Residents who order and pay online are asked to call ahead, then wait at the curb for someone to bring them out. Each town's website has details about prices, hours, locations and who's eligible. "Everybody's adapting," said Terry Murphy, South Kingstown's director of leisure services. "We've found everybody to be very patient and understanding." It could be worse. Some "famous popular tourist places," she said, are selling beach reservations. Beachgoers turn up at a specified time and get an assigned spot.

# Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

The Westerly Sun (RI) March 2, 2020

# **Council Seeks Funding Details as it Weighs Reduction in Transfer Station Operations**Author: Dale P. Faulkner

The Town Council is seeking more details on transfer station funding before it will consider approving a staff proposal to reduce the facility's operations one day each week. Town Manager **J. Mark Rooney** and Mike Serra, who manages the facility at Larry Hirsch Drive, asked the council to sign off on having the facility open to the public five days per week, but said they were aware that commercial haulers would likely need to continue on the new day of closure. **Rooney** and Serra said they preferred to close the facility on Mondays but would accept Wednesday or Thursday. The facility is currently open Monday through Saturday. On Mondays, workers from the Public Works Department staff the transfer station because the regular facility workers have the day off. By closing on Mondays, Rooney said overtime costs would be reduced and public works staff freed up to do their usual tasks. When the council approved a new fee schedule for the transfer station in July, **Rooney** said he planned to return in the near future to seek the council's consensus on closing the facility an additional day each week. Serra said closing an extra day is necessary for him to meet one of **Rooney's** requests. "I'm trying to eliminate some of the spending," Serra said. Rooney said the transfer station, which has been set up as a so-called enterprise fund since 2017, has required money from the general fund to balance its budget. In 2018, the facility required \$234,000, and in 2019 \$135,000 was needed. This year, **Rooney** said, the facility is on track to need \$330,000. In 2020-21, he said the facility will require \$1 million including expenses for equipment replacement. Enterprise funds are intended to function in a manner similar to businesses or come close to breaking even through revenues collected from charging for services. The loss of the international recyclable market has hurt municipalities throughout the country including in Westerly. "Recycling costs the town now," **Rooney** said. Handling and separating recyclable items takes time and is labor intensive, Serra said.

In addition to reducing days of operation, Serra said he is considering only accepting certain recyclable items on certain days Some members of the Town Council asked for more time and data on expenses, while others said they had made up their mind already. "I'm not in favor of dropping days ... this is a public service," said Councilor Sharon Ahern, adding that cost savings might be possible through a change in how the aspects of the facility are managed. Councilor William Aiello asked for more information but remained open **Rooney's** request. "Maybe there are other changes to reduce costs and the you would not have to reduce hours," Aiello said. "Give us the data and let us look at it. If push comes to shove maybe some sort of change is warranted." Aiello also recommended seeking input from commercial haulers. Councilor Karen Cioffi questioned, as she had previously, whether closing an additional day would save money. "I need some data on what's behind all this ... these operations have gone on for many years and I don't understand why we got to this point," Cioffi said. Council President Christopher Duhamel said the request from **Rooney** and Serra would be better handled when the council deliberates on the proposed 2020-21 municipal budget.

## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

The Westerly Sun (RI) December 12, 2019

### Rooney Receives Performance Bonus, Drops Bid for Job in Florida

Author: Dale P. Faulkner

The Town Council has approved a \$3,200 bonus for Town Manager **J. Mark Rooney**, amounting to 2% of his annual salary. The decision came on a 6-0 vote Monday after the council met in an executive session called to complete **Rooney's** annual performance review. **Rooney** announced before the vote that he had decided not to pursue a job opportunity in Florida, and Council President Christopher Duhamel said the two issues were unrelated. Duhamel said the performance review had been on the agenda, "and then news of him potentially interviewing elsewhere broke, and then he pulled out" of consideration for the other job.

An article on the website of the Panama City News Herald on Dec. 4 reported **Rooney** was a finalist for the position of city manager in Panama City Beach, Fla. At the time, **Rooney** declined to comment except to say that he had applied for the job after a recruiter encouraged him to do so. On Monday, during the public part of the Town Council's meeting, **Rooney** announced that he had decided not to seek the position and would not travel to Florida this week for an interview. **Rooney** did not respond to a request for further comment. According to Duhamel, the council had largely completed **Rooney's** review in September and scheduled Monday's executive session to consider giving him a bonus, as **Rooney** had requested. **Rooney's** three-year contract, which expires in August 2021, calls for him to receive a base salary of \$160,000 per year and includes a provision that allows the Town Council to grant performance bonuses at its discretion. "Given the review the council had of the manager we felt a bonus was in order," Duhamel said.

**Rooney's** review involved an assessment of his work by each member of the council. Individual councilors submitted their reviews to Duhamel, who compiled the results. His report, describing positive achievements and areas in need of improvement, was distributed to the full council. **Rooney** was named interim town manager in April 2018 and was later given permanent status. He previously worked for 20 years as a municipal administrator in Illinois. "I think he's doing a great job. It's tough to walk into a town with no basis of potential support but he has gained support from several organizations in town ... and the staff is respectful of **Mark** and listens to **Mark** and he's respectful of them," Duhamel said.

Duhamel also praised **Rooney** for appointing Shawn Lacey, a Westerly Police Department veteran, as chief of police. **Rooney** arrived to find a police department awash in ill feelings related to former Town Manager Derrik M. Kennedy's appointment of Richard Silva, and out-of-town candidate, to the position. Under **Rooney**, Silva entered into a separation agreement with the town and left the department. Duhamel also praised **Rooney's** work in renegotiating terms related to the town's solar project, which is to be built off of White Rock Road, and for successfully managing, in collaboration with his staff, the road work that is being performed under a \$15 million bond approved by the voters in 2018. "That was my biggest concern walking onto the council last November. In years past it was not made a priority," Duhamel said,

# **Section 8**

## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

referring to the management of previous road bonds. Councilor Karen Cioffi, in a telephone interview on Tuesday, also praised **Rooney's** work. "He clearly has dug into the community and made himself seen," she said. Cioffi, a former human resources director for the town, credited **Rooney** with helping to improve employee morale, which she said had plummeted before his arrival. "They were in down in the dumps. Morale was terrible and he had to lift those people up," she said. Like Duhamel, Cioffi also pointed to **Rooney's** handling of the police administration, the solar project, and road work as noteworthy achievements. Duhamel and Cioffi were joined by Councilors Suzanne Giorno, Caswell Cooke Jr., William Aiello and Brian McCuin in voting to give **Rooney** a bonus. Councilor Sharon Ahern, the seventh councilor, did not attend Monday's meeting.

## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

The Westerly Sun (RI) November 8, 2019

### Town Considers New Approach in Dealing with Risky Potter Hill Site

Author: Dale P. Faulkner

The Town Council has asked for more information about a proposed legal proceeding aimed at demolishing the dilapidated Potter Hill Mill property. The council met for 35 minutes in executive session on Monday to discuss hiring a lawyer who would petition a Superior Court judge, on the town's behalf, to be named as a special master to assist the town with its longrunning goal of demolishing buildings on the property that are falling into the Pawcatuck River. A special master is appointed by a judge to oversee one or more aspects of litigation. "The council made no decisions, in fact, we asked for more information," said Town Council President Christopher Duhamel. Officials and neighbors of the 4.5-acre property are concerned that the run-down buildings pose a threat to people who might trespass on the property, and that a dam associated with the property is not being maintained. "There's a lot of liability with that property," Town Manager J. Mark Rooney said Thursday. Rooney said he asked the council to consider mastership as a means to address the mill property after discussing the idea with John Dorsey, a lawyer who is serving as special master in a case involving the former Bradford Dyeing Association site. Ideally, **Rooney** said, mastership would allow the town to eliminate the safety hazards without taking ownership of the property. Dorsey, who has not been hired for the case, declined to comment.

The town obtained a demolition order from the Superior Court in the 1980s but never followed through on the demolition. The property, which remained subject to the demolition order, was then sold to Edward Carapezza in 1992. The town agreed to hold off on demolishing the property to give Carapezza time to redevelop it, but eventually moved to commence demolition in the belief that Carapezza had failed to meet provisions of the agreement. Carapezza's Renewable Resources Inc., of Hopkinton, obtained a restraining order against the town to stop the demolition but the order was eventually lifted in 2013. The Superior Court judge who vacated the restraining order said the town had demonstrated its willingness to work with Carapezza and shared his hope that the property could be redeveloped. But by holding off on demolition, the town had "placed itself at risk. By not immediately eliminating the hazard, the town risked that people might get hurt in the buildings," Associate Justice Brian Stern wrote in 2013. Carapezza appealed, but the state Supreme Court upheld the demolition order later in 2013. Two years later, however, Carapezza was approved for \$500,000 in tax credits through the Rhode Island Historical Preservation and Heritage Commission and the state Department of Revenue for what was estimated to be a \$3 million renovation to two buildings on the property. The tax credits are believed to have expired. Carapezza did not respond to messages seeking comment. Between 1762 and 1958, when the Westerly Woolen Co. closed, the site was home to grist, saw, cotton and wool mills. A fire in the 1970s decimated much of the property. In 2018, Carapezza was cited by the state Department of Environmental Management for violating wetlands regulations at property he owns in Hopkinton.

## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

The Westerly Sun (RI) November 6, 2019

#### Residents Challenging Town's Findings on Private Roads

Author: Dale P. Faulkner

Residents of four roads are disputing the town's position that they should no longer receive services such as plowing and paving. The town has said the roads are private, but the residents argue that they should be considered public. Their lawyer made their case before the Town Council on Monday. "My purpose in coming to this meeting tonight was to request the council stay enforcement of this private road issue so that we can get a better handle on this issue," the attorney, Michelle Buck, told the council. Specifically, Buck asked the town to continue plowing her clients' roads until issues she raised were resolved. She represents Greenspace LLC, which she said has an interest in Guarino Avenue, Maggio Street, and Gavitt Avenue, three roadways that are in the Oak Street neighborhood. Greenspace LLC owns several properties on Trackside Drive, which is adjacent to Guarino Avenue. Buck, who formerly served as a member of the Town Council and as town attorney and town manager, also represents Susan and Michael Bookataub, who live on Michael's Way.

Town Manager **J. Mark Rooney** said he had directed the public works department to continue plowing Guarino Avenue, Maggio Street, and Gavitt Avenue because property owners had presented town officials with material showing that the roads probably qualify for acceptance as town roads. According to **Rooney**, the property owners are developing a petition for eventual submission to the Planning Board asking that the roads be accepted as public roads by the town. Buck said some historical records indicate that the town owned Michael's Way and the other roads connected to her clients. "There are, at this point, more questions than answers relative to the status of these roads," she said.

**Rooney** also offered to have town crews continue plowing Michael's Way at least until a title search that the town is performing is completed, but he questioned whether Michael's Way will qualify for acceptance as a public road. "I can hold it in abeyance until the title search and see if it's going to change, but I spoke to the developer who said, 'I deeded it'" to a private property owner, he said. The practice of the town plowing and providing other services on private roads has been on **Rooney's** radar for several months. Last fall he wrote to property owners on the roads and informed them that the town would stop providing the services. The Town Council intervened, saying that the residents had not been given adequate notice and that the plowing services were provided last winter.

But after the council's public works subcommittee and Town Attorney William J. Conley Jr. studied the issue, town officials announced in September that they had determined which roads in Westerly were public and which were private, and said services would no longer be provided to the private roads. More recently Buck's clients received another letter telling them the services would no longer be provided. On Monday, Buck said the letter contained errors, including an incorrect citation to state law. "So if this letter was meant to put people on notice as to what the

# **Section 8**

# Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

town was saying or what the process was, it's really inadequate," she said. **Rooney** acknowledged that the citation was wrong, because of a typographical error. Buck said her clients have not had enough time to arrange for a private company to plow their roads and said there were "no mechanisms in place. There's no homeowners' association and no revenue available for residents of these roads to address these issues," she added.

Council President Christopher Duhamel thanked Buck for speaking to the council and noted that town officials had previously asked residents to provide information to prove their roads had already been formally accepted as part of the town's road system. Duhamel also asked that town officials' side with residents in cases where there were questions or doubt about the status of particular roads. Councilor Sharon Ahern, a lawyer, also thanked Buck but said she was not certain that the town was legally required to send residents a notice of the change in policy. "I'm not confident a letter is required," she said.

# Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

The Westerly Sun (RI) August 20, 2019

Pleasant Surprise: A Budget Surplus in Westerly

Author: Dale P. Faulkner

Town officials are projecting a \$135,601 surplus from the 2018-19 budget. The surplus would have been greater, but funds had to be redirected to make up shortages in the transfer station budget as well as an overage in an insurance fund. "The positive news is we did finish still in the positive not in the red," Town Manager **J. Mark Rooney** told the Town Council Monday during an overview of the fiscal year that ended June 30. **Rooney** noted that the council had approved in December the use of \$334,000 from the surplus or fund balance to use as a deposit to secure the town's option to purchase 100 acres of land off White Rock Road. The land is the designated site of a planned public-private solar power project. "Otherwise, staff did a great job of staying within budget items, and revenues came in a little more positive [than projected]," **Rooney** said.

The transfer station will require an infusion of \$211,481 from the municipal general fund to balance its books for fiscal year 2019. Finance Director Dyann Baker said the facility's overage could be due to the facility running as an enterprise fund for the first time. The move to run it as an enterprise fund means costs that might have been paid through other parts of the municipal budget are now accounted for as part of the station's expenditures. Enterprise funds are government services that charge a fee for the service and are sometimes self-sustaining. **Rooney** has proposed new measures to reduce costs at the transfer station.

Councilor William Aiello said the transfer station was not expected to become fully self-sustaining in its first year as an enterprise fund. Council President Christopher Duhamel said the facility seemed to face the same financial challenges that have existed for years. **Rooney** said officials, before his arrival, appeared to have underestimated the costs associated with running the transfer station.

The insurance fund required expenditures of \$93,699 to cover the town's responsibility for claims made against the town such as slip-and-fall cases before the town meets its deductible and its insurer takes over payment. "What was not budgeted in 2018-19 was anything to support claims. We have a high-deductible plan to keep our premiums low, and that requires more out of pocket for small claims and we saw more than usual in this particular fiscal year," Baker said, noting that **Rooney** sought a special fund to help cover the claims costs in his budget proposal for 2019-20 but the fund did not survive the budget deliberation process.

Expenditures on legal fees of \$491,684 were more than twice the \$234,680 that was budgeted. Baker attributed the overage to legal work on contracts, including for labor unions and the lease agreement for the planned solar project on White Rock Road. Tax revenue, Baker said, was "pretty much in line with the budget," and she noted revenue from invested funds exceeded projections by \$200,000. "Investment revenue was very strong this year, and we can thank Barbara Perino for the work she did on that," Baker said, referring to her predecessor. Licensing

# **Section 8**

# Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

and permit revenue was up as a result of increased permits for solar projects and mooring permits, Baker said. Competing with the gains were lower than anticipated hotel and meals tax revenue and lower than expected revenue connected to the state motor vehicle tax phase-out. Duhamel praised the work of both **Rooney** and Baker. "I'd like to acknowledge how well Dyann Baker and the manager, **Mark Rooney**, and his department heads, have followed this budget in the last months of the fiscal year to bring us within this target," Duhamel said.

# Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

The Westerly Sun (RI) July 20, 2019

### Former Town Planner Threatens to Sue for Severance Package

Author: Dale P. Faulkner

Rui Almeida, who was fired from his job as town planner in May, is seeking a severance package from the town. The Town Council discussed Almeida's request with Town Attorney William J. Conley Jr. during a closed-door, executive session that followed a regular meeting on July 8. No decisions were made or votes taken during the executive session, according to Town Council President Christopher Duhamel.

Almeida started in May 2018 and worked for the town for just under one year. He was initially placed on paid administrative leave by Town Manager **J. Mark Rooney**, who announced a few days later that Almeida would not return and that he had not been offered a severance package. **Rooney** has declined to discuss details surrounding Almeida's termination. The July 8 executive session was listed as a "potential litigation" item on the council's agenda. In response to a request for documents made by The Sun under the state Access to Public Records Act, Town Clerk Donna Giordano provided a letter from Lori Caron Silveira, Almeida's lawyer.

Silveira referred to a draft version of a lawsuit "asserting constitutional and other claims" on behalf of Almeida and said that it would be filed in court "if we are unable to reach agreement on severance terms." The letter also stated that Silveira had previously reduced Almeida's proposal for severance benefits "significantly." The lawsuit had not been filed as of Friday. Silveira said last week that she would check with Almeida when asked to share a copy of the proposed lawsuit. She did not return a message seeking comment for this article on Friday.

Almeida filled a vacancy created after former town Planner Jason Parker was placed on administrative leave by former Town Manager Derrik M. Kennedy in March 2018 and never returned to his job. Parker is now a member of the town Planning Board. Almeida holds architectural degrees from Roger Williams University and the School of Architecture of Lisbon and has a master's degree in the history of art — architecture and urbanism from the New University of Lisbon. He was assistant director for architecture and redevelopment in Central Falls, and deputy director of planning / city planner and administrative officer for Woonsocket from September 2016 until he took the job in Westerly.

**Rooney** appointed Nancy Letendre as town planner in June. Certified as a land planner by the American Institute of Certified Planners since 2007, she served as assistant town attorney for planning and zoning from 2017 until February and had worked in an of-counsel capacity at McGunagle Hentz, a Cranston-based law firm, since 2016. She was also principle planner for Mason & Associates Inc. of North Scituate, and worked for 18 years as a land use attorney at Ursillo, Teitz & Ritch, a Providence-based law firm.

## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

The Westerly Sun (RI) April 15, 2019

### Westerly Finds Savings in Settlement with Union on Payroll Irregularities

Author: Dale P. Faulkner

Faced with an initial bill of about \$179,000 to settle payroll irregularities alleged by a labor union that represents both town and school department employees, town officials succeeded in negotiating the figure down to about \$60,000. Town Manager **J. Mark Rooney** confirmed the settlement last week, giving credit to Patricia Main, who he said first suggested that calculations performed by an auditing firm hired by Laborers International Union of North America were skewed. When **Rooney** started his job in May, he learned the town was about to pay the full \$179,000 but Main told him the figure was too high. "I trusted her and she proved worthy of the trust," **Rooney** said of Main, who first went to work in the school department in 2004 and now serves as senior payroll and human resources specialist in the municipal human resources department.

Audits of payroll records are conducted routinely on behalf of the union, which represents the town's public works employees as well as school district bus drivers, secretaries and maintenance workers, to monitor the town and school district's contributions to employee pensions. Salter & Company LLC., a Maryland-based accounting firm, reported school employees were shortchanged \$150,000 and that public works employee pensions were underpaid by about \$29,000. Both figures included interest. After speaking with Main, **Rooney** asked former interim Finance Director Barbara Perino and Nancy Markey, the municipal human resources director, to analyze the auditor's findings and the town's payroll records. **Rooney** said that former employees had recommended paying the full \$179,000. "Basically, I believed Patty Main more... Patty Main was the hero in this," **Rooney** said. According to **Rooney**, part of the town and school district's exposure in the case was due to antiquated record keeping and payroll processes used by the school department. He told the Town Council recently that a proposal to consolidate aspects of the town and school human resources functions would help modernize those functions.

## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

The Westerly Sun (RI) April 5, 2019

### **Rooney Says One Dispatch Center Could Save Money**

Author: Dale P. Faulkner

Dispatch services currently handled by personnel at both the Westerly Ambulance Corps and the Westerly Police headquarters would be centralized at the police station under a proposal being floated by Town Manager **J. Mark Rooney**. **Rooney** discussed the idea with the Town Council Thursday during its second workshop on his proposed \$98.28 million combined general government and education budget for 2019-20. The council authorized **Rooney** and Chief of Police Shawn Lacey to begin discussions on the proposal with the ambulance corps. Under the current setup, fire and other non-police calls are dispatched by personnel at the ambulance corps, while dispatchers at the police department handle police calls. The ambulance corps is seeking \$75,000 as its annual subsidy from the town, double the \$37,500 it received in the current budget. More than half of the request, \$50,000, would be used to help cover the cost of upgrading dispatch center radio consoles at the ambulance corps' Chestnut Street headquarters. **Rooney** estimated the total cost of the new dispatch center at \$250,000.

Rooney said that his proposal "would help the residents by avoiding having to pay the duplicative cost of two dispatch centers." The police dispatch center was upgraded to a state-of-the-art level in 2017 and has the capacity to handle ambulance and fire calls, Lacey said. "It's not uncommon for police to take the 911 over," Lacey said. If the proposal takes effect, the police department would likely increase its dispatch center staffing from the current level of one full-time and one part-time employee per shift to two full-time dispatchers per shift, Lacey said. The added cost would easily be covered by revenues from fire departments that pay for dispatch services, Lacey said. The revenues would exceed the cost of running a centralized center, according to Lacey. "Actually, it would be a moneymaker," Lacey said. Dispatchers who currently work at the ambulance corps would be considered for positions at the police dispatch center, Rooney said.

Cost cut at animal shelter. The council also backed **Rooney's** plan to move the animal shelter back into the public safety section of the general government budget. At former Town Manager Derrik M. Kennedy's behest, the shelter was designated as an enterprise fund - a governmental function that provide services for a fee and is generally self-supporting. **Rooney** said the shelter has never been self sustaining and is not likely to be. Under **Rooney's** plan, one animal shelter position would be eliminated, reducing the shelter's budget to about \$247,000 per year. The council asked **Rooney** to review his proposal with Town Attorney William Conley. The council is scheduled to continue its review of the proposed budget during a meeting scheduled for Saturday morning at 9 in the Municipal Courtroom at Town Hall.

## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

The Westerly Sun (RI) April 4, 2019

### Councilors' Wish List at Odds with Town Manager's Budget Proposal

Author: Dale P. Faulkner

The Town Council started its review of Town Manager Mark Rooney's proposed \$98.28 million combined general government and education budget for 2019-20 on Wednesday with a discussion of individual councilors' wish lists and the appropriate assumed tax collection rate. Several councilors questioned Rooney's decision to reduce spending for annual road work from \$750,000 in the current budget to just \$25,000, and to completely eliminate spending for sidewalks, after allocating \$125,000 this year. Rooney said he made the reductions in an effort to devise a balanced budget. He noted that road work would continue as a result of the bond approved by voters in November. That initiative calls for borrowing up to \$15 million from the state Infrastructure Bank over five years for road and infrastructure work.

Councilor Caswell Cooke Jr. called for restoration of the road and sidewalk accounts to current levels. "I understand the logic but the reason we need the bond is because we never put enough in. It's self defeating," Cooke said, noting that previous councils established a goal of spending \$1.3 million per year to maintain the town's roads. Councilor William Aiello proposed increasing the sidewalk expenditure to \$300,000. Councilor Suzanne Giorno called for \$125,000 for sidewalks and "close to \$750,000 for roads." Giorno and Cooke also asked that \$30,000 for the summer beach concert series be restored. **Rooney** had eliminated that spending from the budget.

As part of its line-by-line analysis of the budget, the council restored a \$5,000 request submitted by Flock Theater, the New London-based theater group that plans to stage Shakespeare and other plays in Wilcox Park after the Colonial Theatre's traditional Shakespeare in the Park presentation. The council decided against funding Colonial Theatre's request for \$10,000 for the summer series, with some councilors saying the organization should seek funding from the school district. The Colonial did not conduct its summer series last summer. Instead, the organization focused on programming it developed for students. The Granite Theatre's request for funding was also denied by both **Rooney** and the council.

**Rooney's** budget would require a tax levy increase of 3.85 percent, close to the 4 percent cap established by state law, and is based on an assumed tax collection rate of 98 percent. Councilors Christopher Duhamel and Brian McCuin called for basing the budget on a lower assumed collection rate. Duhamel said the lower rate would provide flexibility. McCuin said the lower rate provides a means to build up the town's undesignated fund balance when actual collections exceed the assumed rate. Unlike the Board of Finance's recommended budget, **Rooney's** spending plan would not use the undesignated fund balance or surplus to help balance the budget or reduce its effect on taxpayers.

**Rooney** advised the council not to follow the finance board's recommendation. "The rating agencies don't like it," he said. He was referring to bond rating agencies such as Moody's

# **Section 8**

# Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

Investors Service. Moody's made a slight downward adjustment to the town's rating in 2016, citing the use of the fund balance to balance the budget as a factor in its decision-making. Bond ratings affect interest rates charged to municipalities when they borrow for major projects such as road work or new buildings. Duhamel, after the meeting, acknowledged "a big gap between the councilors' wish lists" and **Rooney's** budget proposal. "But that's the process and this is the beginning. There will be significant changes as we move forward," said Duhamel, the council's president.

The Board of Finance recommended a \$96.3 million combined municipal government and education budget with \$38.65 million in town spending and \$57.7 million for the school district. The board reduced the budget request from school Superintendent Mark Garceau and the School Committee by \$1 million and **Rooney's** request by \$2.36 million. **Rooney** is proposing an additional \$200,000 cut to the proposed education budget.

## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

The Westerly Sun (RI) November 3, 2018

### **Rooney Sets Procedure for Choosing New Chief**

Author: Dale P. Faulkner

With advertisements announcing the vacancy already running, Town Manager **J. Mark Rooney** hopes to name a new police chief by Dec. 20. Applications for the position will be accepted through the end of the business day on Nov. 26. **Rooney** said Thursday he plans to use two panels to conduct interviews: one that will consist of a mixture of citizens and municipal employees and one consisting of former and current police chiefs from the town and the region. A current Westerly Police Department patrol officer or detective will serve on one of the committees. The search became necessary Monday when the Town Council voted 5-2 to approve a separation agreement with former Police Chief Richard Silva, whose last day as chief was Wednesday. **Rooney** has refused to discuss why Silva left, citing personnel privacy concerns, and Silva did not respond to messages seeking comment on his status.

Silva's two-year tenure was marred by near-constant attacks by the International Brotherhood of Police Officers Local 503, the union that represents the Westerly Police Department's rank and file officers. The union was critical of former Town Manager Derrik M. Kennedy's decision to hire Silva rather than Capt. Shawn Lacey, at the time a 28-year veteran of the department who worked his way up the ranks from patrolman when he started in 1988 to second in command. Silva canceled a speaking engagement before the Westerly Lions Club after he was announced as Kennedy's choice for the job, but before his actual start date, when rumors of a planned police picket outside the meeting place circulated.

Upon starting he had to deal with several grievances filed by the union as well as a vote of no confidence approved by a majority of union members and later a call for his termination by the union. Town Councilor Mario Celico has continued to question the circumstances surrounding Silva's departure, saying **Rooney** misled the council during a private, closed-door executive session. "He said something in our session and then it proved to be inaccurate," Celico said Thursday.

Celico acknowledged meeting with Silva in the days before to his departure but said he followed Town Attorney William J Conley Jr.'s advice not to discuss what was then a proposed severance package. As part of the separation agreement, Silva agreed he would not file a lawsuit against the town, and the town agreed to pay him \$59,044 over the course of the next six months in increments equal to his normal biweekly pay. "I met with the chief because an accusation was made against him that if true would have shown a lack of professionalism on his part. The chief provided me with a document that showed the accusation was false," Celico said. Celico said he deliberately met with Silva at the Westerly Police Department. "Knowing full well that other people would see me," he said. Lacey, who is currently running the department, said Thursday, "I plan to pursue the position and am looking forward to and welcome the opportunity and hope that I'm selected" as chief. **Rooney** said the two interview panels would likely interview five to

# **Section 8**

# Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

seven candidates and recommend two or three finalists. The town's human resources director and a former police chief would do an initial screening of the resumes to determine which candidates are selected to be interviewed by the two panels. **Rooney** said he would interview the finalists and likely appoint one of them.

#### Lawsuit on age bias

In January, Lacey filed a lawsuit claiming that a law requiring all Westerly police officers to retire after 30 years is an attempt to circumvent age discrimination laws and is a violation of the state Civil Rights Act, the state Employment Practices Act and the federal Discrimination in Employment Act, which permits state and local governments to institute a mandatory retirement age of 55 for police officers. The law in question is a public law that applies to a specific town, as opposed to a general laws that applies to the entire state. **Rooney**, who started his position in April, directed Conley to let Lacey serve out the remainder of the current calendar year. The question of whether Lacey can continue working beyond Dec. 31 remains open. **Rooney** said he expects the court case to be resolved within 30 days, before he appoints a new chief.

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# **Section 8**

# Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

The Westerly Sun (RI) August 26, 2018

## **Town Manager Says Missing Laptop Reappeared After Threat of Prosecution**

Author: Dale P. Faulkner

A missing town-owned laptop that had been issued to the town's former human resources director was turned in following the threat of legal action, according to Town Manager J. Mark Rooney. Joshua Putman, who left his position in June, turned the laptop in after initially saying he did not know where it was and at other times saying a different town employee had it, Rooney said. Ultimately, Putman, who now works in Mansfield, Conn., gave the computer to Mark Tate, the town's information technology director, on Aug. 10, a few days after Rooney sent a Westerly police officer to Mansfield Town Hall. The device was a Dell Latitude that the town purchased in 2016.

Putman now serves as assistant town manager in that Connecticut town. Putman was hired by former Westerly Town Manager Derrik M. Kennedy, who left his position in Westerly to become town manager in Mansfield. Kennedy started his new job in May. "The former H.R. director forgot to turn in his laptop and said it didn't happen. I didn't believe him and he produced the laptop," **Rooney** said, adding that he "made it very clear that I would prosecute." Putman did not return messages left Thursday morning and Friday on his voicemail at Mansfield Town Hall.

**Rooney** also said Westerly town staff have found human resources computer files missing. Some of the missing files pertained to a background check performed on **Rooney** before he was hired to become interim town manager. Some other personnel and employee pension files are also missing, **Rooney** said. "He deleted the files in a very deliberate manner ... he did a work-around on defeating the server backup system so it was willful and deliberate and has caused a great deal of work for his assistant to recreate and in some cases start from scratch," **Rooney** said.

The missing files delayed the Town Council's ability to hire **Rooney** on a permanent basis and caused other problems, **Rooney** said. According to **Rooney**, Putman left instructions for other human resources staff telling them where to find various computer files, but, according to **Rooney**, the files did not exist. "It was very unexpected and unprofessional in the way he departed the organization, and we did not know until we tried to retrieve different information and it did not exist," **Rooney** said.

## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

The Westerly Sun (RI) August 26, 2018

### Rooney's Taking a Liking to Westerly

Author: Dale P. Faulkner

In his three months as interim town manager, J. Mark Rooney has orchestrated the response to a high-profile quarry blasting accident, helped devise a response to a summertime trash problem at the beach, and resolved one of the pending grievances that pitted the town's police union against town administrators. Rooney, during an interview Thursday, said getting involved with those issues and others ultimately played a role in his decision to see if the interim tag could be removed. The Town Council, pleased with **Rooney's** early performance, did just that, and he was sworn in as permanent town manager Monday. "After being the interim town manager for three months, I grew fond of the staff, and I saw the challenges and opportunities and issues, and they were very professionally rewarding, and it was a great opportunity," Rooney said. Rooney chose Westerly over other job possibilities. "I had a couple of opportunities in Florida, but when you have a job offer and you like where it is, why go to the next place? Florida might have nicer sand and warmer water, but it's the same ocean," Rooney said in the laid-back, straight-forward, folksy style that has emerged as a trademark characteristic. **Rooney** brings more than 20 years of experience as a municipal administrator in towns and villages in Illinois to Westerly. To his surprise, Rooney said, he has also become fond of his new hometown in New England, a region he said is not always embraced warmly in the broader town manager community. "I didn't think I would like New England. It doesn't have a good reputation in the business nationwide," Rooney said.

The complaints, **Rooney** said, center around a more difficult municipal budget process when compared to other regions in the country, concern that municipal business can move at a crawl if citizens excessively avail themselves of the right to speak during meetings, and an inclination toward "being parsimonious in pay." According to Rooney, when taken as a whole, New England towns pay their town managers and administrators less than any other part of the country. When the Town Council started its search to fill the vacancy created by the departure of former Town Manager Derrik M. Kennedy, the position was advertised as having a salary of \$120,000 to \$135,000. Eventually, members of the council agreed to consider paying more, and gave **Rooney** a base salary of \$160,000 per year with the possibility of financial bonuses for each year of the three-year agreement that Rooney signed Monday. To secure their investment, councilors insisted that **Rooney** be required to pay the town \$15,000 if he resigns within two years. The \$15,000 equates to the amount the council paid to a recruitment firm that assisted with the search that landed him. Town Councilor Mario Celico said Rooney's salary is a significant bump from what the town has paid town managers in the past. Kennedy was making about \$125,000 per year when he left. "It became clear that we really needed to step it up significantly," Celico said. It was Celico who asked Rooney to consider accepting a stable rate of base pay for three years. "I was concerned about the jump to \$160,000 and asked if he would consider an agreement with no guaranteed raises, and he agreed," Celico said. Rooney scored among the top three candidates in a matrix Celico used to rate the candidates, he said. The high

# Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

score combined with his performance as the interim manager led Celico to believe **Rooney** was a solid choice, Celico said. With less than three months remaining before a new Town Council is elected, **Rooney** and current Council President Edward Morrone cited a few goals and priorities for the new manager. Morrone said he joined his fellow councilors in selecting **Rooney** as town manager "because I believe he showed his ability during the interim period." His previous work and life experience were important factors too, Morrone said. "And I like his military background. I think it provides a certain approach and ability when difficult circumstances arise," Morrone said of the retired U.S. Army lieutenant colonel. As he starts his tenure as the permanent town manager, **Rooney** said he is working on issues related to the proposed harbor management plan, including ensuring there is adequate access to mooring fields and to the shoreline. Some of the rights of way or paths to the shoreline have been partially absorbed over the years by neighboring property owners. In the case of Watch Hill, **Rooney** said he plans to speak with property owners with the goal of "making a manageable path to get to the beach."

He plans to use a diplomatic approach in recognition of the property owners' willingness to let the public use East Beach, even though the beach is privately held, he said. Rooney is also working with Town Engineer Sheila Mc-Gauvran to develop a clear plan for improving town roads. A new color-coded map in Rooney's office shows all of the roads. Different colors are used to rank the roads by condition. Along with the harbor management plan, **Rooney** said one of his immediate tasks is to help usher through an ongoing revision of the municipal Comprehensive Plan, which sets out development and preservation goals and priorities. Regarding the town's finances, **Rooney** said he'll work to "improve or preserve" the town's bond rating, an indication of the town's financial condition and a factor in determining interest rates when the town seeks bond funds for largescale building and road projects. **Rooney** is also working with Finance Director Dyann Baker to change how the town shows its cash reserves in budget documents to improve transparency for taxpayers and for the bond rating. "That can help how the rating agencies review the town's financial status," Rooney said. The bond rating, **Rooney** said, is of critical importance as the town prepares to ask voters to approve a \$12.6 million road bond in November and as school officials develop a proposed elementary school bond project that could go to voters in 2019.

Rooney is also looking to review town ordinances and regulations with the hope of making it easier to do business and start new ones in the downtown area. Morrone pointed to getting both the comprehensive and harbor management plans done as high priorities. Negotiations with municipal labor unions and filing vacant positions are also at the top of the list, Morrone said. The council focused on carving out an employment agreement that provides stability for Rooney, especially since he signed on so close to the election, Morrone said. "We don't want the manager to feel that a council change puts him in any jeopardy," Morrone said. When Rooney first moved to the town, he was living in a small efficiency apartment above a High Street restaurant. He has since moved to a full-sized apartment on Canal Street. His wife and two high school-aged children have decided to stay in Illinois until his son graduates at the end of the coming school year. Rooney's other son is in college.

# Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

The Westerly Sun (RI) August 25, 2018

#### **Rooney OKs Pact to Settle Grievance**

Author: Dale P. Faulkner

A grievance filed by the International Brotherhood of Police Officers Local 503, the labor union that represents the rank-and file officers of the Westerly Police Department, has been resolved in the union's favor. A memorandum signed Aug. 3 by union President Patrolman Anthony Alicchio and Town Manager **J. Mark Rooney** outlines the agreement, which was struck while the grievance was pending before the American Arbitration Association and an arbitrator was about to hear the case. Arbitration is the final phase of the grievance process, which begins with the chief of police and then moves to the town manager and finally arbitration.

The grievance, which was filed in July of 2017, centers around the union's argument that its contract calls for the town to pay 82.5 percent of the cost of town provided health insurance and up to \$6,000 per year to retired police officers who wish to purchase additional health insurance until age 65. The memorandum of agreement concedes the union's stance on the contract language. As part of the agreement, the union agreed to withdraw the grievance.

Former Town Manager Derrik M. Kennedy had disputed the union's interpretation of the contract, which caused it to move to the arbitration phase. Kennedy, who negotiated the contract with the union, claimed the contract limited the town's contribution to a maximum of \$6,000 per year to be used toward the cost of the town-provided insurance. Robert Lombardo, a frequent critic of Kennedy's and town government in general, repeatedly said during Town Council meetings that the contract, which was approved in late 2016 and covers the period from July 1, 2016, to June 30, 2019, gave retired officers up to \$6,000 in reimbursement for extra insurance, but Kennedy stated repeatedly that Lombardo was misinterpreting the contract. The union later made the same claim, in the grievance, that Lombardo had made. Westerly Police Sgt. Paul Gingerella said the outcome in the union's favor "again goes to show that these aren't minor grievances we have filed and also shows the prior manager and current chief were wrong again." Westerly Police Chief Richard Silva said he allowed the grievance to move immediately to Kennedy. "I really had no involvement with the grievance. It was an issue between the former town manager and the union involving interpretation of what was then the new collective bargaining agreement as it pertained to health care benefits in retirement," Silva said.

**Rooney** said he interpreted the contract more broadly than Kennedy and believes the union's interpretation of the contract will not create a significant expense for the town. "The amount of ill will and anger that it generated for that [small of a] potential savings was so slight that it made no sense to me to have a fight on something I could resolve and not have another issue that would damage employee morale and trust," **Rooney** said during an interview Thursday.

## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

The Westerly Sun (RI) July 8, 2018

### 'Staunch Support' for Silva

Author: Dale P. Faulkner

The Rhode Island Police Chiefs' Association has entered the fray in the spat between members of the Westerly Police Department and town management. In a June 28 letter to interim Town Manager **J. Mark Rooney**, the association announced its "staunch support" for Police Chief Richard Silva. In May, the International Brotherhood of Police Officers Local 503, the labor union that represents the Westerly department 's rank-and-file officers, wrote to **Rooney** to inform him that its members had approved a vote of no confidence in Silva, who has served as chief since November 2016. The union wrote to **Rooney** again on June 13 and asked for the removal of Silva from his position.

Col. James J. Mendonca, president of the police chiefs' association, in his letter to **Rooney**, said Silva has "demonstrated an unparalleled level of professionalism" and has displayed selfless and devoted service to the organization during his four years on the association's executive board. Mendonca is police chief in Central Falls. Silva currently serves as vice president of the association. Silva has faced intense scrutiny from members of the local union since he was selected by former Town Manager Derrik M. Kennedy over Capt. Shawn Lacey, the other finalist for the position.

Lacey has worked for the department for about 30 years, starting as a patrol officer and working his way up through the ranks. The union announced its displeasure with the selection of Silva before he even started and members of the local police honor guard refused to participate in his swearing-in ceremony. The letter from the police chiefs' association was intended "as a character rebuttal with regard to the unfortunate events that have taken place within the Westerly Police Department - namely the 'no confidence vote' in opposition to Chief Silva - which is clearly void of substance and veracity," Mendonca wrote.

Town Council President Edward Morrone on Friday said the council will have little if any involvement with the ongoing clash involving the union's dissatisfaction with Silva. "Obviously it's the manager 's issue. He makes the appointment," Morrone said. Given **Rooney's** unfamiliarity with many of the issues, Morrone said it seems unlikely that he would act on the union's request. **Rooney** started his interim post on May 7. "I don't think the manager's in a position to, in any way, make this type of decision, at least not in the short term," Morrone said.

According to Morrone, **Rooney** is monitoring the situation and has communicated with the union and with Silva about the situation. Morrone said he has no reason to believe that members of the department are compromised in their ability to perform their duties. "I haven't been advised by my constituents of any such problem. I think the citizens of Westerly can rest assured they're protected and this does not seem to be affecting the delivery of the department 's vital service," Morrone said. Mendonca asked **Rooney** to consider the entirety of Silv a's work in law

# **Section 8**

# Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

enforcement. He came to Westerly after completing a 28-year career in West Warwick, including eight as chief. "Chief Silva is a valuable and respected member of the law enforcement community that the RIPCA relies on heavily. It is with hopes that you see his value and leadership, and balance the hollowed accusations against him with his career accomplishments," Mendonca wrote.

The Fraternal Order of Police Association Lodge 10, a Westerly-based lay group that supports the town's police officers, has also inserted itself into the debate. The association wrote to **Rooney** and the Town Council on June 12 and called for Silva's dismissal. **Rooney**, Silva, Mendonca and Patrolman Anthony Alicchio, president of the Local 503, did not respond to messages seeking comment for this article.

## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

**[CB&A Note:** The following article is one of several that follow related to **Mr. Rooney's** departure from the city of Carpentersville and a subsequent lawsuit. To summarize the situation, towards the end of **Mr. Rooney's** tenure in Carpentersville, the elected body made it clear it was time to part company and sent him home while they negotiated an exit agreement. Several weeks later, the Board withdrew its offer, stating he had voluntarily resigned when he ceased coming to work and denied him the severance money it was obligated to pay in the contract. **Mr. Rooney** subsequently pursued the matter in court. Ultimately, he was made whole financially and the city paid his legal fees. The net impact on Carpentersville is it paid about \$120,000 more than if it had simply honored the terms of the contract.]

The Daily Herald (IL) June 22, 2018

# Former Village Manager Sues Carpentersville, Seeking Severance

Author: Lauren Rohr

Carpentersville is being sued by former Village Manager **Mark Rooney**, who claims the village fired him five months ago and refused to pay him severance -- a violation of his contract. The village board voted in January to accept what it considered **Rooney's** "voluntary resignation," saying he had stopped reporting for work. The move came after weeks of negotiations surrounding **Rooney's** employment. The lawsuit filed Wednesday in Kane County argues **Rooney** was placed on involuntary leave, then terminated from the position he held for seven years. He never received the \$190,000 owed to him in severance and benefits, the suit says. It seeks at least \$217,000 in compensatory damages for breach of contract and violation of the Illinois Wage Payment and Collection Act. As of Thursday, village officials said they had not been served with the papers.

The complaint claims Village President John Skillman, the former fire chief, was "determined to terminate" **Rooney** since being sworn into office in May 2017. It also lists several instances in which Skillman apparently told **Rooney** he intended to fire him. As fire chief, Skillman underwent a disciplinary interrogation in 2016, at which point **Rooney** asked him to retire in lieu of being terminated, the suit says. Skillman was elected village president a year later, and three other newcomers were either elected or appointed to trustee seats by the time the village board started evaluating the manager position. Skillman said Thursday he never stated he would fire **Rooney**. He said the complaint is full of "inflammatory comments" personally attacking him. "This is about a contract. This is not about myself or any of the village board members," Skillman said. "It has nothing to do with what he's looking for (or) his end result. I'm really surprised to see him making these statements." Village Attorney Brad Stewart declined to comment, saying it would be "premature and negligent" to provide a statement before thoroughly reviewing the document.

According to his employment agreement, **Rooney** was entitled to nine months' severance pay at his annual salary of \$176,710, plus benefits and some unused sick time, if he were fired after five years. The contract also says **Rooney** can be deemed to be terminated -- granting him the

# Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

severance compensation -- if he resigns at the village board's suggestion. When **Rooney** left the village, Carpentersville's then-attorney, Hart Passman, said **Rooney** was not entitled to that money because his resignation was voluntary. "He packed up his office and left," Skillman said. "He was never fired or terminated until he abandoned his post and didn't follow his own policy," which states that multiple days of unreported absence is deemed a voluntary resignation.

**Rooney's** employment was the topic of various special meetings from Dec. 12, 2017, to Jan. 24, 2018. During that time, **Rooney** turned down multiple separation agreements proposed by the village board, none of which offered the full severance allotted to him through his contract, according to the suit. After closed-session discussions Jan. 6, attorneys for both parties agreed **Rooney** would be placed on involuntary leave and would be paid through accrued benefit time while negotiations continued, the suit says. He received compensation for a two-week pay period ending Jan. 13. In a Jan. 8 email obtained by the Daily Herald, Skillman told department leaders **Rooney** moved his belongings out of his office Jan. 5 and would not return to work. He said **Rooney** had requested a separation agreement and advised the employees not to contact him.

The village board voted in open session Jan. 16 to approve a separation deal, which Skillman said was being finalized by attorneys. When the parties were still unable to reach an agreement, trustees rescinded the offer a week later and accepted **Rooney's** voluntary resignation, effective Jan. 5. The lawsuit calls **Rooney's** resignation "a fiction" and says his employment was terminated without cause. **Rooney's** attorney, Patrick Walsh, said **Rooney** declined to comment beyond what is in the complaint. The parties are due in Kane County court Sept. 5.

## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

The Westerly Sun (RI) May 8, 2018

First Day on the Job Town Welcomes Interim Manager

Author: Dale P. Faulkner

On the night of his first Town Council meeting Monday, **J. Mark Rooney** was provided with a glimpse into a perennial topic of discussion - parking in Watch Hill. **Rooney** took his oath of office earlier in the day and then again during a ceremony at the start of the council's meeting. A 15-minute-long reception followed the ceremony, giving **Rooney** a chance to meet residents who were either on hand for other agenda items or who came to meet him.

The parking discussion had its origins in a proposal to lift a parking ban on Bluff Avenue to add 13 to 27 new parking spaces for the public. The Bluff Avenue proposal grew out of efforts last year to establish drop-off zones to improve shoreline access in Watch Hill and Misquamicut. On Monday, the Town Council agreed, by unanimous consensus, to drop the Bluff Avenue proposal after hearing the Watch Hill Fire District Council's proposed alternative - to establish seven parking spots in the district's Larkin Road parking lot for Westerly residents.

The spots would be free for residents parking for up to three hours. The district also plans to create a drop-off loop in the lot where an estimated three vehicles could pull in at a time, drop off their passengers, and then drive out of the lot without being charged. The lot will also be available for free after 5 p.m. in the hope of making parking available for residents. Rather than simply stand in opposition to the Bluff Avenue parking proposal, Randy Abood, Watch Hill Fire District moderator, said district officials developed the Larkin Road parking lot idea in the spirit of "seeking the common good and solutions."

Abood was joined by other district officials as well as property owners and representatives of businesses and other organizations including Daniel Hostettler, president and managing director of Ocean House Management, which runs the Bluff Avenue resort hotel, and Deborah Lamm, Watch Hill Conservancy chairwoman. Allowing parking on Bluff Avenue would detract from the look and feel of the village and could hurt business at the Ocean House, an important part of the town's tourism economy, Abood said.

Town Councilor Philip Overton praised the citizens of Watch Hill for "working in good faith." "I'm very impressed that in the spirit of community you have come forward with these really good ideas," Overton said. The fire district also plans to install an automated gate system and a security camera at the lot. Abood said he is in discussions with the district's legal advisor to determine whether the gate proposal will require approval by the district's voters. Regardless, he said, the drop-off loop and seven spaces for Westerly residents can be established immediately.

**Rooney** also witnessed another important aspect of the town - a group of citizens who pay attention to their local government. Hatsy Moore, a former Town Council member and a resident

# **Section 8**

# Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

of Watch Hill, took to the podium in Council Chambers to raise questions about the Larkin Road parking plan, saying it did not align with previous commitments made to Misquamicut Club members and residents who invested in the Lanphear Livery parking lot. "Welcome **Mr. Rooney**, I am your and the council's worst nightmare, but I have a sense of humor, and I've been threatened with being handcuffed," she said, alluding to a previous meeting during which she was asked to hold off from commenting at the podium because she was trying to speak at an inappropriate time.

## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

The Westerly Sun (RI) April 26, 2018

## J. Mark Rooney of Illinois is Council's Choice for Interim Town Manager

Author: Dale P. Faulkner

The Town Council is prepared to offer the position of interim town manager to **J. Mark Rooney** of Highwood, Ill., pending completion of a background check. The council voted 6-0 Thursday in favor of offering the position to **Rooney**, contingent upon successful clearance of a background check that started Wednesday when the council named him one of two finalists for the job. Councilor Mario Celico did not attend the meeting. The decision followed a nearly 90-minute-long executive session of the council. A retired U.S. Army lieutenant colonel, **Rooney** has more than 20 years experience working in municipal government in four municipalities and villages in Illinois.

Councilor Philip Overton said **Rooney's** resume describes a career of "powerful leadership" and a "history of success as a town manager." "He's a great candidate," Overton said. According to his resume, **Rooney** received a Bronze Star for valor and a Combat Action Badge. He was wounded while in Iraq, where he served during Desert Storm and Operation Iraqi Freedom. He served as village manager in Carpentersville, Ill., from 2010 until January, and as chief of staff in North Chicago in 2009-10. He was village manager of Wheeling, Ill., in 2006-09, where he previously served as assistant village manager for three years. His resume also includes a stint as a staff assistant to the late U.S. Sen. Paul Simon, D-Illinois.

Hatsy Moore, a resident and close observer of local governmental affairs, asked the council why it was considering candidates who live so far from Westerly. The other finalist lives in Ohio. Moore also read from a petition that circulated in Carpentersville toward the end of **Rooney's** tenure there. The petition sought his removal as village manager. According to news accounts, **Rooney** ultimately resigned from the position. Moore also criticized the council for conducting interviews in executive session and for revealing only the names of three of the six candidates who were interviewed; 14 candidates submitted resumes. "These three candidates who were interviewed, we have no idea who they were. There was no input from the public, there was no information to the public but you people committed to transparency and open government," Moore said.

Councilor Jean Gagnier said he was not surprised that someone would look to leave Illinois, which is beset with serious economic problems. "Let me see, why would someone want to move here? Why would someone want to live near the ocean in a community that has a low tax rate and has a good balance sheet and is paying its pension liability as opposed to Illinois or Ohio?" Gagnier asked. Gagnier also said that the candidates for the job were allowed, under the state Open Meetings Act, to choose to have their interviews conducted in private. When council members decided on two finalists, they asked the two candidates if they could release their names and the candidates consented, Gagnier said. "We wanted their names out. We wanted them to be vetted," Gagnier said. Council President Edward Morrone, after the meeting, said

# **Section 8**

# Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

that **Rooney** discussed the end of his tenure in Carpentersville. "I'm comfortable that he disclosed everything we should know about the situation," Morrone said. The council also completed the requirements and criteria it will seek from candidates for the permanent town manager position. The vacancy will be posted on the International City/County Management Association website starting Monday. Resumes will be solicited for 30 days. Today is current Town Manager Derrik M. Kennedy's last day on the job after about 2.5 years in the position. He is leaving to become town manager in Mansfield, Conn.

# Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

Chicago Tribune (IL) January 25, 2018

Ousted Carpentersville Manager Resigns, Board Withdraws Separation Deal: Officials Author: Erin Sauder

Carpentersville trustees on Wednesday withdrew their separation agreement offer to **J. Mark Rooney**, saying the village manager voluntarily resigned when he stopped showing up for work earlier this month. Last week, the Village Board unanimously approved offering the deal to **Rooney**, who was hired as village manager in 2010. Village President John Skillman said at the time that attorneys were working out the terms. Trustees also approved naming Marc Huber, Carpentersville's assistant village manager/director of community development, as acting village manager on an interim basis. The board reconvened Saturday to continue discussing the separation agreement. At issue, according to village attorney Hart Passman, was the inclusion of a nondisparagement clause, a provision that means neither party can make negative comments about the other. "Mr. Skillman mentioned there was room for the attorneys to work out the details. We've been unable to do so," Passman said Saturday. "Mr. Rooney did not accept the village's effort to compromise on that provision."

During this week's board meeting, Trustee Diane Lawrence motioned withdrawing the village's separation agreement offer, saying **Rooney** voluntarily resigned his employment when he stopped coming to work. "Records indicate the last day he reported to work was Jan. 5. At that time, he cleared out his office of his personal belongings," Lawrence said. "According to the employee handbook, any employee who fails to come to work without notifying the village will be considered voluntarily resigned from the village. I motion to accept his voluntary resignation." Her motion was approved 4-2, with trustees Paul Humpfer and Don Burroway dissenting. "While the village was trying in good faith to find an agreeable solution to the subject of **Mr. Rooney's** employment, we identified that he had cleared out his office and stopped reporting to work," Skillman said in a statement following Wednesday's vote. "There is no circumstance in which an employee can just stop reporting to work and expect to maintain their status as an employee or expect taxpayers to foot the bill for a substantial salary and benefits package."

He added that the board had already been in the midst of addressing whether **Rooney** was the correct person to serve in the role of manager. "His voluntary resignation allows us to focus on moving the village forward in a new and better direction," Skillman said. "We are not interested in drawing unnecessary negative attention to **Mr. Rooney**, who we recognize has added some degree of value to the village in the past. But in the interests of openness, I do say that there have been increasing and continuing concerns regarding **Mr. Rooney's** communications with stakeholders in the village, his administrative decisions and his fiscal management of the taxpayers' resources." **Rooney** could not be reached for comment. Prior to coming to Carpentersville, **Rooney** was the village manager for Wheeling from 2006 to 2009 and Wheeling's assistant village manager from 2003 to 2006.

# **Section 8**

## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

Daily Herald (IL) January 16, 2018

### Carpentersville Approves Separation Deal with Village Manager

Author: Lauren Rohr

The Carpentersville village board Tuesday night approved a separation agreement with Village Manager Mark Rooney, who has served in the position for more than seven years. Village officials did not immediately release the details of the agreement, and Village President John Skillman declined to comment. The unanimous vote came after a nearly hourlong discussion in closed session, in addition to a two-hour closed session during a Jan. 6 special meeting. The measure was not discussed in open session. "I will leave my position with a sense of accomplishment and thanks for all I have learned through the inevitable challenges with a position such as mine," Rooney said in a statement to the Daily Herald. "I served with a specific set of values and principles with the overriding goal to make the lives of Carpentersville residents better." Trustees also voted Tuesday to appoint Assistant Village Manager Marc Huber to the interim manager role, effective immediately. Rooney, an Army veteran, was hired as village manager in 2010. Last year, he was earning a salary of \$175,710 plus benefits, according to village records.

During his tenure, trustees supported two amendments to **Rooney's** employment contract, the most recent of which included a 5.5 percent raise that brought his annual salary up to \$167,000 in 2015. His salary was adjusted each year based on performance evaluations by the village board, according to the contract. The village board has seen significant turnover since Skillman, a retired Carpentersville fire chief, beat out incumbent Ed Ritter for village president last spring. Voters elected newcomer Diane Lawrence to a trustee seat, and Skillman later appointed John O'Sullivan and Jeff Frost to fill vacancies on the board. "In this era of compressed time, constant commentary and polarized politics, things do not always work as they should," **Rooney** said. "Elections have consequences. I leave my position with my head held high."

In his statement, **Rooney** thanked trustees and Ritter for working cooperatively "with a mutual sense of respect and trust." He lauded the village's improved transparency rating, the creation of a community development department, new economic activity such as the Walmart Supercenter, and various other accomplishments in the last seven years. Skillman said no decisions have been made for finding a permanent replacement for **Rooney**. The village board is expected to discuss its next steps at a later date. **Rooney** previously served as village manager in Wheeling, a position from which he resigned in 2009. At the time, two trustees said his departure came after a majority of the board indicated in closed session that they no longer supported him. Before Wheeling, **Rooney** served as village administrator in Highwood.

## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

Daily Herald (IL) June 29, 2017

### Carpentersville OKs Settlement with its Former Director of HR

Author: Lauren Rohr

Carpentersville's human resources director resigned last month after village officials indicated they were contemplating her termination, according to a separation agreement. Samantha Brunell, who had been on the job since last July, was placed on administrative leave May 10 while the village assessed her performance and the needs of the department, Village Manager Mark Rooney said in a memo to the village board. She resigned from the position six days later as part of a settlement that would pay her salary and benefits through June 30.

What led to Brunell's departure — and the village's roughly \$13,738 payout — remains unknown. **Rooney** declined to discuss personnel matters, and Brunell was unavailable for comment. Under the agreement, which was approved last week by the village board, both parties are releasing one another from any "claims, demands, causes of action or liability" related to Brunell's employment or departure. Brunell will also receive a letter of reference from **Rooney**.

In addition to her human resources role, Brunell served as the assistant to the village manager and handled public relations responsibilities. She was employed in the finance department, and her starting salary was \$70,000. Carpentersville officials are now working with an outside consulting firm, GovHR USA, to review the vacant position and consider a possible staffing reorganization, **Rooney** said.

Jeff Monteleone, the village's senior management analyst, is taking over Brunell's human resources duties on an interim basis with help from **Rooney** and Assistant Village Manager Marc Huber. The village will not backfill the analyst position until they determine whether Monteleone is a good fit in human resources, **Rooney** said. Additionally, he said, department heads have been trained to handle some public relations responsibilities, such as writing news releases. The village might also consider hiring part-time consultants to help with special projects. **Rooney** said the review and reorganization period is expected to be complete by the end of August, when planning for the 2018 budget cycle begins.

# **Section 8**

## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

Courier News (IL) March 30, 2017

# Carpentersville, Illinois Policy Institute, Website Transparency Carpentersville Lauded for Transparency

Author: Erin Sauder

Carpentersville has been recognized by the Illinois Policy Institute for its "highly transparent" municipal website. "This kind of transparency is critical for trust," Village Manager **Mark Rooney** said in a news release. "We strive to make sure we remain accountable to our taxpayers." The transparency score of 96.2 percent represents nearly a 5 percent improvement since the last audit in December, and more than a 45 percent increase since 2013. Those scores were 91.6 percent and 50.6 percent, respectively.

The Illinois Policy Institute ranks municipalities, townships, school districts, libraries and other entities for transparency based on their websites. "Over the past few years, the IT Department has consistently worked with the village board, village manager, and village staff to evaluate ways to redesign our website in order to make key information more readily available to our citizens and businesses," said IT Director Kevin Goethals.

After receiving the dismal score in 2013, a new page was created dedicated to government transparency (cville.org/Reference-Desk/Website-Transparency.aspx) and allows searching through links to all of the information from a 10-point transparency checklist in just one click. The checklist evaluates how accessible it is to find information on a municipality's taxes and fees, lobbying activity, bids and contracts, salary and benefits, expenditures, financial audits, budgets, public records, meeting information, and contact information for elected and administrative officials.

Carpentersville received perfect scores in seven out of the 10 categories on the checklist in the latest audit. "Our goal is to reach 100 percent transparency," Goethals said. "We want Carpentersville residents to have the ability to easily contact village officials, while making key village information readily available to anyone visiting our website."

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# Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **J. Mark Rooney** is listed below.]

https://www.ilcma.org/programs-and-services/awards-program/special-service-award/

# J Mark Rooney

2016

# ILCMA SPECIAL SERVICE AWARD

### **QUALIFICATIONS**

The Special Service Award is presented to individuals who have notable association or affiliate activity and significant professional accomplishments, including private interests, family interests, acts of heroism, charitable acts, or social accomplishments.

### 2016 Mark Rooney

For his outstanding service and leadership to the local government management profession as shown through his support of members in transition.

## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

Daily Herald (IL) June 23, 2016

### Lawsuit Headed Back to Court, with a New Judge

Author: Lauren Rohr

A lawsuit filed by East Dundee officials, who are trying to prevent Wal-Mart from obtaining more than \$4.3 million in special taxing funds for its new Carpentersville store, is headed back to court, this time with a new judge. East Dundee Attorney Tom Gardiner said state law prohibits tax increment financing funds from being used to entice a business to relocate within 10 miles. Because the new store is less than three miles away, East Dundee argues Wal-Mart does not qualify for TIF funds, Gardiner said, noting the village wasn't trying to stop the store from opening. Kane County Judge David Akemann dismissed the lawsuit last year, saying East Dundee's case lacked standing. The village appealed that decision, as well as an order denying the village's motion for a substitution of judge.

After the appellate court decision Monday, the lawsuit will go back to the circuit court, and East Dundee can continue making its case in front of a new Kane County judge. The decision also means Akemann's ruling is void. "This shows we have standing, we have merit in this case," East Dundee Village President Lael Miller said. "The important thing is for us that this validates the fact that we did have a valid case and that the previous judge's ruling is tossed out."

Carpentersville Village Manager **Mark Rooney**, who argued the village did not violate TIF laws, said the appellate court decision to put a new judge on the case doesn't mean Akemann's initial ruling isn't valid. Wal-Mart and Carpentersville officials have argued the company's decision to move was market driven and a result of circumstances beyond its control. "It's a meritless case," **Rooney** said. "It's a complete waste of the taxpayers' money in East Dundee, and now they're also wasting Carpentersville taxpayers' money to defend a meritless case." **Rooney** said the village has not yet decided its next steps.

In a TIF district, the property tax revenues that go to local governments are frozen for up to 23 years at a certain level, which is set on a base assessed property value. Any taxes generated above that level can go back into redevelopment. The new Wal-Mart Supercenter in Carpentersville held its grand opening early Wednesday. East Dundee estimated it would lose an estimated \$60,000 to \$80,000 per month in sales tax revenue after the closing of its Wal-Mart store.

# **Section 8**

## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

Daily Herald (IL) April 27, 2016

### Carpentersville Firefighter's Union Seeking Arbitrator in Disputed Layoffs

Author: Lauren Rohr

Amid contract negotiations with the village, the Carpentersville firefighter's union is asking an arbitrator to negotiate the layoffs of two full-time firefighters. The layoffs took effect Friday, but the union filed a grievance last month after they were announced, claiming the move violated the current contract, which expires at the end of the month, said Rick Nieves, president of the Carpentersville Professional Firefighters Union. But the union and the village disagree vehemently on the circumstances that resulted in the layoffs, mainly centering on cost savings.

In 2014, the union and village signed a "side letter" agreeing to a swing shift, which moves firefighters from normal to short-staffed shifts. The agreement called for the village not to lay off any firefighters during the duration of the contract, as long as the swing shift structure saved \$75,000 annually. "It's the village's position to end our side letter because the savings that were promised did not materialize," Village Manager **J. Mark Rooney** said. Nieves said the swing shift did reduce overtime costs by \$75,000, but the village used the additional funds ineffectively, "not at the fault of the union." He also argued the layoffs wouldn't result in significant cost savings, as the village would have to pay overtime costs and part-timers to make up for the loss. "We strongly feel that these layoffs are not really necessary and are against the agreement we had with them this last time around," Nieves said. "We don't feel there's a true bona fide economic problem." The two parties were unable to come to a resolution during negotiations, Nieves said, and the union is requesting a third party to settle the dispute.

**Rooney** said he made an offer during contract negotiations to postpone the layoffs until the end of negotiations, but it was rejected by the union. "If we didn't find the savings, (layoffs) could've still happened," **Rooney** said. "But it wouldn't have to happen until that point in time when we concluded those negotiations." Nieves said the union never received a formal offer to stave off the layoffs. Instead, he said, **Rooney** indicated he would rescind the layoffs if the union paid the full salaries and benefits for the two firefighters. **Rooney** denied such an offer was ever made.

Contradicting statements from both parties don't end there. Nieves claimed the fire department is the only unit in the village experiencing layoffs, while **Rooney** says cuts are being made across several other departments. Nieves says the two firefighter layoffs would save only \$20,000 per year, and **Rooney** argues it'll result in about \$100,000 in net savings. **Rooney** said the union linked negotiations about the layoffs to an unrelated issue: Allowing firefighters to wear shorts while on duty. Nieves said the union always handled the two issues separately. Now, Nieves said, arbitration is the union's last chance to restore the firefighters' jobs. "I'm hoping at some point in the near future (the village will) still rescind the layoffs and we can come together," Nieves said. "Losing two guys is an unfortunate situation, not only for the community but also for the guys and their families."

## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

Courier News (IL) March 18, 2016

Carpentersville, Branding, Spring Hill Mall, Meadowdale, District 300 Carpentersville Trying to Change Village's Public Perception

Author: Erin Sauder

Carpentersville officials know that changing the village's public perception could be an uphill battle. But it's one they're willing to take on. About 30 individuals, including staff and board and commission members, took the first step in the branding campaign process by attending a brainstorming workshop Wednesday, led by Bill Balling, managing director of the WRB LLC consulting firm. His colleague, Adriane Johnson, an associate consultant, also attended the workshop. "Branding is essentially everything you do," Johnson said. "It isn't just the logo. It's a specialized type of marketing to help tell a community's story. It gets to the foundation of what makes a place desirable. It's also what people say about you when you're not around."

She said the goal of branding is to enhance and/or improve the community's image and attract the desired residents, businesses and visitors. Attendees were asked to weigh in on the village's strengths, weaknesses, opportunities and ultimate threats. Carpentersville's industrial base, diversity, residents, services, walkability, location and long-range planning topped the list of the village's strengths. "Most of our town is pretty well kept up," Village President Ed Ritter said. "There's some dark spots here and there and we have to keep fighting them but that percentage is much lower than it was 10 or 12 years ago."

As for the village's weaknesses, "public perception," said former trustee Kay Teeter, who is currently a member of the Business Development Commission. "That's huge." "The lowest hanging fruit on the weakness side is the perceived level of crime and the actual level of crime which is lower than our surrounding communities," added Trustee Kevin Rehberg. "There are metrics out there that prove this." Traffic flow and the negative perception of the area's public schools were also noted as weaknesses.

Village Manager Mark Rooney said the village's business corridors also provide a challenge. "We have Randall Road, Route 31 and Route 25 — they don't have any correlation," he said. "There's a very different challenge of marketing Randall Road than Route 25." As for Carpentersville's opportunities, the riverfront was suggested. "Our section isn't developed yet," Rehberg said. "You can't get a motorboat in there. You have to paddle, with a canoe or kayak. But the fishery has rebounded tremendously. When you get to the Dundee area it turns more urban. We're in this transition zone between a highly boatable area to this urban Dundee area." He added the village "has a real opportunity to make ourselves attractive to new families that are fleeing Chicago." "Most people don't want to raise families in the Chicago public schools anymore," he said. Trustee Jeff Sabbe said District 300 also "is a huge opportunity for us." He cited the district's partnership with Elgin Community College which is allowing qualified high school seniors the opportunity to enroll at ECC full-time and earn up to 32 college credit hours, tuition free. Another suggestion was implementing community events throughout the year

# Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

instead of just spring through fall. As for threats to the village's success, declining equalized assessed values, lack of revenue, and Spring Hill Mall were mentioned. Rouse Properties, which owns Spring Hill Mall, asked to partner with both Carpentersville and West Dundee to bring the \$40 million renovation project to fruition. Plans call for a movie theater, restaurants, and a new layout. Mall officials were seeking \$8.6 million total in financial assistance from Carpentersville and West Dundee, with the majority, about \$7.4 million, coming from the latter since most of the shopping center falls within the village. Carpentersville's ask is about \$1.2 million. "Two villages have spent a lot of time and money but it is very possible that mall will fail," **Rooney** said. "That's a pretty big threat."

He cited the Meadowdale property which runs from Besinger Drive to Lake Marian Road. At one time, the shopping center on the property was a popular draw due to anchor stores such as Wieboldt's and Woolworth's. It was such a high-trafficked area in 1960 that John F. Kennedy delivered a stump speech there while running for president. "That threat would be a repeat of what happened to Meadowdale and create a perception problem," **Rooney** said. "It went from a JFK rally point to nothing." The next workshop on the initiative is set for next month. "I'd like you to think about and reflect on the topic we're discussing this evening and come back in early April and get additional feedback," Balling said.

## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

Daily Herald (Arlington Heights, IL) September 18, 2015

#### Ex-Kaneland teacher settles federal lawsuit over DUI arrest

Author: Harry Hitzeman Legal Affairs Writer

A former Kaneland School District 302 teacher has settled a federal lawsuit against Carpentersville police that argued he was roughed up after a 2010 DUI arrest. Ryan Wlodek, 35, of Elgin, reached a settlement last month after suing the village of Carpentersville, along with Officers Donald Wells and Matthew Lipke, records show.

Carpentersville Village Manager **Mark Rooney** said officers did nothing wrong and the village wanted to fight the lawsuit. However, the village's insurance carrier decided it would be better to pay \$7,500 in a no-fault settlement than to go to trial and pay some \$20,000 in legal fees, plus risk more in damages if the village lost the case.

"He was not in any way mistreated. The officers did nothing wrong," **Rooney** said. "(The insurer) made a business decision that the village didn't support but had no power to stop. It would have been more costly to defend."

Wlodek initially was charged with felony obstruction of justice, DUI and attempted fleeing and eluding and stemming from his July 4, 2010, arrest. After years of delays in his case, he pleaded guilty to the reduced charges of misdemeanor DUI and obstruction of justice earlier this year and was sentenced to court supervision, records show. He was charged with felony obstruction because he refused a breath test and wanted his blood drawn at a hospital instead. Wlodek, a former science teacher at Kaneland High School and most recently a teacher at Kaneland Middle School, resigned from his post effective Sept. 11, according to the school district.

Wlodek filed an excessive force lawsuit in 2012 against the village and officers. In the lawsuit, Wlodek argued he was punched in the groin and officers purposefully drove erratically, turning quickly to slam him from side to side while he was handcuffed and in the rear of the squad car.

David Lipschultz, the attorney representing Wlodek in the federal lawsuit, said he "could not comment at all" on the lawsuit or settlement when reached by phone.

Jeannine Gilleran, an attorney who represented the village and two officers in the lawsuit, did not return messages.

Federal Judge Charles Norgle dismissed Wlodek's suit "with prejudice," meaning it cannot be refiled in the future.

## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

Daily Herald (IL) April 30, 2015

#### Carpentersville Manager Gets 5.5% Raise in New Village Budget

Author: Madhu Krishnamurthy

Carpentersville village leaders approved a 5.5 percent pay raise for Village Manager **Mark Rooney**, part of a roughly \$46 million budget of expenditures for the remaining eight months of this year, which officials say includes no staffing or service cuts. **Rooney's** yearly salary goes up from \$158,000 to roughly \$167,000 retroactive to Jan. 1. He also gets five more vacation days (25 in total) and guarantees nine months of severance pay that equals his current pay, plus fringe benefits, if he is fired after five years of service for any reason other than being convicted of a felony.

**Rooney** said the salary increase is comparable to what managers/administrators of neighboring communities receive. "I'm still nine out of 10 in the ranking of salaries (of managers)," **Rooney** said. "I just bumped ahead of Lake in the Hills village manager." **Rooney** received a similar salary increase last year, as did a few other department heads.

Chris Scholl, a firefighter who ran unsuccessfully for the village board in April, said **Rooney's** pay hike is "fiscally irresponsible at a time when the village is talking about deficits." "What concerns me is also that this contract spells out his severance package, and severance packages should be dealt with at the time for severance and based upon the reasons for that severance," Scholl said. "The taxpayers should not be on the hook for (paying) \$125,000 plus the fringe benefits ... he will also be compensated for unused vacation time and unused sick leave, which no employees get in the village."

**Rooney** said the increases are justified by how much money the village has saved through his leadership. "I had a good year last year," **Rooney** said. "We successfully got a \$400,000 OSLAD (Open Space Lands Acquisition and Development Program) grant and a U.S. EPA (Environmental Protection Agency) grant of \$628,000. Wal-Mart Supercenter successfully coming to town is a pretty significant event, which will be \$1 million in sales tax (revenue) every year."

The Wal-Mart project — targeted for 26 acres along Lake Marian Road and Route 25 — is a nearly \$30 million development, which includes a \$4.3 million village incentive funded through a special taxing district to help with site improvements, such as the widening and signalization of Lake Marian Road, said Joe Wade, assistant village manager. Construction of the supercenter is expected to begin this summer and open by fall of 2016, officials said.

The village seems to have turned the corner after eliminating 34 positions during the past four years through layoffs, consolidation, reorganization, retirements and attrition. No personnel cuts are in this budget, **Rooney** said. "We save on an annual basis on salary and health care costs of over \$1.5 million," **Rooney** said. The village also has saved roughly \$195,000 by refinancing an

# **Section 8**

## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

IEPA loan earlier this year, and nearly \$100,000 in yearly debt service when borrowing \$10 million for infrastructure improvements that will be completed over four years, he added. The 2015 budget includes a salary increase of 1 percent for public works employees, and 3 percent for police and firefighters. On average, personnel costs increased 2.2 percent, and health insurance costs increased 2.5 percent, Finance Director Hitesh Desai said. The village will be spending nearly \$10 million on water and sewer improvements, and \$3.5 million on infrastructure projects this year, and roughly \$2 million on water main and road improvements related to the Wal-Mart project, in addition to the business incentive. Starting next year, Carpentersville will follow a calendar year budget once the tax levy is determined in December, officials said.

## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

Courier News (IL) April 5, 2015

#### In Wake of Spat, Official Hires Private Detective

Author: Mike Danahey

Carpentersville Village Manager **Mark Rooney** said he is spending his own funds on a private detective after a March 14 altercation with a member of the Finance and Audit Commission. Harry Brown, of H. Brown Investigations, said he was hired by **Rooney** shortly after the incident with Humberto Garcia. Garcia, a Carpentersville trustee candidate, filed a police report regarding **Rooney's** actions during and outside a Finance and Audit Commission meeting March 14 at the town's public works building. "**Mr. Rooney** has a reputation to protect, with military service and an exemplary career," said Brown.

During the March 14 session **Rooney** questioned claims some people in town and some firefighters have been making that the Fire Department is understaffed. Garcia responded that he had heard those claims and that the department is understaffed. He asked **Rooney** if those people are lying. **Rooney** asserted that they are lying, noted Garcia has been on the commission for several years and that the numbers were there before him.

**Rooney** commented, "If you can't figure it out, I can draw you a picture. But if you can't understand what's before you, I can't help that God didn't give you enough gift to process the information." That escalated into a heated discussion in the public works building lobby at a break during the meeting. Police investigated and did not pursue charges. Brown said he is now investigating the matter. "This is in no way about the police investigation," **Rooney** said.

On Wednesday, after an executive session at its village board meeting the prior night, trustees issued an online statement that communicated to **Rooney** "its expectation that all village employees, especially those in leadership positions, conduct the village's business in a way that is professional and respectful of others at all times." Beyond that, the board took no action on the matter. Garcia was disappointed the board apparently took no disciplinary action. "As a public official, he should not behave like that," Garcia said.

## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

Courier News (IL) April 1, 2015

Carpentersville Meeting Gets Heated; No Charges Police Investigate After Trustee Candidate and Village Manager Trade Insults Author: Mike Danahey

Insults about intelligence and bitter debate between the Carpentersville village manager and a village trustee candidate spilled over into an angry confrontation outside a meeting room, leading to a police investigation but no charges, officials said this week. Carpentersville trustee candidate Humberto Garcia filed a police report regarding Village Manager **Mark Rooney's** actions during and outside a Finance and Audit Commission meeting March 14 at the town's public works building. Garcia has been serving on the commission for about four years.

Responding to a Freedom of Information Act request from The Courier-News, Carpentersville released a video, police reports and the results of a police investigation about the incident with a memo that states: "Based on interviews and review of the evidence, there is no basis for pursuing criminal charges against any of the individuals involved." Still, Carpentersville Village President Ed Ritter said that the matter would be discussed in executive session following the Village Board meeting Tuesday night and that an official statement would be posted on the village's website after that discussion.

What led to the heated discussion and the ensuing report and investigation was a comment **Rooney** made to Garcia during the March 14 meeting. On an audio of that meeting obtained through the FOIA request, more than 20 minutes into a discussion of the fire department's proposed budget, **Rooney** calls into question claims some people in town and some firefighters have been making that the fire department is understaffed.

Garcia responded that he had heard those claims and that the department is understaffed. He asked **Rooney** if those people are lying. **Rooney** asserted that they are lying, noted that Garcia has been on the commission for several years and that the numbers are there before him. **Rooney** commented, "If you can't figure it out, I can draw you a picture. But if you can't understand what's before you, I can't help that God didn't give you enough gift to process the information."

According to Garcia, the matter escalated at a break several hours into the session, prior to him leaving to participate in the East Dundee St. Patrick's Day parade. The report released Monday notes a surveillance video from the lobby that caught the incident. The video, with no audio, shows Garcia using a finger to emphasize a point and **Rooney** immediately stepping into Garcia and using the same gesture, the report states. "Humberto did not appear to be threatening at that point, and **Mark Rooney** appeared to be the aggressor by stepping into Humberto," the report states. Then, "as Humberto was walking away **Mark** suddenly turns and approaches Humberto again at a fast pace and **Mark** is again using his finger in a poking motion to emphasize his point," the report states. Garcia exited the front door but then comes back into the lobby, the report states. Garcia looked toward the meeting room, then **Rooney** walked toward Garcia, the

# Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

report states. Garcia does appear threatened at this point, the report states, "as he slowly edges toward **Mark** with (redacted name) in between them. As (name redacted) grabbed **Mark**, it appears he is trying to shepherd him away from Humberto." "It appears that **Mark's** body is leaning in towards the meeting room and not towards Humberto, and **Mark** appears to look directly at (redacted name) and **Mark** says something to (redacted name) who immediately releases **Mark** and lets him pass." The report states, it "doesn't appear that **Mark** is trying to physically harm or threaten Humberto. It appears to be a disagreement that became personal, not criminal. Although there were many things said that could be considered insulting and unprofessional, it does not appear that any of these things would rise to the level of criminal conduct in that no physical threats were muttered."

According to the reports, **Rooney** told police that Garcia stopped him in the lobby and asked for an apology for what **Rooney** said during the meeting. **Rooney** said he would not apologize, the report states. **Rooney** told police Garcia threatened to have **Rooney** fired if Garcia got elected as a trustee. **Rooney** also claimed Garcia made a comment about "beating an apology out of him." **Rooney** said he "told Garcia he was a son of a bitch if he thought he could use violence against him." **Rooney** also advised police that during the argument, "he did make a comment to Humberto about beating his wife."

Tuesday, Garcia said he would wait until after the Village Board meeting to make any further comment. **Rooney** could not be reached for comment Tuesday afternoon. As for **Rooney's** comment about Garcia and a domestic offense, according to a redacted police report, officers were called to the Garcia home on Oct. 13, 2013, about a physical altercation. Media outlets learned about the incident last week from a tipster. Garcia was taken into custody and charged with domestic battery, according to the report. Garcia and his wife, Bibiana, said that the Monday after the incident she and her daughter asked to have the charges dropped and thought they had been, but soon learned they had not.

According to online court records, on Jan. 30, 2014, Garcia pleaded guilty and paid fines and fees totaling \$820. He completed counseling, and the plea was vacated Nov. 20, 2014. The Garcias said Friday that they didn't want to bring up the matter because of their children and the attention it might receive. "It was embarrassing," Garcia said. Garcia has lived in Carpentersville for 20 years and owns and operates Meadowdale Performance Garage, He said he intends to remain in the race for one of the three spots on the village board up this April.

One of the other trustee candidates, incumbent Paul Humpfer was sentenced to a year of probation in October 2008 and ordered to enroll in a 26-week domestic violence program because of an incident with his wife in May 2007. Humpfer paid \$1,000 in fines and costs and was ordered to refrain from abusive contact with his now-ex-wife. After complying with the conditions, the case was discharged in October 2009. Other Village Board candidates are incumbent Don Burroway along with Sara Miller, Jeff Sabbe and Chris Scholl.

# Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

Daily Herald (IL) July 10, 2014

#### **Investigation Clears Carpentersville Official**

Author: Madhu Krishnamurthy

An independent investigator looking into allegations of gender discrimination, retaliation and harassment made by a former Carpentersville village employee against Village Manager J.

Mark Rooney determined there was no validity to the claims. The allegations were made by the village's former human resources director, Linda Mogren, who resigned in May under a separation agreement with the village. At the time, neither village officials nor Rooney would discuss the reasons that led to Mogren's departure. Mogren, a village employee since 1998, served as human resources director for nine years. Several attempts to reach her and her attorney were unsuccessful. Mogren refused to cooperate with the investigation citing her severance agreement with the village in which both parties agreed to refrain from disparaging statements. Mogren was assured she would have immunity for any comments made during the investigation, according to independent investigator Dennis Walsh with the legal firm Klein, Thorpe and Jenkins.

The firm previously served as the village's attorney and was chosen to do the investigation because of Walsh's reputation, Village President Ed Ritter said. Walsh interviewed **Rooney** and several other village employees who either witnessed interactions between **Rooney** and Mogren or could speak to the allegations, and reviewed numerous documents of communication between Mogren and **Rooney**, according to documents obtained by the Daily Herald through a public records request.

Among Mogren's allegations were that **Rooney** "had a pattern of replacing women senior staff over 40 years old with males" and that he was trying to force her out after 15 years of service. She also claimed **Rooney** made several threats to physically harm village employees. According to the investigator's report several employees interviewed said **Rooney** would make references to his military service, but never expressly threatened to harm any employees. The police chief also looked into that allegation and determined it was unfounded. The investigation determined **Rooney**, formerly village manager in Wheeling, didn't break any state or federal laws or violate village policy, and acknowledged he is a demanding manager.

Ritter said the report puts an end to the matter. "I have a lot of confidence in our manager, the way he operates and how careful he is in anything that he does involving personnel," Ritter said. Ritter's only comment about Mogren was that she was "an excellent employee." "She chose to leave, and she was not forced to leave. She was a good employee while she was here," he said. Ritter said the village hired the independent investigator only to avoid potential litigation. "We're being proactive," he said. "We did not have to investigate. We could have just left it. But I didn't want to do that because sometimes when you just leave something, it seems like you are afraid to investigate."

## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

Daily Herald (IL) March 22, 2014

#### Village Postpones Laying Off Firefighters

Author: Lenore T. Adkins

Carpentersville has delayed the planned layoffs of two full-time firefighters while union officials discuss cuts they can make to save those jobs, Village Manager **J. Mark Rooney** said Friday. "I'm very optimistic that the firefighter's union will help us find a solution to avoid the layoffs," **Rooney** said. This action comes after the union met with **Rooney** on Wednesday to discuss the pending layoffs of the firefighters who were originally going to be let go March 28. There are 32 full-time firefighters, and the two at risk of losing their jobs have the least seniority.

Rather than work with a specific dollar amount, the union will instead make cuts from its recent contract and present the proposed savings to **Rooney**. The village board has final say and will vote on the new fiscal year budget April 1.

The extension gives the union time to consider what cutbacks it can take. Three years ago, during contract negotiations, the union agreed to several concessions so the village would not lay off three firefighters. The concessions included reduced holiday pay, no salary increase during the first year of the contract and a reduction in overtime pay. The union last fall agreed to another employment deal, which is what's being reviewed. "We are actively discussing our options with our members," said Lt. Rick Nieves, president of International Association of Fire Fighters Local 4790. "We are happy to see the village extend the timeline."

Last month, **Rooney** announced staff cuts of the two firefighters and three other village employees to help plug a projected \$429,000 deficit. **Rooney** said similar negotiations are also afoot with the union that represents the other three employees. Since the announcement of the layoffs, the firefighter's union has filed a grievance. Also, several firefighters and retired chief John Schuldt have attended various board and budget meetings.

In the aftermath, firefighter Chris Scholl, a Carpentersville resident, publicly questioned whether the village is really in a financial bind and created an online petition to oust **Rooney** over what he calls his "poor management of village affairs."

As of Friday afternoon, 114 people had signed the petition. Scholl said most of them have family members working in the village or are firefighters elsewhere. He said 14 people are from out of state and others are from outside the area, according to information Scholl released to the Daily Herald. **Rooney** said he is aware of the petition and is ignoring it. "It does me no good to study every blog that is ever out there about me," **Rooney** said. "I just never made it a practice to read blogs. And I'm not going to start now."

## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

Daily Herald (IL) January 9, 2014

#### **Carpentersville Approves Settlement with Firefighters**

Author: Lenore T. Adkins

Carpentersville officials approved a contract settlement with the village's full-time firefighters Wednesday — a move that puts to rest the issues between the two parties and gives residents the protection they need without breaking the bank, officials said. In doing so, both parties also avoided settling their disputes through an often lengthy and costly arbitration proceeding. "That would have been the next step had we not come to a resolution," union President Lt. Rick Nieves said. The settlement stipulates that the village use a daily minimum of eight full-time firefighters spread among the three stations; the village previously staffed them according to daily demands.

In exchange, village officials can also use as many part-time firefighters as needed. Other highlights in the settlement include a round-the-clock lieutenant at every station, and the elimination of the village's right to remove fire engines from service when an unusual number of firefighters are absent. In turn, the union agreed to drop the six grievances it filed against the village related to staffing and seniority issues. "We're moving in the right direction; obviously we've got this compromise, and we think it's good for both sides," said Nieves, who could not stop smiling after the vote. "We're looking towards the future." The settlement, meanwhile, is expected to cost the village less than \$50,000 in overtime, Village Manager **J. Mark Rooney** said.

Wednesday's board action came nearly three months after the village and the union agreed to a three-year contract for the 32 full-time firefighters. But several weeks later, the union complained the staffing changes would lead to slower response times that would endanger residents. Village officials, however, said the community was never in jeopardy, and the union actually was upset over the anticipated loss of overtime. The contract, they said, was meant to help curb \$300,000 in overtime expenses. In the ensuing months, the full-time firefighters launched a social media campaign against the new pact, met with a pair of neighborhood groups and with Tom Roeser, an influential businessman and philanthropist. Also in the aftermath, resident Chris Scholl, a full-time Carpentersville firefighter, started a that was critical of the board and of **Rooney**.

At the end of November, the board authorized **Rooney** to request a meeting with the union to resolve the impasse. The interest was in a workforce concentrated on the business at hand, rather than problems on the periphery. "This is an example where compromise should not be a dirty word," **Rooney** said. Wednesday's vote was unanimous, with trustees Paul Humpfer and Pat Schultz absent from the meeting. Village President Ed Ritter heralds the process as a win for everyone and thanks everyone for their willingness to compromise. "We've put some of the biggest disagreements behind us, and we're moving forward cooperatively," Ritter said.

## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

Daily Herald (IL) September 19, 2013

#### Village Working to Resolve Driveway Issue

Author: Lenore T. Adkins

Business owner Tom Roeser continues to feud with the village of Carpentersville over the brick driveway he installed that violates village code. While brick pavers are a no-no for driveways, they are allowed for patio construction, Village Manager **J. Mark Rooney** said. So if Roeser treats the driveway like a patio, it will comply with village code, **Rooney** said. "I'm not going to make a mountain out of a molehill," **Rooney** said. "If it's not looking like a driveway and it's not acting like a driveway, it's time to move on."

But Roeser, owner of, the village's largest employer, doesn't want a patio; he wants a driveway. And he says he intends to use that property as a driveway instead of playing a game of semantics with the village. "These guys are trying to make a problem go away that they created by calling a duck a swan," Roeser said. "This is not a small issue, and it's not about a driveway. It's about management that is so bad and inconsistent, they make me laugh."

The driveway lies between and the Order of Odd Fellows Lodge. Roeser owns the building that houses Sign-A-Rama. He says he built the grass-friendly driveway to blend in with the nearby residential area. The village rejected his original application for a brick driveway, and the community development department fined his contractor \$150 for building it without a permit.

Roeser caused a stir last month when he complained to the village board about the miscommunication and misinformation he said he received from the community development department on several matters, including the controversial driveway at 3 N. Washington St. He told the board to get more involved in day-to-day operations but stopped short of asking trustees to fire Community Development Director Jim Hock.

In response to complaints from Roeser and others, **Rooney** ordered Hock and several members from that department to attend in-house educational seminars on customer service. Villagewide training on communication and customer service will take place later this month, **Rooney** said. Within the next six to 12 months, trustees could also consider changing the code when they address gravel driveways in the village, **Rooney** said. That, he added, has nothing to do with Roeser's complaint. "It was something that was under consideration for the last year," **Rooney** said. "We don't write laws for one person.

## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

Daily Herald (Arlington Heights, IL) February 8, 2013

#### 1 town suing another over Walmart

Author: Lenore T. Adkins

Although a Kane County judge recently refused to issue a temporary restraining order that would have blocked Walmart from getting money through a special taxing district in Carpentersville, East Dundee will proceed with additional legal action. East Dundee's lawsuit seeks to prevent the retailer from getting any financial incentives from Carpentersville's tax increment finance district. A hearing is scheduled Feb. 14. Walmart plans to close its store in East Dundee and open a Supercenter by 2015 in Carpentersville.

"What the village filed was just asking the judge to make sure that the law is followed as it relates to the TIF and the expenditure of TIF funds," East Dundee Village President Jerald Bartels said. "I would think that Carpentersville would want to make sure all the laws are upheld as well." Carpentersville Village Manager J. Mark Rooney says the village knows the law. "The law is very specific on what is allowed and what isn't and we will follow the letter of the law and the spirit of the law," Rooney said.

Last year, Walmart said it would close the store in East Dundee to build a larger store at Lake Marian Road and Besinger Drive. Walmart officials did not specify why the Carpentersville location is more attractive. If the project reaches fruition, East Dundee will lose about \$850,000 in annual revenue. The Carpentersville land lies within a TIF district the board created last year to spur development. In a TIF district, property tax levels are frozen for a period of up to 23 years. As redevelopment occurs and the land appreciates, taxes from the increased value are used to pay for improvements or to help defray development costs. East Dundee is pointing to a part of the law that says a business would not qualify for TIF funding if it moves to another TIF district less than 10 miles away in another town. The proposed Walmart would be less than three miles from the East Dundee site, also in a TIF district.

Carpentersville officials accuse East Dundee of stalling the development, of acting prematurely and of wasting their time and money. While Carpentersville is anticipating a TIF request from Walmart, it has not yet happened, said Joe Wade, Carpentersville's assistant village manager in charge of economic development. Wade pointed to a second part of the law that says TIF dollars can be spent in the new location if the old location "contained inadequate space, had become economically obsolete or was no longer a viable location for the retailer or serviceman." "My reaction (to the lawsuit) was why aren't they quoting the full portion of the statute?" Wade asked. Bartels said he would rather wait to see what happens in court. "We'll see what the judge says. (Carpentersville) can make that argument in front of the judge," Bartels said. "Both sides will be heard in court and we'll see where it goes."

# **Section 8**

## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

Courier News (IL) February 1, 2013

#### Report Says C'ville Fire Chief Put on Administrative Leave

Author: Mike Danahey

Village Fire Chief John Schuldt has been put on administrative leave, according to a Chicago radio report. WBBM News Radio reported Thursday morning that Schuldt had been put on leave and that Village Manager **Mark Rooney** would not comment as to why the move had been made. Village President Ed Ritter told The Courier-News Thursday morning that he had received several calls about the report but he could neither confirm nor deny it. He referred calls to **Rooney's** office. **Rooney** was not available for comment, and his office also would neither confirm nor deny the reports. Schuldt was not in his office Thursday morning and could not immediately be reached for comment.

The Illinois Fire Chiefs Association named Schuldt, 52, the Illinois Fire Chief of the Year for 2011 from among departments with a population of more than 25,000. Schuldt was nominated for the award by Assistant Fire Chief John Skillman. At the time, Skillman told The Courier-News that Schuldt had been with the department for 34 years, including 31 in a full-time role. Schuldt was named chief in 1996 and has served with fire safety organizations on the state and even the national level, Skillman said. Skillman noted in his nomination that "in May 2001, Chief Schuldt was asked by his village board to serve as acting village manager. He faced several key village staff positions that were vacant and the need to develop a village budget, at the time \$40 million. He was responsible for a staff of 300 people during his 12 months as acting manager until his return to fire chief in May 2002. He was asked to stay in the position, but his love for the fire service returned him to his chief's position."

In the community, Skillman noted, Schuldt was on the founding board of the local Boys & Girls Club in the 1990s. Schuldt served on a 2010 committee that brought the Healing Field to Carpentersville to honor war heroes. Since 1998, he has participated in a community-wide paint-a-thon in which volunteers' paint homes of those unable to do so. He helped coordinate area fire departments' sending of help to victims of the 2004 Utica tornado and Hurricane Katrina in 2005. In 2010, when a local family was left homeless by a fire, Schuldt worked first to solicit donations of furniture and clothing the family needed and then worked with the owner of a storage facility to create a permanent cache of such items for future fire victims. Schuldt helped bring "Remembering When," a fire- and fall-prevention program for older adults, to Carpentersville as a pilot project and was instrumental in setting up a division technical rescue team for the area.

## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

The Northwest Herald (IL) August 28, 2012

#### Lawsuit Claims Brutality, Racism in Carpentersville

Author: Lawerence Synett

A Crystal Lake man has filed a civil lawsuit against the village of Carpentersville and its police department, claiming that he was battered and racially mistreated during a traffic stop last year. Johny Perez, 21, is seeking more than \$50,000 in damages in relation to an incident more than a year ago when Officer Alan Webb arrested him for misdemeanor resisting a peace officer and aggravated battery, according to the lawsuit filed in Kane County earlier this month. The 12-count lawsuit against the city and its police officers alleges that Perez was physically and verbally abused during a traffic stop March 16, 2011, on Route 25.

It also states that the village's nonbinding resolution to make English its official language gives police a license to discriminate against Spanish-speaking people. Perez was pulled over that day by a member of the Carpentersville Police Department for driving 5 mph over the posted speed limit, the lawsuit states. He then was asked to step out of the vehicle to read the speed limit sign and return to the car before Webb and several other officers arrived. According to the lawsuit, Perez again was asked to exit his vehicle by Webb and was shoved in the chest. Webb punched him twice in the face, kneed him and struck him in the back of the head. Other officers held Perez while the abuse occurred, his lawsuit states. The officers also shouted racial slurs and verbally threatened Perez, a U.S. citizen who speaks Spanish and English, the lawsuit states. He suffered bruising on his face and body.

The charges later were dismissed, court records show. Perez was treated for bruises to his face and body at Centegra Hospital – McHenry, which cost \$3,000 in medical bills, according to the lawsuit. Carpentersville Village Board members approved making English the official language in June 2007. At the time, proponents said it would strengthen the village and save taxpayers' money. Others argued that it would make the village a more difficult place to do business. Latinos make up more than 44 percent of the village population, according to 2010 Census data. The lawsuit alleges that resolution "was the product of pervasive racism of the village government, and some village residents against individuals of Mexican descent." "Police officers were permitted and emboldened by the village's institutional racism to use force against individuals of Mexican descent at a frequency disproportionate to their use of force against other individuals," the lawsuit states.

The counts include civil-rights violations, false arrest and imprisonment, physical abuse, unlawful search and deprivation of liberty, excessive force, civil conspiracy, and assault and battery, among others. The lawsuit also accuses Webb of lying in the subsequent police report by making it out as though Perez was the aggressor. That includes Perez yelling and bumping Webb, as well as refusing to be handcuffed. Carpentersville Village Manager **Mark Rooney** said the village had not been served the lawsuit as of Tuesday afternoon, and could not comment on any litigation.

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# **Section 8**

## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

Daily Herald (Arlington Heights, IL) January 3, 2012

#### Carpentersville lays off two department heads

Author: Lenore T. Adkins

This marks the final week for a pair of Carpentersville department heads. Officials have laid off Engineer Scott Marquardt and Economic Development Director/Special Projects Coordinator Janice Murphy, both of whom have worked with the village for about a half dozen years. Details of their severance agreements were not available Monday.

Also this week, the village board will consider whether to furnish Village Manager J. Mark Rooney with a small raise and additional perks. The village made the decision to eliminate Marquardt and Murphy this fall, citing rising fuel and health insurance costs and the pay increases for the four unions that negotiated small raises last year, Village President Ed Ritter said. In the end, officials decided they could merge Murphy's responsibilities with another department and realized there wouldn't be enough projects to justify Marquardt's continued employment. "It's very hard," Ritter said. "We had to think long and hard about it because they were good employees and they did some important things for the village. But in today's reality, you have to cover your expenses and you have to make sure you can cover them." Assistant Village Manager Steven Jones will absorb Murphy's duties, while the rest of the engineering staff will take on Marquardt's work and hire outside contractors as needed. Eliminating the two jobs saves a combined \$229,779, according to Finance Director Lisa Happ.

Meanwhile, **Rooney** is up for a raise and additional perks — his reward for a job well done, officials said. Tonight the village board will vote on whether to increase **Rooney**'s salary from \$130,000 to \$132,600, his monthly vehicle stipend from \$300 to \$500 and whether to cover his life insurance policy. The adjustments would be effective in August.

**Rooney** has been village manager since September 2010, and the board completed his review and evaluation late last month. Ritter gave **Rooney** high marks for his leadership skills, for improving customer service at every level and for streamlining village operations. "He's done a really good job of reorganizing village hall and working at a lot of cost-saving things, and we've been very happy with his service so far," Ritter said. "There were some things he originally asked for (when he was hired) and we said we can't do it, but if things went well, when next year came around, we'd add a couple of things to his contract."

Trustee Kay Teeter said **Rooney** took on a difficult job, and without the cuts and other cost-savings measures he instituted residents probably would be facing higher property taxes. "We're not giving him everything that he could be asking for, but we are basically rewarding him," Teeter said. "He was given a tough job when he came in, and he has really stepped up to the plate." **Rooney**, a member of the U.S. Army Reserves, could not be reached for comment due to a training obligation with the organization.

# **Section 8**

## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

Daily Herald (IL) November 7, 2011

#### **Carpentersville Wins Award for Labor Negotiations**

Author: Lenore T. Adkins

The Illinois Public Employer Labor Relations Association has recognized Carpentersville for its four contract negotiations in 2011 that saved hundreds of thousands of dollars, avoided layoffs and kept public services intact. The village received the Rosemont-based association's James Baird Leadership Award, which notes "leadership and achievement" in Illinois public sector labor relations. "The IPELRA board has determined that Carpentersville's labor relations efforts ... are positive contributions to the Illinois public sector labor relations field," Awards Committee chairwoman Mary Rath wrote in her congratulatory letter to the village.

The village this year negotiated four, three-year contracts with unions representing firefighters, police officers, police sergeants and public works employees. But it was the talks with the fire department that set the tone for how the other three sessions went, Village Manager **J. Mark Rooney** said. The firefighters' union accepted smaller pay increases and other concessions that saved the village \$192,640, and agreed to hold contract negotiations without an attorney. "It gave some level of trust and probably assurance that policemen could do the same," **Rooney** said, adding that the village also kept attorneys out of the mix until the very end. "(Attorneys) didn't come to the table; that was just kind of an email and a conference call situation."

Rick Nieves, president of the firefighters' union, said the union also kept the taxpayers and their struggles in mind during the negotiations. "It's not just about us; it's about the public," Nieves said. "What we do is public service. It's tough now; everybody's struggling economically." In the end, after the firefighter's contract was ratified, the other unions agreed to smaller raises and other cutbacks. Last year, the village's dire financial situation resulted in the layoffs of five public works employees, two employees from the community development department and a part-time information technology worker, said Linda Mogren, director of the human resources. She also is the liaison between the union representatives and the village. "When we learned what the economic picture was, we worked hard to work with the unions and we felt that we both came to the table with some good compromises, so we felt very good about the results," Mogren said. Carpentersville officials are in the middle of negotiating contracts with unions representing part-time firefighters and civilian employees that include building inspectors, clerks and code enforcement officers. They hope those go as smoothly as the others. James Powers, the village's labor attorney, nominated Carpentersville for the award and Carpentersville Fire Chief John Schuldt accepted the award. He presented it to the village board last week. It marks the first time Carpentersville has received the recognition. "I think it shows the effort that was put in by the village and the unions," Schuldt said. "The village coming together and negotiating four successful contracts that reduced overall expenses, without laying anybody off in those units, I think that was remarkable."

# Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

Courier News (IL) October 30, 2011

#### Injured Cop Sues C'ville for Health Insurance Coverage

Author: Mike Danahey

Former village police Officer Joseph Cecala is suing the village, Village Manager Mark Rooney and village human resources Director Linda Mogren for health insurance benefits for himself and his family he feels are owed him under Illinois law. Cecala, 40, was injured Dec. 29, 2008, while on duty at the scene of an accident at Route 31 and Spruce Road. According to the lawsuit, a driver had knocked down a tree that led to a traffic signal falling onto Route 31. Believing the situation to be an emergency and that, due to the hour, no help would come for several hours to remove the signal, Cecala and another officer moved the item off the road. In the process, Cecala injured his back in what the lawsuit calls a "catastrophic injury." In November 2010, Cecala, the married father of two children, was awarded an in-the-line-of-duty disability pension by the village's police pension board that went into effect that December. That month, he applied to the village for health insurance benefits he felt were his under the state's Public Safety Employee Benefits Act (PSEBA).

The act states if a police officer suffers a catastrophic injury or is killed in the line of duty, his employer shall pay the entire premium of the employer's health insurance plan for the injured employee, the injured employee's spouse, and for each dependent child of the injured employee until the child reaches the age of majority or until the end of the calendar year in which the child reaches the age of 25 if the child continues to be a dependent. To be covered under the act, the injury or death must have resulted from the officer's response to fresh pursuit or is reasonably believed to be an emergency, an unlawful act by another, or during the investigation of a crime. The lawsuit includes a copy of a Dec. 9, 2010, letter from Mogren to Cecala's attorney, Ryan Theriault, stating that Cecala does not qualify for benefits under PSEBA. "In particular, his injury did not occur as a result of any of the circumstances enumerated in (the act). Consequently, Officer Cecala's application for receipt of benefits is denied. Officer Cecala is eligible for insurance coverage as a retiree under the Illinois Insurance Code provisions relating to police officers. If Officer Cecala elects and pays the total cost of such coverage, the benefits will be available as of January 1, 2011," the letter states.

Theriault is an attorney at Foote, Meyers, Mielke and Flowers in St. Charles. He said that Cecala currently is covered under the policy his wife has at her job. The suit seeks reimbursement for \$212 per month since December 2010 for those premiums. "This lawsuit has been filed to force the village to uphold its legal obligation to provide health insurance to police officers who are catastrophically injured in the line of duty," Theriault said Friday. The village, he said, "has intentionally chosen to turn its back on an officer and his family who sustained career-ending injuries as the result of his dedicated service to the village and the people of Carpentersville." **Rooney** was out of the office Friday and could not be reached for comment.

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## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

Daily Herald (IL) November 11, 2010

#### **Carpentersville Officials Weighing Higher Levy**

Author: Tara García Mathewson

What looks like bad news for taxpayers is, at the same time, a village trying to keep its income steady — or at least, stem its losses. At Carpentersville's Audit and Finance committee meeting Wednesday night, the village manager and finance director presented recommendations for next year's levy. Last year, the village asked for — and received — about \$10.2 million in the levy. This year, the board must decide if it wants to ask for the same amount and end up with \$1.1 million less in the budget because of decreasing assessed values, or ask for a little more.

The village manager, **Mark Rooney**, is suggesting the board request almost \$10.9 million to keep the budget losses at just more than \$400,000. Both options will mean a tax rate increase for residents. "Are we going to reduce revenues or increase taxes? I have a feeling we're going to have to raise our tax rates, but we're not going to raise any more money," said Ed Ritter, Carpentersville village president. **Rooney's** recommendation would mean a 15 percent increase in the tax rate over last year, though that will likely not increase individual taxpayers' bills by much.

The Audit and Finance committee did not make a formal recommendation to the board, but Paul Lanspa and David High, the only two members who would not be voting on the levy as trustees, both endorsed **Rooney's** recommendation. "I don't want to pay any more, but it's not egregious," Lanspa conceded.

The board will decide on the levy at its Dec. 7 meeting where the public can comment. To access the PowerPoint presentation with information about the village's revenues and the various levy options to be discussed by the board, residents can go to the village website at vil.carpentersville.il.us. On the home page, there is a link called "Village Board Presentation: 2011/2012 Budget."

# **Section 8**

## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

Courier News (IL) September 2, 2010

#### Former Wheeling Manager is Hired by Carpentersville

Author: Jacob Hurwith

After extensive interviews and lengthy debate over which of 48 candidates would fit the position of village manager, trustees decided to go with the one they say has the most experience and professionalism. **Mark Rooney**, a former village manager in Wheeling, was chosen for the job Tuesday night. He will start on Sept. 21. **Rooney** served as Wheeling village manager from 2006 to 2009 and was the assistant manager for three years before that.

While in Wheeling, which has a population of about 40,300, he helped implement two new tax increment financing districts and extended a third TIF district, something familiar to the village of Carpentersville. **Rooney** also helped maintain Wheeling's AA+ Fitch Investor Services and S&P AA bond rating in addition to helping raise \$40 million in bond debt to construct new municipal facilities.

Carpentersville officials said that experience will come in handy as the village begins to build a new public works facility. **Rooney** is a lieutenant colonel in the U.S. Army Reserves and was a senior adviser for the Army's Military Transition Team, where he trained and mentored two separate Iraqi regiments composed of 900 Iraqi soldiers. **Rooney**, 50, will be paid an annual salary of \$130,000. He said he is looking forward to getting to know village staff. "I'm excited to do more listening than talking," **Rooney** said. "I want to learn the specifics and the intricacies of how Carpentersville functions. The formal structure is important, but the informal structure is just as important."

**Rooney** hold a master's degree in public administration from Northern Illinois University. He enlisted in the Army immediately after earning his degree and served in Saudi Arabia, Iraq and Kuwait. He later went to work as a staff assistant for the now-late U.S. Sen. Paul Simon, helping facilitate the passage of legislation that resulted in the redevelopment of Joliet Arsenal, Fort Sheridan and Glenview Naval Air Station. Simon "taught me the greatest lesson," **Rooney** said. "Disagree without being disagreeable is the quality you have to have to be in public service."

**Rooney** will take over from Assistant Village Manager Dawn Wucki-Rossbach, whom the board praised for her work since the retirement of former manager Craig Anderson earlier this year. "We made a great choice, and I am happy for the residents of Carpentersville," Trustee Brad McFeggan said. "He will lead us in the right direction and the direction we need."

# **Section 8**

## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

Daily Herald (IL) September 24, 2009

#### Village Leader is Out

Author: Madhu Krishnamurthy

Wheeling Village Manager **J. Mark Rooney** has resigned his post as of Wednesday, Village President Judy Abruscato confirmed Wednesday night. Two trustees say **Rooney's** departure was imminent after a majority of the board indicated in closed session Monday that they no longer supported him. Abruscato did not confirm that but would not offer an explanation for his departure. She said the village board is grateful to **Rooney** because under his leadership a new village hall, fire station and public works facility were built, and the staff and board successfully negotiated police and fire union contracts. "The village board wishes **Mark** the best in his career," Abruscato said. "There are no problems with **Mr. Rooney**."

Assistant Village Manager Jon Sfondilis has been designated acting village manager, and he will remain in that post for the foreseeable future, said Martin Seay, administrative assistant. **Rooney** declined to comment Wednesday, directing all questions to Abruscato. He joined Wheeling in 2003 as assistant village manager and was named acting village manager in December 2006 when then-manager Wally Douthwaite resigned. **Rooney** was named manager in February 2007. Before Wheeling, he was city administrator in Highwood.

Trustees Pat Horcher and Dean Argiris said that in a poll taken Monday night among the six trustees and Abruscato, **Rooney** had lost the support of five of them. Neither Argiris nor Horcher would fully explain what caused **Rooney's** loss of favor. They said Horcher and Robert Heer supported **Rooney** staying, while Argiris, Abruscato, Ken Brady, Dave Vogel and Ray Lang did not. "Most of what happened in my mind was politics and clash of personalities, really," Horcher said.

Horcher said some trustees complained **Rooney** did not keep them fully informed about village business. "They were basically not liking the way he was managing the village," Horcher said. Argiris, meanwhile, disagreed **Rooney's** departure was political. "It wasn't about personality conflicts and it wasn't about politics," Argiris said. "There were issues. This was a business decision by a majority of the board."

Argiris said the problems have been going on for more than a year, but he would not divulge the actual reasons why **Rooney** was leaving. He said it was not because of any illegal actions or financial mismanagement. "I believe it was hurting the village keeping him on and that's why we need to move on," Argiris said. "His style ... the way he would do business, eventually it would hurt the village, if it hadn't already. And these were issues that never seemed to be going away. They needed to be addressed." Argiris said he has a high opinion of **Rooney** and was an advocate of hiring him at first, but he said **Rooney** was "jeopardizing things." Horcher, meanwhile, believes **Rooney** has been one of Wheeling's best managers. "Look at what got done under this guy," he said. "We built the public works building and the village hall. We finally

# **Section 8**

## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

finished the space study for the village. He managed two police and fire contract negotiations without going into arbitration. "The guy did a really good job. He was dedicated to this village." A lieutenant colonel with the U.S. Army Reserve, **Rooney** served 18 months in Iraq while he was Wheeling's assistant village manager. **Rooney's** \$140,000 salary for this year was frozen last November in a joint decision he made with the village board. The terms of his departure are still being worked out, Seay said.

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# **Section 8**

# Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

Wheeling Countryside (IL) February 28, 2008

#### **Rooney Gets 12 Percent Raise**

Author: Kit Kadlec

A year after he was hired to be village manager, **Mark Rooney** was given a \$15,000 raise last week. Previously making \$125,000, he will now receive an annual salary of \$140,000, or 12 percent more, under a resolution signed and put into effect Feb. 19. **Rooney** was hired as village manager on Feb. 26 last year, after first serving as the village's acting manager. In becoming manager, he replaced Wallace Douthwaite, who resigned in December 2006.

In unanimously approving the raise, which was tied to a performance review, no trustees made a comment during the Village Board meeting. Reached after the meeting, Acting Village President Patrick Horcher said he and others had been pleased with how **Rooney** has done in his first year. "I think everybody is pretty happy," he said. "We've had a lot going on, and he's handled it well." **Rooney** is Wheeling's seventh village manager since it adopted the board/manager style of government in 1970. He first joined the village staff in 2003 as an assistant village manager. In 2005, as an Army reservist, **Rooney** was called into active duty and sent to Iraq. He trained soldiers for the new Iraqi army, then returned 15 months later.

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# **Section 8**

## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

Des Plaines Times (IL) December 13, 2007

#### Wheeling Manager Responds to Prospect Heights Criticism

Author: Charles Berman

Four days after the city of Prospect Heights and the village of Wheeling came together to appoint the new chairman of the Chicago Executive Airport, bad blood between the two municipalities continued to boil over. The hiring of former United Airlines pilot E. Allan Englehardt was supposed to signal a new era in leadership of the airport, formerly known as Palwaukee Municipal Airport.

Recent board meetings have focused on future airport business, not the alleged misconduct of former board Chairman Kevin Dohm and Vice Chairman L. James Wylie. Both leaders resigned within a one-month span earlier this year after concerns were raised regarding the payment of an airport contractor that was never approved by the board. On the surface, it appeared that the Airport Board moved on from those allegations, or at least kept its ongoing investigation and now apparent feud behind closed-session doors.

However, on Dec. 5, a letter attributed to five Prospect Heights aldermen was sent to Acting Wheeling President Judy Abruscato. The letter accuses Wheeling Village Manager **Mark Rooney** of sidestepping the board in an attempt to seek Federal Aviation Administration approval to build a Wheeling fire station on airport property. "It has come to our attention that since September, **Mr. Rooney** has ignored our collective understanding and pursued a course of conduct which mirrors the very conduct he complained about in the Fall," the Prospect Heights officials wrote.

The letter, which made it to the news media before Wheeling's Village Hall, also claims that **Rooney**, who sits on the Airport Board, threatened Airport Manager Dennis Rouleau's job for not obtaining the FAA's consent. "**Mr. Rooney's** conduct hurts airport morale and the important relationship of the City and the Village as partners in the ownership of the airport," the Prospect Heights officials wrote.

#### 'Nothing to hide'

**Rooney** adamantly denies all of Prospect Heights' charges. Before the Dec. 10 Wheeling Village Board meeting, he presented a litany of evidence, including e-mails, that he said proves he did not overstep his authority. "Prospect Heights is questioning my integrity," he said. "I have nothing to hide. "They are baseless and meaningless allegations. Now we'll have full disclosure of what's gone on (at the airport). You'll see I don't lie, cheat or steal and I don't tolerate those who do. "My job is to protect Wheeling's assets, including the airport."

Wheeling has been planning to build two new fire stations because the village's Police Department is taking over the entire building that police currently share with the Fire Department and Village Hall. To avoid the problems that the Alexander Graham Bell Montessori School

# Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

faced in trying to build a school in a runway zone, **Rooney** said he wanted to at least know if it was usable land before recommending any location. **Rooney** said he never received that answer, so there were never any real plans to build on that property.

### Abruscato surprised

The letter came as a surprise to Wheeling officials. Abruscato said the two municipalities met last week to discuss lingering issues and that the two sides left the sit-down on a positive note. Abruscato said she supports **Rooney** and does not believe he did anything inappropriate. "**Mr. Rooney** does a good job fulfilling the direction of the Wheeling board," she said. "That was poor judgment by Prospect Heights," she added. "They should have sent me the letter before going to the press. That makes for a bad relationship."

#### 'Positive' chairman

E. Allan Englehardt will officially take over the chairmanship of the Chicago Executive Airport Wednesday (Dec. 19) when he leads the board's next meeting. "I've been around this airport for a long time, and I want to do everything I can to see the airport get back on track," said Englehardt, who was appointed Dec. 1.

The 60-year-old former United Airlines pilot started as a flight instructor at Palwaukee 40 years ago. He retired as a Boeing 777 international captain on Feb. 1, but he still trains and certifies new pilots. Englehardt said it's not his place to comment on the tumultuous last few months at the airport, and he is focused on reaching the airport's full potential for all users. "I am a positive person and I see things continuing to spin that way," he said.

Rouleau spent last week showing Englehardt around the airport and brought him up to speed with ongoing airport business, good and bad. "He is very aware of the past," Rouleau said. "He is going to work to get everybody back on the same page. "I see us working past it. There are a lot of people who love this airport and when it comes down to it, people will roll up their sleeves and get back to business." Rouleau said Englehardt was an excellent choice. "He's very energetic, he understands the position and he will be a tremendous asset to the board of directors."

# Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

Wheeling Countryside (IL) March 8, 2007

#### Wheeling Drops 'Acting' from Rooney's Job Title

Author: Casey Moffitt

The Wheeling Village Board gave **Mark Rooney** 90 days as the village's acting manager as an audition to the permanent role. However, **Rooney** impressed trustees so quickly, they gave him the job nearly a month early. **Rooney** was officially hired as Wheeling's village manager during the board's Feb. 26 meeting. Trustees voted unanimously on the decision. "I just want to say, 'Thanks,' for the last two months," **Rooney** said after the vote. "I've had a great deal of satisfaction working with the staff and the board." **Rooney** replaces Wallace Douthwaite, who resigned in December. His contract was bought out at the end of that month. Since then, **Rooney** has been the acting village manager.

#### Local knowledge

Village President Greg Klatecki said **Rooney** is very knowledgeable about the issues in the village, and showed an aggressive edge while performing as acting village manager. "It makes the transition a lot easier," Klatecki said of the hire. "He is aware of most everything going on in the village." Klatecki said if the Village Board were to search for a new village manager, it could easily have taken six months, and then that person would have acclimated himself or herself to the issues in the village. As village officials are working on redevelopment projects, building a new village hall and two fire stations, along with other projects, Klatecki said a long transition is not in the best interest of the village. "We would end up in a lull waiting through the transition," he said. "Everything is falling into place and we don't want that momentum to stop."

### 'Personality fits'

Other trustees also praised **Rooney's** work over the past few months as acting village manager. "His personality fits the timing," Trustee Dean Argiris said. "It takes good leadership to get things done. I see the attitude changing at Village Hall. He comes with leadership." "We need to continue to work as a team," Trustee Bob Heer said. "This hiring makes us proud." **Rooney** first joined the village staff in 2003 as assistant village manager. As an Army reservist, **Rooney** was called into active duty in 2005. He was sent to Iraq where he trained soldiers for the new Iraqi army. He spent 15 months in active duty. "What a country," **Rooney** said. "I was gone for 15 months, and the Village Board still has the confidence in me to work for the village." **Rooney** was previously the city administrator for Highwood, where he worked for seven years. His tenure there was marked by the conversion of Fort Sheridan to civilian uses. **Rooney** becomes Wheeling's seventh village manager since the village adopted the board/manager style of government in 1970.

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## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

Daily Herald (IL) December 19, 2006

#### Wheeling Board Names Acting Village Manager

Author: Sue Ter Maat

The Wheeling village board Monday formally appointed an acting village manager to temporarily replace the current manager, who handed in his resignation last week. **J. Mark Rooney**, who was the assistant village manager, was designated as acting village manager, and he presided as such during the meeting.

The board also accepted the resignation of Wally Douthwaite, who was not present at the meeting. Last week, Douthwaite put in his resignation. He will remain with the village until the end of the year to tie up loose ends on projects he was working on, village officials said.

Douthwaite has declined to comment on his resignation. Some board members had hoped Douthwaite would've continued as village manager. Trustee Judy Abruscato said she was sad to see him go. "I thought he did a good job," she said.

Douthwaite was city manager of Des Plaines until 2001. He left the city to take a job as city manager in Springboro, Ohio. Douthwaite, 53, was hired as Wheeling's village manager in September 2002 after a seven-month search to fill the position. **Rooney** may become the village manager after a three-month trial. The board will decide to promote him or look for a new manager after that time. Before coming to Wheeling, **Rooney** was the city manager of Highwood.

## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

Glencoe News (IL) November 10, 2005

#### For Rooney in Iraq, Thoughts Will Turn to Veterans Day

Author: Kenneth L. R. Patchen

For Lt. Col. **Mark Rooney**, a former city administrator for Highwood who is now in Baghdad, Veterans Day offers a chance to consider anew the meaning of ceremonies intended to honor armed forces personnel. He has more time to think about remembrance these days. With a more normal schedule than he had in July when located near Tal Afar in northwestern Iraq, **Rooney** now is part of a group of 100 American soldiers working with 15,000 Iraqis. No longer assigned to improve water and sewage treatment plants, he is an adviser for Iraqi soldiers working in Taji to protect their country. Each day he is training and advising a regiment of 800 soldiers. "I think every day is getting better," he said.

**Rooney's** family lives at Town of Fort Sheridan. In March, 2003, he left Highwood to work as assistant village manager in Wheeling. A year later, he was called to serve in Iraq. While working in Highwood, he would take his children to participate in ceremonies sponsored by Highwood American Legion Post 501 to honor armed forces personnel. "You think about (Veterans Day) here more than you do there," **Rooney** said.

For many people, Veterans Day is a singular holiday of remembrance, he said, whereas in a war zone, it's more common to think of those who have died at any time of the day or year. In either case, both in a war zone or at home, a time of remembrance is not a time of enjoyment. "It's a traumatic event for those who have seen something," he said. On the home front, he said, "The families of deployed soldiers are unduly stressed."

Spouses live every day with the responsibility to maintain a household and to raise children. At any time, a military representative in dress greens may knock on the door with news that their life as they knew it is now over and the children have lost a parent. **Rooney** said this can create a tougher year for those left behind than for those who are deployed. Karen **Rooney**, taking care of their three children, agrees that explaining their life can be difficult. "It really is tough," she said. "It's hard to explain to (children)."

Veterans Day, she said, can be a time for people to remember those who are left at home while a spouse or child serves overseas. The focus can include those who were or are in the armed forces and their families. **Rooney** sees differences between the experience of World War II and Desert Storm veterans which is reflected in how they may view an occasion such as Veterans Day. World War II soldiers had cohesive units and a more common experience with one another and could share their experiences among themselves. That is not the pattern for today's soldier. **Rooney** has served in both Gulf War invasions and said the battlefield experience is different for a modern soldier. Military service is much more technological and specialized than it was I World War II. These days, some personnel do not see gunfire so that alone creates a difference among armed forces personnel in the same war. For example, his own experience in the past

# **Section 8**

## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

three months has exposed him to more gun fire than in previous assignments there. "(Service here is) violent, but not really as violent as portrayed in the media," he said. "The Gulf War was, in retrospect, a very easy operation. This one is much tougher. Operations (such as) fighting insurgents are never easy." He is comfortable serving in Iraq. "I'm not troubled by anything I've seen or done," he said. "The part that helps me is that I know what the mission is." He is helping Iraqi soldiers protect their country. He said many citizens there have a lot of motivation to make things better and adopt change. "The Iraqi soldiers are fighting and dying for their country here a lot more than the media portray," **Rooney** said. "It's good they're doing it. It's their country."

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## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

Daily Herald (IL) June 26, 2004

#### Wheeling Could Benefit Twice from Federal Flood-Control Plan

Author: Avian Carrasquillo

Wheeling's decision to take part in a federal flood mitigation program has economic implications for the town center, businesses and local homeowners, village officials say. The Army Corps of Engineers and the Illinois Department of Natural Resources are working with communities throughout the state on six projects meant to curb flooding in Illinois.

Wheeling holds a major stake in one of those projects, known as Levee 37, which calls for a Buffalo Creek reservoir expansion. The project calls for obtaining another 476 acre-feet (the amount of water required to cover 1 acre with 1 foot of water) of water storage at additional sites in Wheeling. Assistant Village Manager **Mark Rooney** said Wheeling's interest in this project is to protect existing businesses and houses from flooding. But he added Wheeling has a secondary goal of economic redevelopment of the downtown and Metra train station areas in mind with this project.

**Rooney** said development cannot occur in a heavy flood plain. Areas where homes and businesses exist in a flood plain were built before any study identified them as being in a flood plain, but it could affect future development there. "It's very expensive, if not impossible, to get permits to rebuild and build new things (in a flood plain) without this program," he said. "The federal project is a win-win situation as we see it in Wheeling," **Rooney** added.

Of the 33 sites being considered for water storage throughout the area, only two would be in Wheeling. One of the more visible sites is at the Wheeling Park District, 333 W. Dundee Road. where 205 acre-feet would be used. The other site identified is in the northwest corner of Wheeling on farm land. **Rooney** said the site would not be a detention pond, but would be designed to hold small amounts of water from the Des Plaines River when it overflowed until it subsided, and would not be enough to do any damage.

Jan Buchs, executive director of the Wheeling Park District said the park district will take a serious look at the federal plan. "We're excited to explore future opportunities to continue the future development of the park district," she said. The project would be federally funded and could be ready to break ground as early as fall 2005, **Rooney** estimated.

# **Section 8**

## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

Daily Herald (IL) October 23, 2003

#### Wheeling Sues to Acquire Property for Redevelopment

Author: Matt Arado

The village of Wheeling has filed a condemnation lawsuit against the owners of property on North Milwaukee Avenue in an effort to facilitate redevelopment of the area. The village is trying to acquire the property at 597 N. Milwaukee Ave., now home to a warehouse building and a used car dealership. The property owners could not be reached for comment. The property sits in a tax increment financing district the village established in February near the intersection of Milwaukee Avenue and Lake-Cook Road.

Wheeling officials would like to join the property with other parcels just to the north, forming a 20-acre site that could then be developed with shops and other commercial outlets. The village is negotiating purchase prices with the other property owners. "We believe commercial is the best use for that land," Assistant Village Manager **Mark Rooney** said. "A strong commercial area would be to the betterment of the entire community."

A TIF district is a redevelopment tool that allows towns to freeze property tax levels in a designated area for up to 23 years. As the value of the property rises, property owners in the district pay taxes as usual, but towns can use the amount paid above and beyond the frozen levels to cover redevelopment costs.

Wheeling now has three active TIF districts. In addition to the North Milwaukee-Lake-Cook Road area, there is a TIF district near the intersection of Dundee Road and Milwaukee Avenue and one further south on Milwaukee near Hintz Road. Next month, the village will hold a public hearing on a proposed fourth TIF district, which would be located around the Metra train tracks across Dundee Road. That hearing will be held Nov. 10. All of the redevelopment efforts are designed to give Wheeling a strong commercial tax base and improve the village's image.

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## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

Daily Herald (IL) March 3, 2003

#### **Village Works to Fill Out Staff in Top Spots**

Author: Cass Cliatt

A year ago, Wheeling trustees tried to steer the village toward improvement, but with a shortage of hands to work the helm. The vacancies in Wheeling's top village staff began to mount. Now, the village is about finished amassing the administrative muscle it needs to push toward upgrading Wheeling's image, with the latest hire of a new assistant village manager.

**J. Mark Rooney**, the city administrator of Highwood, has been named Wheeling's new assistant village manager. "The volume of work here is such that we need two people to not only handle the day-to-day business, but also keep an eye on the bigger picture - being, where the village is going long term," Village Manager Wally Douthwaite said. If the village manager has to focus on such things as reviewing liquor licensing fees, he'll be distracted from "what are we doing downtown, what are we doing with a Kmart lease, what are we doing with a transit study," Douthwaite said.

**Rooney**, 43, will coordinate Wheeling's three redevelopment districts, negotiate the renewal of Wheeling's waste contract and manage special projects. He served seven years as Highwood's administrator and will fill a position left vacant in February 2002 when former Assistant Village Manager James Grabowski temporarily stepped in to fill Wheeling's top executive position.

That job was left empty by the dismissal of former Village Manager Craig Anderson, which later added to vacancies at the top of Wheeling's public works, community development, airport management and village attorney divisions. All of those vacant positions are now full. Wheeling is interviewing to fill a newly created position of public relations coordinator to be more efficient in informing residents of village news, Douthwaite said. The new staff member also will work with the Wheeling Special Events Commission on publicizing the annual Taste of Wheeling and other events.

# **Section 8**

## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

Highland Park News (IL) June 24, 1999

### **Highwood Cops Say City Dragging its Feet**

Author: Kenneth L. R. Patchen

The Metropolitan Alliance of Police has filed an unfair labor relations practice complaint with the Illinois State Labor Relations Board against the City of Highwood on behalf of Highwood Police Officers. As of Tuesday afternoon, village officials and city contract negotiators had yet to receive notification of the filing and were unable to discuss the charges contained in it. City Administrator **Mark Rooney** said he expected the contract negotiations to take place during the first week of July. Negotiations had been set for that time because attorneys for both sides would be able to meet at that time. Union attorney John Rossi said that a draft contract for Highwood Police Officers had been submitted to the city in late April or early May. The city had expressed a desire for more and more time to review the language of the contract.

During the week of June 7, the union filed an unfair labor relations practice charge with the Illinois State Labor Relations Board, according to Rossi. Highwood Police union President Jeff Neimark expressed optimism about the ultimate outcome of negotiations between the union and city. "The future definitely looks optimistic, especially because of state labor laws in place." Highwood Police Officers voted to be represented by the Metropolitan Alliance of Police in March. At that time, City Administrator **Mark Rooney** had said, "We will negotiate in good faith if they decide to have a union or if they don't." Incorporated in 1984, MAP is made up of sworn police officers up to the rank of lieutenant and civilian employees who work full or part-time with state, county, or municipal law enforcement agencies. MAP officials have stated that their union is concerned with the ideals of police professionalism. In the past, Highwood union officials have expressed "The future definitely looks optimistic, especially because of state labor laws in place. Concern about overtime pay, scheduling, and the amount of turn-around time between work shifts.

Union officials have expressed additional concerns. "We're hoping for fire-arms training. We haven't had it for several years and (it is) a mandate of federal law," Neimark said. Neimark also said that regular pursuit training is needed for officers. "It is also mandated by federal law." "Basically we want to solidify our benefits," he said. There is a concern about salary, according to Neimark. He said he expects the police department union contract to benefit the city. A negotiated agreement will lead to better police equipment and better additional training. "It is one of the things that will help us and the city down the road." Negotiations on a contract between the city and union were initially delayed last summer when the city claimed it did not have enough employees to meet eligibility requirements for cities that can negotiate with unions. Highwood argued that on-call firefighters are independent contractors and should not be included in personnel counts. That argument was not accepted and the city was told to negotiate with the new police union. "We're very optimistic," Neimark said. "We're going to move ahead."

## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

Highland Park News (IL) July 24, 1997

#### Rooney Called Up to Serve Tour in Bosnia

Author: Steve Zalusky

The U.S. Army will get to see two sides of Highwood City Administrator **Mark Rooney** this month.

#### **HIGHWOOD**

On Wednesday, **Rooney**, who is in the Army reserve, will be called up for a brief tour of duty that includes trips to Germany, Hungary and Sarajevo, the former capital of Yugoslavia. By the end of the month, though, **Rooney** will travel to Washington, this time to wrangle with the Army as he takes part in negotiations for the transfer of Fort Sheridan to Highland Park and Highwood.

During his European stint, **Rooney**, a captain, will help the Army identify its needs for the next 18 months, if troops continue to be deployed in Bosnia that long. "It's kind of ironic," said **Rooney**, as he recalled that he argued for the deployment with his then-boss, former Sen. Paul Simon. "It came home to roost for me."

**Rooney** has already seen plenty of action. He volunteered for duty in the Persian Gulf, where he narrowly missed being hit by a Scud missile. He was walking toward a building that blew up right in front of him. "I saw a lot of people die in front of me," he said. "Everything gets easier after that." **Rooney** now serves in a data processing unit that, among other duties, enables e-mail to be sent across the countries where the operation is being conducted. It has also kept track of inventory being shipped into the theater.

He originally joined the Army as an enlisted man in 1983. He eventually attended Officer Candidate School. The U.S. force, originally as high as 18,000, has dwindled to 12,000, **Rooney** said, mostly in Hungary and Bosnia. "The troops over there know they're doing something worthwhile," **Rooney** said, adding that if the Americans don't do the job, the Europeans won't either.

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# **Section 8**

## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

Highland Park News (IL) March 14, 1996

#### **Highwood Gets Administrator**

Author: Barbara Bell

Highwood is a changing town. For the first time in the city's 109-year history, Highwood has a professional city administrator. He is 36-year-old **Mark Rooney**, who was a liaison for Sen. Paul Simon on the Joint Fort Sheridan Planning Committee and helped write federal legislation to transfer the property to Highwood and Highland Park as well as transferring the golf course to the Lake County Forest Preserve.

**Rooney**, who is a captain in the Army Reserves at Fort Sheridan, has completed the course work for his master's degree in public administration at Northern Illinois University and is working on his thesis. **Rooney** will be paid a salary of \$35,000. "This is the last community on the North Shore to my knowledge not to have a professional form of government," **Rooney** said.

Mayor John Sirotti said he and the City Council had been considering hiring an administrator for two years. "We have to look at the city as a business," Sirotti said. "A city administrator is almost a must in this world." Sirotti is particularly pleased to have hired **Rooney**, who has been on the job about three weeks. "We were real fortunate to get him, I felt," the mayor said. "He's sincere about his interest and wanting to help us improve and move forward. The best thing everyone liked about him is he's excited about the future."

Indeed **Rooney** is. He said he feels "blessed" to be Highwood's city administrator. He's particularly excited about the development of Fort Sheridan by Stein & Co. because the fort will be the last piece of lakefront property to be developed on the North Shore. As Highwood's city administrator, **Rooney** will oversee the day-to-day operations of the city. In June, Highwood will receive its first payment of property taxes for city operations. Voters approved a referendum proposal last fall to raise taxes to pay for more city services.

Eventually, **Rooney** will develop a budget for all of Highwood's operations. Currently, the city operates under an appropriations ordinance in which a sum of money is approved for expenditure but not broken down by line item. Under a budget, each department is given a certain amount of money, and big expenditures such as a new fire truck are planned by placing money in cash reserves. "It tells the citizens where their money is being spent. It's the highest form of accountability," **Rooney** said of a formal budget. He hopes the city will be able to adopt a budget in 1997. "That's a goal," he said.

Another one of **Rooney's** responsibilities will be coordinating community policing at North Shore Estates, an apartment complex primarily inhabited by Hispanics. The police department plans to have an officer based there seven days a week to help residents and deter crime. In addition, other services such as health care would be provided to residents. A goal of community policing is to integrate Hispanics into the Highwood community. "They need someone to

# **Section 8**

## Internet – Newspaper Archives Searches J. Mark Rooney

(Articles are in reverse chronological order)

coordinate a lot of that actual work with outreach agencies," **Rooney** said. "You have to manage change in a positive fashion."

**Rooney** and his wife, who live in Northbrook, were the last couple to have their wedding reception at Fort Sheridan. In fact, the officers club had officially closed but it was reopened for **Rooney**, a veteran of Desert Storm. "I have an emotional attachment to Fort Sheridan," **Rooney** said. He's also affectionate toward Highwood. "For me, it's going to be a great opportunity," **Rooney** said.

Research Compiled by: Shannon Farr & Amanda Dillabough

Colin Baenziger & Associates



# Section 4 Michael A. Giardino Belle Isle City Manager Candidate Report

f.

### Section 4

### **TABLE OF CONTENTS**

|                         | <u>PAGE</u> |
|-------------------------|-------------|
| COVER LETTER AND RESUME | 1           |
| CANDIDATE INTRODUCTION  | 7           |
| BACKGROUND CHECKS       | 15          |
| CB&A REFERENCE NOTES    | 21          |
| INTERNET SEARCH         | 27          |

# Cover Letter and Resume

### MICHAEL A. GIARDINO

143 Hollinwell Williamsburg, VA 23188-7468 (305) 433-1566

April 15, 2023

Colin Baenziger Colin Baenziger & Associates 2055 South Atlantic Avenue Suite 504 Daytona Beach Shores, FL 32118

Dear Mr. Baenziger:

I received notice from your firm that the City of Belle Isle, Florida is searching for a City Manager. I would like to apply for the position.

I am an achievement-oriented manager with 37 years of progressively increased leadership experience and 16 solid years of municipal government services leadership experience as an Airport Chief Executive Officer, Village Manager/Treasurer and as second in command of Naval Air Station Key West (NASKW).

Airport Chief Executive Officers are tasked with providing safe, efficient, economical air transportation for the traveling public and promote economic development, trade, and tourism throughout the community. As Executive Director, Peninsula Airport Commission (PAC) (a political sub-division of the Commonwealth of Virginia), I was akin to a city manager, and I completely turned a failed organization around. As Director of Aviation for the County of Monroe and Administrative Director of the Monroe County Airport Authority (MCAA) (an independent public benefit corporation created by the State of New York), I brought prominence and pride back to an airport marred by scandal. Each airport had serious problems; Newport News / Williamsburg International (PHF) faced insolvency, possible commercial air service extinction, and my predecessor was convicted of 22 federal felony counts. I led PHF through the COVID-19 pandemic with no shutdowns. Before my arrival at the Greater Rochester International Airport (ROC), it had faced over two years of scandal. Now, PHF is on an upward trajectory with a \$193M capital improvement plan and ROC was the first winner of a statewide competition awarded \$39.8M toward an aggressive two-year \$79M debt-free capital improvement project to create a 21st Century Airport. It won thirteen awards for improved customer experience, environmental consciousness, and innovative technologies. I recruited new air service/concessions, lowered/stabilized expenses, and restored integrity at both airports.

As Executive Officer in Key West I was the Chief Operating Officer (COO) / Chief of Staff responsible to the Commanding Officer for the safe, efficient employment of 800 employees across a myriad of support services and functions. I was Acting Commanding Officer for eight months. My duties were like a CEO / COO responsible to a Board of Directors. The base is 6,300 acres within the Florida Keys National Marine Sanctuary bordering federal, state, county, city, and private properties surrounded by miles of shoreline. This geography provides unique environmental compliance and compatible land use challenges. Key West is also a diverse cultural community rich in tourism and recreational activities. The base had its own

sewage treatment plant, 800 on-base housing units, two marinas (one live aboard), over 1,000 government-hotel guest beds, four waterfront recreation areas, 500 recreational vehicle sites, a bowling facility, three gyms, an elementary school, a childcare facility, three fire houses, police with investigative capability, a grocery store, a department store and much more.

At the Village of Brockport, I was the Chief Operating Officer (COO) and Treasurer/Chief Finance Officer (CFO). I was a sworn finance officer of the State of New York responsible with fiscal conformance using a uniform system of accounts prescribed by the state comptroller and pursuant to New York law. The Village is the home 5,000 residents and the State University of New York SUNY Brockport with a total enrollment of 7,000 students. I administered Brockport Water and Sewer Enterprise and Brockport Fire District funds.

I interact effectively with people from a wide variety of ethnic and socio-economic backgrounds. I also have considerable experience working effectively with all types of media. I adhere to the highest ethical standards and held a Confidential, Secret or Top-Secret clearance for over 25 years. I was nationally recognized as "2016 Community Person of the Year" by the Hearing Loss Association of America for work on their Professional Advisory Committee and efforts made at the Rochester airport to install hearing loop technology.

I have operated in challenging environments all over the world. I have planned, developed, created, and adapted strategies that achieved success. Cockpit or Boardroom; military or civilian; on land and at sea; I have been face to face with: the President of the United States, the Secretary General of NATO, the Supreme Allied Commander Europe, a former United Kingdom Prime Minister, Governors, members of Congress and their staffers. I have achieved positive results from Kabul to Newport News / Williamsburg maintaining the highest ethical standards and personal integrity. I was in the Pentagon on 911 and deployed with NATO forces twice to Afghanistan. I am cool and calm under pressure. I am used to challenging circumstances. I fixed NASKW's hurricane evacuation reimbursement program after the failures after WILMA in 2005, ensuring every IKE (2008) evacuee was reimbursed within two weeks of their return. I end failed practices and turn strategic visions into tangible results.

I am collaborative. I encourage teamwork, empowerment, and cross-functional training techniques. I am experienced in working in complex, multijurisdictional geographic areas. I ask for advice and can admit when I am wrong. My door is always open, and I expeditiously answer correspondence. I am experienced in multiple forms of governance.

With my background and interdisciplinary experience, as well as my master's degree in National Security and Strategic Studies from the Naval War College, and a graduate education in Information Technology Management from the Naval Postgraduate School, I am certain I can be a valuable member of the Belle Isle management team. I look forward to hearing from you.

Sincerely yours,

Michael A. Giardino

More at: https://www.linkedin.com/in/michael-giardino-16450019/

#### MICHAEL A. GIARDINO

143 Hollinwell, Williamsburg, VA 23188-7468 (757) 378-2123 (H), (305) 433-1566 (M), E-mail: michaelagiardino@gmail.com

### Summary

High-energy aviation leader, planner, team builder and communicator with years of sound, effective decision-making and problem-solving experience in complex, demanding environments. Accomplished in guiding diverse organizations to achieve challenging goals, improve organizational performance, and manage scarce financial resources, while providing for individual growth and achievement. Relevant skills include:

- Leadership/Crisis-Emergency Management
- Financial Management
- Business Development
- Human Resource Management
- Government Operations/Program Planning
- Community/Media Relations
- Government Processes & Relations
- Facilities/Environmental Management

### Accomplishments

Leadership/ Crisis-Emergency Management (EM) Changed cultures/images of ROC/PHF after dishonorable departures of three predecessors (one convicted of 22 felonies). Leading in the aftermath of FAA and State investigations, two civil lawsuits, a federal criminal trial, and a Global Pandemic. Rebranded commercial service airports. Zero major discrepancies at PHF, ROC & NQX during scores of compliance inspections. Immediate Past ACI-NA Small Airport Chair led on legislative and policy issues facing airports.

Financial Management/ Business Development Increased PHF bottom line \$16M in 5 years. ROC won state competition grant leading to 13 awards for a \$79M debt-free project. Left ROC with nearly zero debt, reduced Residual Airline Fees by 62% & Cost Per Enplanement by 57%. Recruited PHF's first new commercial service in 8 years and largest ever privately funded airport development project. Secured \$847,000 SCASD Grant.

Human Resource Management Focused on fostering great culture and taking care of people. Right-sized airport HR budgets (normal and pandemic). Revised police/fire department work schedules saving overtime. Instituted Interest-Based Bargaining Unit team & bilingual training. Airports received overdue pay raises from conservative budgets.

Government Operations/ Program Planning Career of international, federal, state, and local government experience. Conscientious steward of federal and state grants attaining millions in discretionary funds for aging infrastructure. Decades of experience working with government and private concerns to get the job done. Aggressive yet comfortable in competitive federal and state grant funding arena.

Community Relations / Government Relations Initiated jet noise monitoring program/mitigation strategy. Hosted two "Blue Angels," one "Thunderbirds" air shows, numerous 5K events raising hundreds of thousands of dollars for charitable organizations. Frequent radio and TV (local, CNN) guest and print contributor. Aggressive community advocate experienced in Washington, D.C. and state capitals getting things done for localities.

Facilities Management Focused on fun and the "Passenger Experience." The **inaugural winner** of a New York State-wide competition leading to a \$79M Terminal Revitalization that won 13 awards, including the 2018 (first year) AAAE Innovation Award, for innovation and sustainability. Leader on newest technologies and innovations especially for persons with disabilities. Recognized regionally and nationally by the Hearing Loss Association of America as Community Person of the Year.

More at: https://www.linkedin.com/in/michael-giardino-16450019

Michael A. Giardino page 2

### Work History

#### Interim Airport Assistant Director, City of Brownsville KBRO

2023-Present

Directs, plans, manages, and organizes all functions at Brownsville South Padre Island International Airport.

### Executive Director, Peninsula Airport Commission (CEO) KPHF

2017-2023

Led staff of 90 for six politically appointed Commissioners. Restored tarnished brand and culture. Saved airport from insolvency. Led through COVID-19. \$8M operating budget and \$193M capital plan.

### Director of Aviation / Administrative Director (COO/CEO)

2012-2017

Monroe County, New York / Monroe County Airport Authority

Led a staff of 120 personnel for a 7-member Authority Board and elected County Executive in operating the Greater Rochester International Airport (KROC). Directed and executed \$32M operating budget and \$79M aviation capital improvement project that won 13 awards. Restored integrity.

### Village Manager / Treasurer (COO/CFO) Brockport, New York

2011-20

Provided most economical/efficient overall direction, coordination and control of the day-to-day activities and operations. CFO prepared, oversaw, and executed Village annual budget.

### Executive Officer Naval Air Station Key West KQNX

2007-2011

Deputy Commander/Naval Aviator. Chief Operating Officer (COO) directed daily operations of 7 annexes, covering 6,300 acres, supporting 39 tenants, 5,500 employees receiving 20,000 visitors per year. \$55M operating budget. Directed 12 department heads and 800 employees.

- Section Head, Special Air Operations, Ramstein, Germany.
   Director of Air Operations (Kabul) and Lead Planner, Kandahar Afghanistan
   Supervised all NATO Allied Command air operations in Afghanistan as Chief of Air Operations.
   Planned/Designed/Budgeted operations and sustainment of Kandahar multi-national base.
- Operations Analyst Section Head, Chief of Naval Operations Program.
   Assessments Division, Pentagon, Washington DC

9/11 survivor. Program budget and research analyst for operations and maintenance programs totaling over \$1B. Conducted theoretical, statistical and simulator analyses of complex systems.

### Previous work experience includes:

U. S. Navy Officer. Top Secret/SCI/SAP clearance. Mishap-free Naval Aviator with over 2,450 flight hours. Credited with 110 helicopter-borne rescues after Hurricane Floyd-awarded the Air Medal. Maintenance Officer responsible for 14 aircraft and 250 personnel executing \$9M budget. Leader of seagoing units flying dangerous missions in harsh environments. Nuclear Weapons Safety Officer.

Education U. S. Naval War College Master of Arts

Naval Postgraduate School Graduated
U. S. Navy Aviation Undergraduate Flight Training
State University of New York College at Brockport Bachelor of Science

Affiliations Virginia Peninsula Chamber of Commerce Board of Directors (ex-officio)

ACI-NA Small Airports Committee Immediate Past Chair (Two Year Term)

Board of Directors, Virginia Aviation Operators Council (VAOC) Board Member, Hampton Roads Transportation Organization

Past President, New York State Aviation Management Association (NYAMA) Certified Member, C.M., American Association of Airport Executives (AAAE) National/Regional Person of the Year, Hearing Loss Association of America

# Candidate Introduction

### **MICHAEL GIARDINO**

### **EDUCATION**

Master of Arts, Naval War College Graduated, Naval Postgraduate School Bachelor of Science, State University of New York College at Brockport

### **EXPERIENCE**

| Airport Executive Management Consultant, Brownsville, TX   | 2023 – present |
|--|----------------|
| Airport Chief Executive Officer, Newport News, VA          | 2017 - 2023    |
| Airport Chief Executive Officer, Rochester, NY             | 2012 - 2017    |
| Village Manager/Treasurer, Brockport, NY                   | 2011 - 2012    |
| Executive Officer/Acting Commanding Officer, Naval         |                |
| Air Station Key West, FL                                   | 2007 - 2011    |
| NATO HQ Section Head Ramstein, Germany/Chief               |                |
| NATO Air Operations, Kabul Afghanistan/Lead NATO           |                |
| Transition Team Planner, Kandahar, Afghanistan             | 2004 - 2007    |
| Lead Operations Research Analyst, Pentagon, Washington, DC | 2001 - 2004    |
| United States Navy Officer/Naval Aviator                   | 1985 - 2011    |

### BACKGROUND

My diverse career, in and out of the military, is why I will blend the last 16 years together in explaining my background and why I am qualified for the position. As an Airport Chief Executive Officer, Village Manager/Treasurer and as second in command of Naval Air Station Key West (NASKW), I have been an integrator who can focus on the desired outcomes while ensuring minute details get proper attention. Airport Chief Executive Officers (CEO) are tasked with providing safe, efficient, economical air transportation for the traveling public and promoting economic development, trade, and tourism throughout the community. As Executive Director (ED), Peninsula Airport Commission (PAC) (a political sub-division of the Commonwealth of Virginia), I completely turned around a failed organization. As Director of Aviation for the County of Monroe and Administrative Director (AD) of the Monroe County Airport Authority (MCAA) (an independent public benefit corporation created by the State of New York), I brought prominence and pride back to an airport marred by scandal. Each airport had serious problems; Newport News / Williamsburg International (PHF) faced insolvency, possible commercial air service extinction, and my predecessor was convicted of 22 federal felony counts. I led PHF through the COVID-19 pandemic with no shutdowns. The Virginia Peninsula is home to the headquarters of the U.S. Army Transportation Command, the U.S. Air Force Air Combat Command, Newport News Shipbuilding, NASA Langley Research Center, Jefferson Laboratories, the U.S. Coast Guard Training Academy, and other major federal employers. The Peninsula also has a significant presence from a wide array of international

companies such as Cannon, Liebherr Mining, and Smithfield Foods. Before my arrival at the Greater Rochester International Airport (ROC), it had faced over two years of scandal. Rochester is the home of Eastman Kodak Company, Wegmans, and Harris Corporation and the former home of XEROX, Bausch and Lomb, RAGU, and other international companies. In Monroe County, New York (population 750,000) Government, I was third in line for Emergency Management (EM) command structure behind the elected County Executive County and her deputy. Because of my efforts, PHF was on an upward trajectory and ROC was the first winner of a statewide competition awarded \$39.8M toward an aggressive two-year \$79M debt-free capital improvement project to create a 21st Century Airport. It won thirteen awards for improved customer experience, environmental consciousness, and innovative technologies. I recruited new air service and concessions at both airports while lowering or stabilizing expenses. As Executive Officer in Key West I was the Chief Operating Officer (COO) / Chief of Staff responsible to the Commanding Officer for the safe, efficient employment of 800 employees across a myriad of support services and functions. I was Acting Commanding Officer for eight months. My duties were like a City Manager or County Administrator. The base is 6,300 acres within the Florida Keys National Marine Sanctuary bordering federal, state, county, city, and private properties surrounded by miles of shoreline. This geography provides unique environmental compliance and compatible land use challenges. Key West is also a diverse cultural community rich in tourism and recreational activities. The base had its own sewage treatment plant, 800 on-base housing units, two marinas (one live aboard), over 1,000 government-hotel guest beds, four waterfront recreation areas, 500 recreational vehicle sites, a bowling facility, three gyms, an elementary school, a childcare facility, three fire houses, police with investigative capability, a grocery store, a department store and much more. At the Village of Brockport, I did much the same however, as Treasurer, I was a sworn officer of the State of New York and was the chief fiscal officer of the village responsible with fiscal conformance using a uniform system of accounts prescribed by the state comptroller and pursuant to New York law. I administered the Brockport Water and Sewer Enterprise Funds, as the Village ran its own water systems. The systems serve 8,106 residents through 1,761 residential metered connections, also providing water to the faculty and students of both the Brockport Central School District and the State University of New York (SUNY) College at Brockport with its 5,500 undergraduate student population.

The three most significant issues facing my most recent industry are:

- Effects of the COVID Pandemic. The pandemic had the same negative effect on the airline industry as September 11, 2001. Airline passenger traffic nearly ground to a halt in April 2020 and has not fully recovered to pre-pandemic 2019 numbers. Some small airports may never recover. The airports I have been involved with have had to adjust workforce, control other expenses, and mitigate the loss of revenue. One airport was on target to lose \$430,000 each month before bold actions were taken to reduce that number to about \$100,000 per month. While business returned, airlines consolidated service and programmed other efficiencies that has prevented full recovery.
- Regional Jet Pilot Shortage. Compounding the pandemic-effect, is the lack of commercial

service airline pilots. Pilot shortages were being predicted as far back as 2010 when experts forewarned the eventual mandatory retirement of a generation of pilots. To reduce expenses during COVID, airlines offered early retirements that later exacerbated the pending effects of those retirements. Just like with COVID, smaller airports were most affected by the pilot shortages as the smaller regional carriers did not have the inventory of pilots to replace those whom they lost when depleted major airlines recruited the regional pilots to backfill their retirees. The issue remains and 68 airports have less commercial airline service than before. This effects communities who are trying to recruit business and jobs because corporations normally look more favorably on communities with thriving airports and good commercial air service.

• Money for aging infrastructure and the effects of inflation on capital projects. The airports and communities I have served are experiencing the effects of aging infrastructure, limited funding, and rising inflation. Aging infrastructure consumes finite human and financial resources, is less efficient, may not be code compliant, and requires more maintenance. Replacing aging infrastructure is becoming more costly due to inflation.

### **GENERAL, MANAGEMENT STYLE AND EXPERIENCE**

I am in search of a leadership employment opportunity in a quality community where I can make difference. The challenges facing Belle Isle are familiar to me and I know I can make a difference.

My management style is collaborative, delegative, and decisive. It is deeply rooted in having the very best decision-making tools and information available. Data is abundant but without proper analysis by intelligent and creative minds, data is useless. Assembling, assessing, mentoring, working, and sharing ideas with (listening to, learning from) bright, talented, and hardworking people has always been the most rewarding part of my professional life. I have collaborated in a myriad of environments, with a vast array of individuals, to achieve great success. I lead and I create leaders. I have been in the cockpit and in the boardroom - time constrained in both. In every role I've attempted to build consensus while encouraging dissenting arguments to make the best possible decision. If the facts, analysis, environment, or situation dictates, I am confident in my ability to admit when it is time to change course when necessary.

My most recent airport staff presented me with a "home grown" achievement award just out of the blue. We weathered some very hard times, and it was their way of showing appreciation. It is one of my most cherished recognitions. I have rarely had the opportunity to choose the people I work with. I have learned to judge strengths and weaknesses as a leader, manager, administrator and even flight instructor. Employees must understand the organization and what is expected of them for success. They must be equipped to do their jobs well and, when able, be allowed to have time for professional development and cross training. A chain of command is essential, but I encourage collaboration. I have fostered individual and organizational growth throughout my

career. I set strategy but allow for tactical creativity. I enjoy mentoring and watching people achieve their goals. My former Navy subordinates were selected for senior command positions.

One of the elected officials that hired me called it one of the (if not the) best decision she ever made. Others would say that I am hard working, full of integrity, loyal, trustworthy, and knowledgeable. Because I worked in airports, there are a few elected officials that would say I am inflexible but that is because they were not familiar with the rules and regulations having to do with airport funding and other state and federal regulations. Those who chose to receive training and accepted my numerous offers to meet and discuss airport governance usually changed their views after a few sessions.

My greatest strength is matching the appropriate resources to task. Whether it is human or financial capital, I can see the 30,000-foot view and break it into grass roots details. Then, by applying the proper people, tools, and sequence of events, I get the job done. I do this through collaboration, analysis, and task organization. Running a commercial service airport during the pandemic required consensus building, accurate financial forecasting, human resource finesse, political savvy, and bold decision making. The airport went from losing \$430,000 per month to near breakeven per month in just three months.

In terms of weaknesses, I recognize that at times I tend to over explain things. Over time I have learned to choose brevity over longwinded explanations while always leaving my door open for anyone needing clarification and/or assistance with my words.

With an undergraduate degree in meteorology, a pilot's mind, and extensive practical experience in operations research analysis and financial management, I follow the numbers. That said, I believe in intuition, "gut feel," and observation. I pay respect to historical data but, I fight the urge to "predict the last storm (or hurricane)" (each event/task/emergency/situation is different). The abundancy of data can lead to over analyzing. It is important to assemble team members that are diverse in thought, yet likeminded in goal attainment. Choosing the right metrics is a challenge unto itself. Analytics is a tool, not the answer.

While I consider rescuing 110 people in the aftermath of Hurricane Floyd in 1999 my great achievement, my greatest professional accomplishment pertaining to my ability to manage and lead in a municipal government role came at the Greater Rochester International Airport (ROC). At ROC, we won a statewide competition that awarded the airport \$39.8M toward an aggressive two-year \$79M capital improvement project to create a 21<sup>st</sup> Century Airport. The project incorporated "smart" technologies and numerous access improvements - especially for persons with disabilities. ROC was the program's first awardee, and our grant submission became the hallmark for other airports to emulate. The award allowed completion of a 7-year plan in two years while adding an outdoor road canopy delivering customer and community-tailored results - incurring no additional airport debt. The project won 13 awards for innovation, including my Community Person of the Year award from the Hearing Loss Association of America (HLAA). The project funding was dependent upon an aggressive timeline set by the Governor. It met the

#### deadline.

My biggest failure was to fully shed the troubled history of the Newport News – Williamsburg International Airport. Just as we turned the corner financially and my predecessor was finally brought to trial and convicted of 22 federal felonies, the COVID-19 Pandemic struck. Although the overwhelming choice to right the ship, I never gained the support of the majority municipality's elected officials, appointed commissioners, or their appointed staffs. My methods, strategies, and leadership were lauded by airport experts nation-wide and by the minority (Hampton, VA) city-appointed commissioners but, I never gained the respect of Newport News city officials. I can never know why it did not work, as it was never explained to me so, I will use the experience to ensure I am aligned with the next organization that I serve.

Except for layoffs due to the COVID pandemic, the reasons for terminating the employment of anyone in my charge has been for violations of policies and procedures, unlaw acts, or conduct detrimental to the organization. In every case, careful considerations were made, investigations were conducted, employees were given an opportunity to present contrary evidence, and, in most cases, employees received counseling, remedial training, and were placed on a Performance Improvement Plan (PIP) before being terminated. I always showed compassion for employees I had to fire but, I always did what was right for the organization.

The challenges I see facing the City of Belle Isle are:

- Maintaining a high standard for residents' quality of life, while dealing with encroachment (crime, airport noise, cut through traffic, etc.) without creating an unwelcoming environment.
- Earning the respect of the County, State, and airport officials to be treated as an equal partner in government.
- Finding opportunities to improve infrastructure without stressing financial resources.

During the first six months my efforts will involve:

- Getting to know staff and what they do. I will pay particular attention to their ideas on how to improve.
- Meeting with City Council Members to establish our relationships, learn their priorities, as well as their work-methods/communications preferences.
- Introductions with community leaders, neighborhoods, civic organizations establishing those relationships and learning about things that aren't found in meeting minutes.
- Immerse myself into the issues at hand. I will establish relationships with state, county, and airport officials. I will then strategize with City Council and staff to develop our growth, encroachment, land management, and infrastructure plans.

Starting as a public affairs officer (PAO) on an Amphibious Navy Aircraft Carrier hosting

### **MICHAEL GIARDINO**

international media during the Bosnian Conflict, I have had extensive media experience. I have embraced social media as a tool when promoting good news and delivering essential information during emergency management events. Traditional or social media, I ensure accuracy and correct the record when necessary. I believe in partnering with the media to keep the public informed and I respect the media's mission to keep government honest. I am happy to take the lead role when addressing the media but, always defer to elected leadership to decide when that will happen.

I do not anticipate anyone contacting the city with negative comments about me. There has been significant negative media coverage of the Newport News — Williamsburg International Airport mainly having to do with my predecessor who was convicted of 22 federal felonies and terminated for other nefarious behavior. Any negative media coverage during my tenure had to do with those legacy issues and the media's attempt to link the past as "click bait" to the present pandemic challenge and my clean-up efforts.

In my spare time, I enjoy traveling and walking with my wife, and spending time with our family, especially our grandson. I am also a big sports fan.

### SIX ADJECTIVES OR PHRASES I WOULD USE TO DESCRIBE MYSELF

- Honest
- Loyal
- Intelligent
- Experienced
- Ethical
- Confident

### REASON FOR DEPARTING CURRENT POSITION

I am working as an independent consultant now and my employer is aware of my search for permanent employment. In February, the Peninsula Airport Commission exercised its right to terminate my employment without cause via a 4-1 vote. The vote was along municipality lines, the City of Newport News commissioners for, and the lone City of Hampton commissioner against. Two weeks earlier another Hampton Commissioner resigned over what he told me was how poorly I was being treated by the board. It has since been revealed in the press that members of the board were secretly meeting with at least one member of the Norfolk Airport Authority Board about the future of Hampton Roads airports. It appears that my former commission (or at least the members from Newport News) and I were not on the same page, without my knowledge. In five years I never received a negative performance review. I was given raises and bonuses every year except during COVID-19 when the airport

### **MICHAEL GIARDINO**

was fiscally stressed. Although owed a large severance package with benefits, I was quickly recruited for an interim leadership position at a commercial service airport, and I accepted it. I am in that position now. My contract runs through July 24, 2023, with a 30-day notice to terminate early.

### **CURRENT / MOST RECENT SALARY**

My final compensation at the Peninsula Airport Commission was \$184,000, including vehicle allowance. My rate as an independent consultant with the City of Brownsville is \$10,000 per month, plus expenses for housing, vehicle, and travel to my home in Virginia.

# CB&A Background Checks

# **Background Check Summary for MICHAEL "MIKE" ANTHONY GIARDINO**

### **Criminal Records Checks:**

Nationwide Criminal Records Search No Records Found

County

Williamsburg City, VA
Cameron County, TX
No Records Found
Monroe County, NY
No Records Found
No Records Found

State

VirginiaNo Records FoundTexasNo Records FoundNew YorkNo Records FoundFloridaNo Records Found

### **Civil Records Checks:**

County

Williamsburg City, VA
Cameron County, TX
No Records Found
Results Pending
Monroe County, FL
No Records Found

Federal

VirginiaNo Records FoundTexasNo Records FoundNew YorkNo Records FoundFloridaNo Records Found

**Motor Vehicle** 

Virginia No Records Found

**Credit** Excellent

Personal Bankruptcy No Records Found

Sex Offender Registry

Not Listed

# **Background Check Summary for** MICHAEL "MIKE" ANTHONY GIARDINO

**Education** Confirmed

**Employment** Confirmed

Social Media Nothing of Concern Found

Under the Fair Credit Reporting Act, 15 U.S.C. 1681-1681Y, credit and bankruptcy information are very sensitive and should not be used be in the consideration of hiring. The information is included for each candidate because we do not want you to be surprised if third parties raise what they consider to be a concern. Also, some states have limited the reporting to seven years, so any records older than that will not be available in those states. In addition, motor vehicle reports are limited to three to seven years, depending on the state.

f.

### **Section 4**

### Background Check Summary for MICHAEL "MIKE" ANTHONY GIARDINO Personal Disclosure

|                   |  |                                  | Person                               | nal Disclosur  | e Questionnaire                               |  |  |
|-------------------|--|----------------------------------|--------------------------------------|--|---|--|--|
| Name              | of Applicant:  | M                                | ichael                               |  |   |  |  |
| elimir<br>and the | nated from all fat charges do not ensation. The  | further se<br>not mean<br>bottom | earches conducte                     | ed by this firm. V   | we understand that frive                      | ure to our client concerning your<br>our past will result in you being<br>plous charges are sometimes made<br>been wronged and needed to seek<br>fully informed. If you have any |  |
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| 6.                | 6. Have you ever been charged with driving while intoxicated?  |                                  |                                      |  |   |  |  |
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Please email this form via PDF DOCUMENT to Monique@cb-asso.com or via fax to (561) 621-5965 no later than 5:00 PM MST 05/15/2023.

# Background Check Summary for MICHAEL "MIKE" ANTHONY GIARDINO Personal Disclosure Explanation

Michael Giardino

Supplement to question 9 of Personal Disclosure Questionnaire for Belle Isle City Manager

While not embarrassing to me at all (and thus an answer of "no" on the questionnaire form), an explanation of my termination from the Peninsula Airport Commission is warranted as there was immediate television and print news coverage. Again, not embarrassing to me at all.

Synopsis.

On February 13, 2023, the Peninsula Airport Commission voted 4-1 to terminate my contract WITHOUT cause, effective March 15, 2023. (Airport consultant Michael Boyd recently wrote about it (I have attached it)). The Commission is made up of four members from the City of Newport News and two members from the City of Hampton. The vote to terminate my contract was along those city-lines. Newport News for termination, Hampton against. Two weeks prior (last week in January 2023) a Hampton Commissioner objected to how I was being treated and he resigned from the board. Before the vote to terminate me, the remaining Hampton Commissioner and former Commission Chair told me, it "would be disastrous if I left the airport."

The board turned over many times in my five years. Since my recruitment there have been a total of 12 different Commissioners on a six-member board. The City of Newport News had little to do with my hire in 2017. Before my recruitment, the Newport News City Manager, who also served as the Commission Chair, resigned in disgrace over an airport (People's Express Airlines 2.0) investigation and scandal. The scandal brought unwelcomed notoriety to the airport and the City of Newport News, eventually leading to federal criminal indictments. I inherited an awful situation, some of which was not revealed to me during my recruitment. I had a lot of work ahead of me cleaning up the mess.

Unbeknownst to me, there were numerous "sweetheart" arrangements at the airport that were unlawful and not in compliance with FAA Grant Assurances. I abolished those practices. After I cleared the airport of the FAA and State investigations in early 2018, two Newport News commissioners that hired me were swiftly replaced. My predecessor was eventually convicted of 22 federal felonies. In 2022, a candidate for Newport News Mayor did an on-airport television interview openly criticizing my effort to close an on airport mobile home park that violated federal law having to do with airport revenue diversion. I was not popular downtown or with political donors.

Bottom line: I was hired to restore integrity to the airport after the scandals, and I did. I stand by my record. I have canvassed colleagues and aviation industry experts. Each person I've had contact with (including ADK staff), remains in my corner. I quickly got a job in Brownsville as Interim Assistant Airport Director while I look for a permanent position on the east coast of the US.

I have remained silent and never spoke with media. The PAC owes me \$90,000 in severance to be paid before March 15, 2024, and they are not contesting that. Avelo Airlines left the airport after my termination only a week after announcing extended scheduled service through September 2023. My former marketing and air service consultants refuse to work for the airport under the current Commission. The vote to terminate me was one sided.

# Background Check Summary for MICHAEL "MIKE" ANTHONY GIARDINO Personal Disclosure Explanation

Since then, it has been revealed in the local news that members of the board were secretly (without my and some board members' knowledge) conferring with members of the Norfolk Airport Authority (a competitor) to explore a relationship. According to the news clip, it also appears the PAC is not fully committed to commercial air service which is one of the many reasons I was brought to the airport. I refused to quit on the community and the employees, so I was let go without cause. I turned down a resignation offer because it was less than my contract severance package and they had no cause for termination.

I am proud of my work and accomplishments. I had the respect and admiration of the staff and commercial partners, and I reciprocated those sentiments. The Hampton Commissioners were solidly in my corner. I am productively working in the airport industry meeting with members of Congress as well as assisting the Brownsville airport with governance reform, the influx of migrants, and rolling out new commercial air service.

# CB&A Reference Notes

### Reference Notes Michael Giardino

### Bryant Walker - Brownsville Airport Director, TX (956) 459-1227

Mr. Walker has known Mr. Giardino since 2020. Mr. Giardino was hired as the Interim Director. He has already proven his ability to swiftly complete his work while addressing any issues very quickly and efficiently.

While working, Mr. Giardino commands control and is very task oriented. When he encounters an issue, he communicates to his supervisor and provides a detailed timeline for resolution. Communication is one of Mr. Giardino's strong points. He gives frequent status updates, and he wraps up every project with a detailed report.

Mr. Giardino is a skilled decision maker. His decisions are not only good, but they are also fact based. He consistently uses information and data to make decisions rather than making impulsive decisions based on emotion. He relies on his experience and work knowledge to make sound choices.

An example of Mr. Giardino's great leadership happened rather quickly after his arrival. He was responsible for a massive marketing campaign for a new airport route. Though he is not generally a marketing expert, he put together a strategic mix of marketing elements like publications, billboards, social media campaigns, and digital advertising. He managed the marketing firm and an outside partnering organization as well as three employees who were under his direct leadership. The campaign success was measured by enplanements. Anything over 50% is considered successful, he achieved 89% which is an impressive number.

In the position that Mr. Giardino held before working at the Brownsville Airport a Board decision was made that was negative for him. However, Mr. Walker believes that to be a matter of politics and not reflective of Mr. Giardino's job performance. Mr. Walker did not hesitate to hire Mr. Giardino and would like to keep him in Brownsville but understands that he has other obligations.

### Words or phrases used to describe Michael Giardino:

- Communicates well,
- Very task oriented,
- Leadership,
- Strategic,
- Experienced, and
- Knowledgeable.

**Strengths:** Communication, follow through.

Weaknesses: None identified.

### Reference Notes Michael Giardino

# Jamie O'Brien - Executive Assistant to CEO, Peninsula Airport Commission, VA (805) 258-1750

Mr. Giardino served as Ms. O'Brien's boss for one year. He has high integrity and a strong sense of what is right and what is wrong. Effective communication is one of the strongest points of his leadership style. He constantly provides employees with opportunities to grow and highly encourages growth.

When interacting with his employees Mr. Giardino made sure to communicate that he was always open to speak about any issues. The employees in the department leaned on him and one another. They were able to clearly communicate with each other and knew where each person stood. He created a team environment.

While in this role, Mr Giardino was highly regarded as informative and customer service oriented. He always kept the stakeholders at the forefront of his decisions. He was good at thinking creatively and remained professional at all times.

During his time in Newport News, there was a fatal crash on the runway. Mr. Giardino handled it gracefully and solemnly, as appropriate, while being a consummate professional. He was also very compassionate. He reached out to the family of the person who passed. Without being overly emotional, he addressed their needs with humanity. When the media and state police showed up to the airport, he effectively communicated the situation without showing any signs of pressure.

Mr. Giardino was very passionate about integrity and never acted outside of integrity. He always gave 110% which may have impacted his work life balance. However, he was committed to the success of the organization as well as the success of his family. On numerous occasions he sent emails in the middle of the night, which indicated that he was still at work.

Mr. Giardino was exceptional when it came to dealing with the public. As Executive Director, he was the go-to person for media interviews and was the face for special events at the airport. For events of any nature, he was in the crowd shaking hands or talking to passengers about their experiences. He also handled complaints from passengers if he noticed any issues.

Ms. O'Brien would hire Mr. Giardino and would work for him again. He was the best supervisor that she has ever worked for, and she was devastated when he left.

### Reference Notes Michael Giardino

### Words or phrases used to describe Michael Giardino:

- Effective communicator,
- Dedicated family man,
- Works well under pressure,
- Attentive,
- Empathetic,
- Strong willed, and
- A man of high integrity.

**Strengths:** Effective communicator, integrity, mentor, very customer service oriented.

Weaknesses: He cares about the people he works with more than the average supervisor would.

However, this does not hinder his job performance.

### Barrett Baker - Reporter, Peninsula Chronicle, VA (757) 551-9551

Mr. Baker has known Mr. Giardino since 2021. Mr. Giardino was Mr. Baker's point of contact for the Newport News Williamsburg International Airport. Mr. Baker was as honest as possible, while still putting the airport in the best light possible without sensationalizing the stories. In turn, Mr. Giardino was able to tell the airport's story so that it could be printed. He was very upfront about what was happening. They had a great working relationship.

To increase business, Mr. Giardino reached out to many other flight carriers, and he was very effective in his efforts because he has so many good connections within the media, the community, and the industry.

Mr. Giardino was very upbeat and positive. He always had an eye to the future, though he also understood that it takes time for new programs to gain traction. He remained very positive throughout the process. He was enjoyable to talk to because he was so very knowledgeable. He told the story as it was, without trying to feed you a line. He was great at his job.

A great communicator, Mr. Giardino was always available. When others at the airport were not responsive, he always was. He provided his direct line so that he was easy to reach, and always provided a full picture of what was happening.

Mr. Giardino was doing a great job at the airport, and it was shocking when the Board of Directors let him go. After his departure the Board let a number of other employees go as well. Mr. Baker tried to contact the Board Members to ask why they dismissed Mr. Giardino, but they were not responsive. They may have thought that the best way to address financial difficulties was to cut jobs, but it did not seem very effective.

### Reference Notes Michael Giardino

Mr. Giardino is a great person, and he will do a great job for any organization.

### Words or phrases used to describe Michael Giardino:

- Responsive,
- Honest,
- Great communicator,
- Positive,
- Upbeat, and
- Experienced.

**Strengths:** Good at his job, knowledgeable, good communicator.

Weaknesses: None identified.

### John Borden - Director, Newport News Williamsburg International Airport, VA (757) 234-2433

Mr. Borden reported to Mr. Giardino from 2017 to 2023. Mr. Giardino was a mentor to Mr. Borden. They spoke in person every day, Mr. Giardino believes in talking to people, rather than always using email, whether that be the staff, the Board, or members of the public.

Mr. Giardino is very optimistic and team oriented. He clearly communicates his intentions so there are no gray areas or misunderstandings. He maps out the vision and employees know exactly what must be done. He was an outstanding Executive Director.

Mr. Giardino was very professional and had good common sense. He did not change something just to change it. When something was working well, he left it alone. He was quick to resolve any issues that the organization had and even addressed problems that previous Directors ignored. He was very forward thinking.

Attending events that benefit the organization, Mr. Giardino was very visible in the community. He is a people person and is easy to talk to. He speaks straight from the heart and means everything that he says. He is the most honest person that Mr. Borden knows.

Mr. Giardino saved the airport as it was in drastic financial despair when he was hired. He immediately adjusted the airline rates and then cut unnecessary budget items, which was critical to their success during COVID. He can fix any issue that he encounters or is asked to address.

Everyone that Mr. Borden knows has a positive opinion of Mr. Giardino. He handles stress well because he is always prepared and has a great deal of experience. He is fairly even keeled, with

### Reference Notes Michael Giardino

slight hills and valleys, but nothing drastic. He will analyze a situation to learn what he could have done better, without berating staff or himself in the process.

Whoever hires Mr. Giardino will have the top of the heap. He works all hours of the day and night and is really dedicated. He jumps in headfirst and puts everything he has into his work.

### Words or phrases used to describe Michael Giardino:

- Optimistic,
- Very team oriented,
- Good communicator,
- Professional,
- Forward thinking, and
- Problem solver.

**Strengths:** Positive, mentor, communicates well, clearly outlines goals and objectives, great

problem solver.

Weaknesses: None identified.

**Prepared by:** Alissa Holmes

Colin Baenziger & Associates

# CB&A Internet Research

### Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

Daily Press (Newport News, VA) February 14, 2023

# Airport board fires executive director - Commissioners hope change will help bring in more commercial air service - Newport news

Author/Byline: Peter Dujardin

The board that oversees Newport News/Williamsburg Airport on Monday ousted the man who's been at the airport's helm for the past five years. The Peninsula Airport Commission voted 4-1 to terminate the employment of Airport Executive Director **Mike Giardino**, effective immediately.

Chairwoman Lindsey Carney Smith said commissioners hope to bring in more commercial air service at the struggling airport - and hope a change in leadership will help make that happen. "We really need to restore our commercial air service that we provide to our community to pre-COVID levels," Smith said. "And we feel like now's the time to make a change to try to get back to that successful delivery of service."

The Newport News/Williamsburg Airport - with only five outbound commercial flights per day has largely been squeezed out of the Southeastern Virginia air service market by larger airports in Norfolk and Richmond. Only two carriers - Avelo Airlines and American - now serve the airport. Though the airport expects to bring in more than 225,000 passengers this year with Avelo Airlines' new service to Florida, it's a far cry from traffic in years past. Flights from Newport News had already fallen drastically before the coronavirus pandemic, but it exacerbated the problem. Passenger traffic has fallen to about 166,000 passengers in the past fiscal year, down from more than 1 million in 2012.

When asked why **Giardino** was to blame for the reduced service, Smith said the change isn't about assigning blame but spurring growth. "By no means did we say it was his fault," she said. "And we appreciate the past five years of his service ... But as with anything else, a leadership change sometimes can facilitate different results." **Giardino** had no comment after the meeting, walking briskly across the lobby to his office. He walked out of the building a few minutes later, asking Deputy Director John Borden to accompany him out, **Giardino's** executive assistant said. Borden will lead the airport on an interim basis until a replacement is found.

**Giardino**, 60, was hired as executive director in October 2017. A retired Navy commander and helicopter pilot who once served as executive officer of Naval Air Station Key West, he served as a village manager in upstate New York before leading an airport in Rochester, New York, for five years. He was hired in Newport News at a \$165,000 salary, but his more recent salary - and any severance to be paid him - couldn't be immediately determined Monday.

The board's motion at Monday's special meeting said the executive's job duties include "meeting the performance standards established annually" by the (Peninsula Airport Commission), and that board members deem it to be in the airport's "best interest" to replace him. Voting to fire **Giardino** were commissioners Lindsey CarneSmith, Tommy Garner, Sharon Scott and Jennifer

### Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

Smith, while commissioner Jay Joseph voted not to terminate him. Another commissioner, Brian Kelly, abruptly resigned from the six-member board Jan. 30, and was said to be unhappy with the board's direction regarding **Giardino**. He couldn't be reached Monday afternoon.

Joseph and Smith declined to comment as they walked out of the meeting, saying they were leaving comments to Carney-Smith. Scott, the former Newport News city councilwoman, would say only that "we're just moving forward just to get some new leadership to make some positive changes at the airport."

Garner said he wants nothing for the best for **Giardino**, calling him a good person and "a great guy on a personal level. "But he said the board is "looking for growth, we're looking for development, and I just feel like it's time for a new person." "As far as the direction of the airport, I'd like to see the airport back to where we were years ago when AirTran was there," Garner said. "Maybe with some new fresh leadership, we may get there." AirTran used to run direct daily flights to New York, Boston, Atlanta and Florida and accounted for nearly half the airport's passengers. But AirTran pulled out in 2012 when Southwest Airlines bought the low-cost carrier and consolidated routes. **Giardino**'s hiring followed the ouster of former director Ken Spirito over the People Express fiasco. Spirito was convicted in federal court after a secret \$5 million loan guarantee to the startup airline.

Since he arrived in Newport News, **Giardino** has touted public transparency, freely talking about airport issues and generally sharing airport documents. On the day he was hired, he vowed "to aggressively address the community's air travel needs." But even as **Giardino** spent significant time and energy meeting with airlines and attending conferences to try to court new air service, the pandemic led to more setbacks as airlines cut back further on flights.

In April 2020, **Giardino** and a contingent of Peninsula officials sounded the alarm about the federal interpretation of the pandemic stimulus bill, which he predicted would allow carriers such as Delta Air Lines and American to consolidate service in Norfolk rather than being obligated to continue serving both airports. A month later, Delta "temporarily" left Newport News in May 2020, never to return. American Airlines significantly cut back on flights.

The airport also derives significant revenue from general aviation traffic and hangar rentals, as people fly and charter smaller private planes. But the reduced passenger traffic has led to far lower revenue from airlines, parking fees and car rentals. In the year that ended last July, the airport took in \$5.4 million in operating revenue but paid \$8 million in expenses, for an operating loss of \$2.6 million, budget numbers show. **Giardino** has made up the shortfall with federal grants.

### Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

Daily Press (Newport News, VA) November 9, 2022

Nearly all residents vacated trailer park - Airport doesn't expect court action for removal Author/Byline: Peter Dujardin

The trailer park at Newport News/Williamsburg International Airport is nearly empty after the weekend deadline for tenants to vacate the property. Only three residents remain. Josiah Gayle - who has lived in the park for 35 years - was still residing at the parkMonday in his trailer on the park's outer edge. Though all tenants were supposed to leave by midnight Saturday, the airport gave Gayle, 65, who suffers from significant health issues, an extra week. "He needs a little more help," Airport Executive Director **Mike Giardino** said. "We're trying to be compassionate toward people, especially when they've got special circumstances."

But for most, Saturday marked the final exodus from the Patrick Henry Mobile Home Park. The Peninsula Airport Commission, which owns the property, announced the park's closure in May and has been pushing to get tenants off the property ever since, including offering stipends to entice tenants to leave early. The process has been heart-wrenching for many who have been unable to move their aging trailers out of the park and struggled to find new housing.

**Giardino** said the United Way has arranged for housing for Gayle, and he's "finally accepted that help." But the new home won't be ready until next week. Still, Gayle said he's unhappy about having to move from his home of more than three decades. "I'm homeless," he said tersely. "They took everything I got."

Only one other trailer is still occupied - a couple was planning to have their trailer moved, but learned at the last minute that it couldn't be. The airport gave them a few more days to find something else, **Giardino** said. "They're nice people, and they've always been great tenants," he said. "Their circumstances changed at the last minute, and we want to help them." But everyone else is gone, **Giardino** said, and the airport doesn't expect to have to take anyone to court to force them out. Many tenants - even those who stayed until the end - have gotten \$4,000 to move, he said. That includes \$2,000 for their trailer title and \$2,000 to actually vacate. That was on top of free rent and water for six months between May 5 and Nov. 5.

On the other hand, the overwhelming majority of tenants lost trailers they owned outright, plus any money they pumped into the homes over the years. Some residents told the Daily Press they invested tens of thousands of dollars into rehabbing their properties.

It's a relief, **Giardino** said, that "the process that needed to take place" is now reaching a conclusion. "But there's a human aspect to it," he said. "And I think we did the best we could under the circumstances. It was about compassion and humanity while doing the right thing from the legal perspective." The 75-acre park has been around since at least the 1950s. Tenants owned the trailers, paying \$461 a month in recent years for the lot fee, water and trash. The 77 trailers on site in May was down from just under 100 homes on the site three years ago. There were

### Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

some 250 mobile homes on the property in its 1995 heyday. **Giardino** deemed the closure necessary, saying the airport couldn't afford to upgrade the park's aging infrastructure after years of neglect. The financially struggling airport, he said, could no longer afford to keep up with the Band-Aid fixes increasingly needed. He said it would cost millions to make needed improvements to water lines and stormwater drainage systems.

While a handful of trailers have been successfully moved out, **Giardino** said the airport will have the remaining trailers destroyed. If there's scrap metal that can be salvaged, he said, the airport will go through the proper government protocol for that. For cars and anything else that's left, he said, "it's abandoned property, and we'll dispose of it properly." As for the many stray cats still left at the park, **Giardino** said that issue will be addressed just like the other felines found living elsewhere at the airport. "They will all be dealt with humanely," he said.

Manny Aguilar, 29, was at the park on Monday morning with his wife, Melanie, and two of his boys - aged 2 and 4 - getting some last items out. That included a white utility van that doesn't run and sat dormant for months. Aguilar attached some chains to it, with the couple then using their large GMC pickup to yank it out of its resting spot. Over the weekend, Aguilar spray painted "PHTP 4 Life" in large black lettering on his trailer. That stands for "Patrick Henry Trailer Park for Life," he said. That's in honor of what the park has meant to him and his family. He grew up in the park, living there since he was 10 after his parents moved here from Mexico, and his parents still lived there a couple trailers down.

The Aguilars are moving into a condo, paying nearly four times the airport's monthly trailer fees. But Aguilar said he's "sad as a dad" that he no longer owns his family's home. Two of his neighbors, he said, destroyed their own trailers over the weekend. They had rented a forklift to move some sheds, and used the machine to tear down their trailers too. "They didn't want to give the airport the pleasure of doing it," Aguilar said.

### Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

Richmond Times-Dispatch (VA) October 7, 2022

Plane crash at airport in Newport News kills 1, seriously injures 2 - One person dies in small plane crash at Newport News airport, two others suffer life-threatening injuries Author/Byline: Jane Harper

One person died and two others were seriously injured Thursday after a small plane crashed at the Newport News-Williamsburg International Airport, according to state police. The three were onboard a Cessna 172 private plane when it crashed into the woods upon takeoff, said **Michael Giardino**, executive director of the airport. The two who were injured were taken to Riverside Regional Hospital, ...

The three were onboard a Cessna 172 private plane when it crashed into the woods upon takeoff, said **Michael Giardino**, executive director of the airport. The two who were injured were taken to Riverside Regional Hospital, according to a news release from state police. Both were said to have life-threatening injuries.

The Cessna 172 Skyhawk is a four-seat, single-engine plane. An active fuel leak was discovered at the scene and was contained, **Giardino** said. The crash was reported at 3:22 p.m. on the north side of the airport. The facility was closed for nearly two hours afterward. Airport Rescue responded to the crash, as well as Newport News firefighters and police. Virginia State Police are handling the initial investigation, and the National Transportation and Safety Board has been notified, **Giardino** said.

The plane that crashed is based out of the Newport News-Williamsburg airport. **Giardino** said he didn't know where it was headed or who was on it. State police said they were working to notify the families of the victims.

### Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

Virginian-Pilot, The (Norfolk, VA) August 1, 2022

### Newport News to see new Florida routes starting at \$29

Author/Byline: Trevor Metcalfe

Travelers at the Newport News/Williamsburg International Airport will soon be able to experience the Sunshine State for as low as \$29 for a one-way flight. Avelo Airlines, a Houston-based discount carrier, said it will begin offering flights to Orlando and Fort Lauderdale, Florida, this fall. The airline plans to start offering Orlando service Oct. 19 and Fort Lauderdale Oct. 20. "We are thrilled that Avelo Airlines is adding Newport News to the list of destinations they serve," Newport News Mayor McKinley Price said in a July 26 announcement. In addition to offering affordable options for Hampton Roads residents, he said the flights will help showcase the convenience of the Peninsula's airport.

Introductory one-way flights will begin at \$29 for Orlando and \$49 for Fort Lauderdale. After the inaugural Oct. 19 flight, both Orlando and Fort Lauderdale flights will run Thursdays and Sundays from Oct. 20 to Nov. 9 and on Tuesdays, Thursdays and Sundays starting Nov. 10. Avelo Airlines Chairman and CEO Andrew Levy said airline leaders chose Newport News for its central location between Richmond and South Hampton Roads. He said the airline usually enters markets where there is no similar service available. "We're really excited to bring some new options to people who live in the region," Levy said.

Levy said the strategy is similar to one he used while at Allegiant Air, which also serves smaller destinations with fewer direct flights. Avelo sells several add-ons to supplement ticket revenue, including fees for both carry-on and checked baggage, extra legroom and food service. If the two initial routes are successful, Levy said airline leaders will explore adding flights to other Florida locations like Tampa Bay, West Palm Beach, Fort Myers and Sarasota.

Peninsula passengers will enjoy the new services because it means they won't have to trek across the bridges and tunnels to neighboring airports, where traffic delays can make travel days even longer, said **Michael Giardino**, Newport News/Williamsburg airport executive director. "These flights fulfill what we already know is high demand for great air service in our region," **Giardino** said.

The airport had lost business while competing with the Norfolk and Richmond airports because of COVID-19 issues and airline consolidations, **Giardino** told a panel last year. Norfolk attracted low-cost carrier Breeze Airways in June 2021 that now offers flights to Florida destinations and other locations like Los Angeles, Las Vegas and Charleston, South Carolina. Still, the Peninsula airport landed a \$15 million expansion project in September from Newport News aerospace company Aery Aviation, which will create a new 60,000-square-foot hangar and engineering facility.

### Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

Virginian-Pilot, The (Norfolk, VA) July 11, 2022

Local airports avoiding summer chaos - Staffing shortages have hit rest of industry hard Author/Byline: Sandra J. Pennecke

Hampton Roads airports are working to accommodate industry challenges, but the region isn't experiencing the long lines, staffing shortages and delayed and canceled flights that other cities are experiencing, airport leaders said. Norfolk International Airport has been busier but wellstaffed, and both vendors and the Transportation Security Administration were prepared for Fourth of July demand, said Charlie Braden, director of market development at Norfolk Airport Authority. "With regards to cancellations and delays, we're really sort of at the whim of the airlines," Braden said. So far this summer, Braden said the Norfolk airport is experiencing a 10% reduction in departures compared with the summer of 2019 along with an 11% increase in seats. And 2019 was the airport's highest passenger growth year on record, Braden noted. "This dichotomy of less departures but more seats happens when the airlines use fewer but larger aircraft," Braden said. "Using fewer aircraft helps with the airline staffing issues, while using larger aircraft helps to serve high passenger demand." Part of the growth, Braden pointed out, is the entrance of Breeze Airways into the Norfolk market. Norfolk International Airport has seven airlines that fly nonstop to 40 different destinations. To rectify the staffing shortages, the industry is accelerating the pipeline to get pilots certified to fly, he said. "They didn't anticipate the faster demand to be this high after the pandemic," he said. Norfolk International has between 80 to 90 departures daily. Braden noted the airport only had three cancellations, all to the Newark airport in New Jersey, on a recent weekday. When cancellations occur, Braden said airlines try to notify passengers well in advance and accommodate them on later flights. The airport terminals are open 24 hours a day with food, beverage and retail vendors, he said. "We're doing our best to make sure the experience turns out well for travelers," Braden said.

Newport News/Williamsburg International Airport is operating 35-40% below pre-pandemic numbers, said **Mike Giardino**, executive director for the Peninsula Airport Commission. That stems from Delta Air Lines consolidating and dropping its service to the airport in May 2020. American Airlines is the only carrier flying in and out of Newport News to and from one destination - Charlotte, North Carolina. "We're down to four to six Charlotte flights per day," **Giardino** said. Affected by the pandemic, federal regulations, fuel prices and pilot shortages, **Giardino** said it's been a rough go, but the Peninsula airport is still recruiting air service.

While its workforce is 60% of what it was in 2019, **Giardino** said the airport is appropriately staffed to handle the current traffic flow. "We own the realm of speed at our airport; we can get you from the parking lot into the airplane much faster than any other airport in the area," he said. For travelers faced with cancellations, **Giardino** said airlines have paid for transportation to Richmond and Norfolk International Airport if that is the only option. "The building is open 24/7 - worst case, if folks have no other option than to wait," **Giardino** said. "We try to give passengers the best experience we can here."

#### Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

Virginian-Pilot, The (Norfolk, VA) August 2, 2021

Newport News airport is getting closer to having flights to D.C.

Author/Byline: Dave Ress

Newport News' airportgot a big boost in its yearslong effort to get flights to Washington Dulles International Airport to connectto a third major international gateway. Newport News/Williamsburg International Airport already connects to the gateways of Charlotte and Philadelphia, but has been working to establish flight service to Dulles airport for more than three years. And it's getting closer to that goal, having won a \$847,646 U.S. Department of Transportation grant to support service to Dulles for up to two years.

Local governments have pledged a total of\$600,000 for the effort and the airport itself will spend \$150,000 onmarketing. The airport will also waive various fees normally charged to airlines for up to two years, amounting to another \$400,000 of support.

United Airlines wrote in support of the airport's request for the grant. While the grant doesn't mean United is definitely coming, the airline's support, which comes after many years of discussions, makes it more likely than not. "Now, it's time to talk to them about the how and when," airport executive director **Michael Giardino** said. He said the odd amount of the grant is based on airport staff calculations of the financial support needed for twice daily service, with 50-seat planes.

The pursuit of service to Dulles marks a major shift in the airport's business strategy, away from chasing discount airlines operating large planes to connections, even with smaller regional jets, to hub airports. "Air service in small communities is critical to the vitality of the local economy and non-stop service to Washington, D.C. (IAD) would be an important addition for the entire region," United's director for domestic network planning, Mark Weithofer, wrote the DOT. That has been especially true because the pandemic has cut air travel options for the Peninsula sharply, with a loss of nearly 70% of pre-COVID seats, Weithofer said.

**Giardino**, however, said Newport has been bouncing back somewhat. Traffic had been down to 25% to 30% of 2019 levels during most of the pandemic, but has been running at about 50% in the late spring and so far this summer, even with fewer flights and one less airline. He said American Airlines, with five daily flights to Charlotte and two to Philadelphia has been selling up to 90% of available seats and that its Newport News business is profitable.

The DOT grant for the Dulles service can be used to make up any losses United might see in a Newport News service, as would the local funds. About \$100,000 of the grant can be used for marketing. The grant comes from the same Small Community Air Service Development Program that the former members of the airport commission and executive director used to support the short-lived People Express service in 2014. But some of those funds inappropriately went to pay off a loan to People Express from TowneBank, along with a much larger grant from the state

#### Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

aviation department. That eventually led to the dismissal of then-executive director Ken Spirito and the resignation of Newport News City Manager Jim Bourey. Spirito has since been convicted of misuse of federal monies.

The airport's request for funds was backed by Representatives Rob Wittman, R-Westmoreland, Elaine Luria, D-Norfolk, and Robert C. Scott, D-Newport News, as well as Senators Mark Warner and Tim Kaine. Local government officials on the Peninsula also wrote in support. "That's what DOT likes to see - community support," **Giardino** said.

#### Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

Daily Press (Newport News, VA) November 14, 2020

#### Peninsula - Soldiers - waiting - at airport - a Peninsula tradition

Author/Byline: Dave Ress

It's a Peninsula tradition - several hundred soldiers camping out, sometimes for days, at the Newport News airport, waiting for a flight home for the holidays - and it's got people around the facility worried. "I'm concerned there won't be enough flights," said Diane Fry, director of the USO office at Newport News/Williamsburg International Airport, as she pauses to talk about how volunteers traditionally pitch in with meals, treats, entertainment and visits for soldiers as they wait. **Mike Giardino**, the airport's executive director, is even blunter: "We just don't have enough seats," he said.

Block leave at the holidays eases up the usual limitations on how many service members can be on leave at any one time - it's a recognition that young people, some of whom are far from family and friends, really need the time off. **Giardino** remembers that from his Navy career - as well as some his own 20-plus-hour nonstop highway marathons back in the day. "I was 22, I wanted to get home for Christmas and I was for sure gonna get home for Christmas," he said. And **Giardino**, the one-time commander of a 250-sailor aviation maintenance department at Naval Station Norfolk, remembering the holiday season lectures about safe driving that his senior chief used to insist on, worries that not enough flights means too many soldiers hitting the road for their own version of an overlong drive home.

For years, the airport has tried to help out by opening up its usually shuttered B concourse to host the soldiers and working closely with USO and community volunteers to make the wait for flights as painless as possible. Soldiers arrive in busloads - the first lot, often at 1 a.m., more than a week before Christmas. There's a regular bus shuttle back to Fort Eustis as they return to Newport News after New Year's Day. But with 500 to 800 soldiers flying, some inevitably end up waiting - "then there's always the ones who were sleeping when their flight was announced and we have to find another for them," the USO's Fry said. "We'll bring in Santa, people will come with candy - I've seen soldiers lining up at 4 a.m., just like kids, when they come around," said Fry.

She and **Giardino** think social distancing in the terminal, and the airlines' firm rules about masks and in-flight ventilation make flying a safer alternative to driving. But the pandemic has hammered airlines, and at the Newport News airport that's translated to a drop in service - from the seven daily flights American Airlines used to fly to Charlotte, and three to Philadelphia, the carrier is now averaging a bit more than three daily flights to the North Carolina airport. Delta, which had offered three daily flights to Atlanta, stopped flying that route in the spring. "They've had to furlough people, cut services ... they're bleeding cash," he said. The airport isn't. Major belt-tightening as it cleaned house after the previous board and management secretly spent \$5 million of public funds to try to get the short-lived People Express Airlines launched means the airport currently has little debt. Its annual interest cost is \$292,000, nothing like the millions of

#### Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

dollars a year in interest other airports pay. **Giardino** is hoping the airport's board of commissioners will agree with him that offering airlines a temporary break on terminal rents and landing fees - he calls it a kind of thank-you gesture - might help get some more flights. "We're in a position of strength and we want to help our partners who are not ... we want to help our community," he said. He's thinking of that as a way to remind American and Delta that there's a lot of business to be done in Newport News.

It's not just the block leave either - in fact, unlike some airports, Newport News normally has relatively steady traffic because some 70% of people flying to and from the Peninsula are business travelers. That's a high proportion. And most are connected with the military or with the defense contractors who serve the military, and the travel they do isn't ordinarily for the sort of mission that a video conference call can manage. That, along with the airport's relatively low fees and the financial muscle to offer incentives, was part of the pitch that the airport's marketing director, Jenifer Spratley, was making last week at the TakeOff North America air service forum in Denver.

At the forum's traditional "speed dating" session - when airports make the rounds of airlines to try to sell themselves - Spratley also pointed out that the expansion of the Hampton Roads Bridge Tunnel and Interstate 64 is going to make it even more difficult for Peninsula travelers to get to other airports. It's been a familiar line at recent air service forums - but this time, unlike in recent years, she got more than the usual "that's nice." Four of the seven airlines she pitched asked her to come back with more information. And, she added, the kind of rent and fee waiver **Giardino** is mulling may not cost much, but "is exactly the kind of gesture airlines remember."

#### Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

Daily Press (Newport News, VA) May 19, 2020

# Operating hours slashed for airport's control tower - Cuts made to Newport News/Williamsburg International amid reductions in air traffic

Author/Byline: Peter Dujardin

The Federal Aviation Administration has sharply cut back on the operating hours for the control tower at the Newport News/Williamsburg International Airport, which is seeing drastically reduced air traffic as a result of the coronavirus. The control tower is now scheduled to be open only eight hours a day - from 8 a.m. to 4 p.m. That's down from the previous 17 hours a day - from 6 a.m. to 11 p.m.

The FAA said Newport News is one of about 100 airports nationwide to see the cutbacks in tower operations. "These facilities have seen a significant reduction in flights, especially during the evening and nighttime hours, since the pandemic began," the agency said in a statement. The cutbacks will "protect our employees" from exposure to the virus, the FAA said, adding that there will be enough manpower in the towers to "maintain safe and efficient operations" while also "minimizing health risks to our workforce."

The upcoming schedule for American Airlines - soon to be the only commercial carrier serving Newport News - shows that most of its takeoffs and landings in Newport News will take place when the airport's control tower is closed. American's flight schedule shows that of the six flights in and out of the airport in June, four of them are outside of the tower's new operating hours - outbound flights at 7 a.m. and 5:57 p.m., and inbound flights at 5:27 p.m. and 9:42 p.m.

But Newport News airport officials say that because pilots don't need air traffic controllers to fly or move planes on the ground, the FAA's decision won't affect the ability of planes to fly in and out of the airport. "This has zero - zero - impact," Executive Director **Mike Giardino** said. "There are airports all over the country that have commercial service but no air traffic control towers." There are very rare circumstances - such as certain kinds of stormy weather - in which air traffic controllers can improve safety, he said. "But those times are so infrequent," he said, that they are barely worth mentioning. "We don't operate unsafely," **Giardino** said. "Safety is built into aviation. We had operations without a control tower before COVID, and we will afterwards. The airport is open and will remain open. This is just the FAA managing its resources."

Airport spokeswoman Jenifer Spratley added that of the country's 20,000 airports, only 500 have air traffic control towers. And of the ones with towers, she said, many of the towers aren't operating 24/7. The FAA likewise asserted that tower cutbacks "will not have operational effects" at the 100 airports seeing the tower cutbacks. The agency said it examined hourly aircraft counts, flights on commercial airlines and other factors in making its decisions. The changes, the FAA said, "are not intended to be made permanent." "As operational traffic counts" and other factors change, the FAA will "make appropriate adjustments," the agency said. Of the

#### Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

100 airports seeing cuts, only one other is in Virginia: The Manassas Regional Airport. Before the pandemic, Delta Air Lines had been flying three times a day from Newport News to Atlanta with connections from there to other destinations. That was cut back in April, and 10 days ago the airline announced it's leaving Newport News for now, consolidating local flights in Norfolk on a temporary basis. American had been flying seven times a day to Charlotte and three to Philadelphia before the pandemic. It's now flying three times daily to Charlotte and plans to stop flying to Philadelphia in June. That leaves six takeoffs or landings in Newport News on the Charlotte flights - four of which will be while the control tower is closed.

Spratley said pilots must follow standard FAA regulations - such as basic right-of-way rules - without traffic controllers. "As part of every pilot's training ... they learn how to safely operate their aircraft at an airport without an operating control tower," Spratley wrote.

Jack Sheehan, a private pilot who has flown in and out of the Newport News airport for about 30 years, says general aviation pilots are OK with the tower's hours being cut. "We are used to flying to airports that don't have towers," he said. Air traffic in Newport News, Sheehan said, "is not anywhere like it used to be." The FAA's air traffic control system, he said, includes an "approach control center" in Norfolk that's separate from each airport's control tower. The "approach control" employees communicate with many pilots by radar, clearing them for landing at Norfolk, Newport News and other airports from several miles away.

The airport control towers then take over the communication. When a tower is closed, Sheehan said, the pilots communicate with each other on a common radio frequency. "It's self-controlled," he said. "We call it 'calling in the blind.' You are announcing where you are to all traffic in the area. You announce your identification - such as 'this is Cessna 1234 - and your intentions, what you're going to do. You may be landing, flying overhead, practicing an approach."

"You might say, 'We're gonna land on runway 7,' and you give warnings all the way down so people who are flying know where the other planes are," Sheehan said. The control tower, he said, also handles "ground control" - the movement on the tarmacs, taxiways and runways - as well as calls for rescue service if there's a mishap on the ground. When a tower is closed, he said, the pilots will communicate with each other about ground movements, too. "That works pretty well in places that are not very crowded," Sheehan said.

**Giardino** said protocols are in place for the airport's Fire Department to monitor the airport after hours for mishaps and need for rescue service.

#### Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

Virginian-Pilot, The (Norfolk, VA) May 2, 2020

# Drastic cuts at Newport News airport - \$398,000 lost in April; 36 employees laid off because of coronavirus fallout

Author/Byline: Peter Dujardin

Reeling from drastically reduced air travel caused by the coronavirus, the Newport News/Williamsburg International Airport is slashing its budget and cutting workers to make ends meet. Thirty-six airport employees - 29 part-time and seven full-time - have been let go, including several in upper management ranks. Assistant Executive Director Melissa Cheaney and Director of Finance and Administration Renee Carr are among those who have lost their jobs. Both have worked at the airport for more than 10 years, but were conspicuous by their absence at an electronic Peninsula Airport Commission on Thursday.

"We're under fiscal distress right now," Executive Director **Mike Giardino** said in an interview this week. "There's absolutely no doubt about it. We're bleeding cash like every other organization." The airport lost \$398,000 in April, he said, and was on an "unsustainable" track to lose \$1 million in operations by June 30. "The results of this pandemic have been catastrophic," he said. No matter how you slice the numbers, "We need to run a very lean airport for a sustained period of time."

The job cuts leave the airport with 52 employees, nine of whom are part-time. That's down from 88 employees - 50 full time and 38 part time - less than two months ago. The layoffs also included the airport's director of business development, Viveca Munger, and its director of strategic initiatives and government relations, Kevin Knapp, as well as a restaurant manager, civilian public safety worker and receptionist. The 29 part-timers who were let go include parking lot attendants, shuttle bus drivers, custodians, restaurant employees and a firefighter trainee. "This was a budget decision only" and the result of "the emergency situation that we're under," **Giardino** said. "COVID-19 did this." "It's a very difficult situation because it has to do with individuals," he said. "Thirty-six people are no longer working at the airport. All with important roles. All have skills that added value to the airport ... All 36 deserve respect and our thanks for their dedicated service." The cuts don't count employees of airlines and car rental companies at the airport who also lost their jobs. Cheaney and Carr did not return phone calls left for them Tuesday.

In early March, with lots of packed flights last year and into this year, the airport was \$750,000 in the black on its \$8.7 million annual budget, which ends June 30. "We were having a great fiscal year," **Giardino** said, saying the airport was "on the cusp of getting even better" with good prospects for new flights. But now, passenger traffic on the airport's two airlines - Delta Air Lines and American Airlines - only number a few dozen people a day, down from upwards of 600 daily at this time last year. The low point came April 21, when the airport had only eight outbound passengers. The sharp reduction translates into far less money coming to the airport from parking fees, car rental revenue, and plane landing fees - all among the airport's biggest

#### Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

money generators. "I'm running a completely different organization than the one I ran two months ago," **Giardino** said. He told board members he's cutting the airport's proposed budget for the year that begins July 1 to \$5.8 million - down 32% from this year. "Irrevocable damage could occur if we did not contemplate these kinds of measures," **Giardino** told the six-member board of the cost cutting. With the job cuts, he's reduced pay and benefits by 35% - or \$1.7 million lower than the current budget. Airport finance manager Jessica Minor told the board that the airport has also budgeted less money for supplies - in part because of a closed restaurant and lower cleaning needs - and is looking to save on utility bills, grass cutting and carpet cleaning. "We're putting all optional repairs on hold for now," she said.

The slashing is coming despite the fact that the airport got a \$4.1 million grant from the federal stimulus package a few weeks ago. Though that grant amounts to nearly half the airport's current annual operating budget, Giardino said it won't last long without significant cuts. Without sharp budget reductions, he said, the airport could expect significant monthly losses going out many months. "How fast we burn into the grant," Giardino said, will depend on how big those monthly losses are. If they're \$300,000 a month, for example, the grant would be used up far more quickly than if the losses are half that size. Airport commission Chairwoman Sharon Scott asked Giardino at Thursday's meeting for further details on the job cuts. "We appreciate all the sacrifices that everyone is making - and even the ones who were terminated, furloughed or otherwise not at the airport anymore," she said. "We would like some details on how that's being handled, just to make sure that we are in compliance with labor laws that everyone's departure is handled properly." Airport board member Jay Joseph added that he and Commissioner George Wallace, who didn't attend the electronic meeting, wanted to know the airport's terms with the departing workers. "What types of discussions were had about future employment prospects, and was there any consideration about benefits, specifically health insurance going forward?" Joseph asked.

Giardino said he was recommending that the board provide health benefits at least partially into the fiscal year that begins in July. "We are extending benefits to those who are eligible for as long as we can," he told the Daily Press later. Giardino said he can't speak to the opportunities for "future employment" to bring the workers back, because "it's a much different environment than where we were running," and it's not clear when things will pick up again. The airport will be "lucky," he said, if this year's traffic is half that of 2019. An 80% recovery is "a long way off." It took nearly three years, he said, for air traffic to come back after Sept. 11, 2001. Giardino also cautioned that the same stimulus package that gave the airport \$4.1 million also contains a provision that allows Delta and American to abandon Newport News and consolidate local flights in Norfolk. The airport likely hasn't hit bottom yet, Giardino said, so he didn't want to "offer false hope to anyone." "The numbers for the rest of this fiscal year will be horrible," he said. "There would be no excuse on the planet to continue bleeding cash, as tragic as it is. And it is tragic. It's terrible." But, Giardino added, there's a path forward. "I took bold, swift action to ensure we have a tomorrow," he said.

#### Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

Daily Press (Newport News, VA) April 9, 2020

Airport fears end of service - Stimulus could mean diminished funding for Newport News Author/Byline: Peter Dujardin

The Newport News/Williamsburg International Airport is sounding the alarm. The economic chaos sown by the new coronavirus - and the federal stimulus law designed to alleviate that chaos - could lead to the end of commercial air service at the airport, local officials fear. On the surface, the stimulus bill, signed into law by President Trump almost two weeks ago, requires airlines to promise to keep flying out of markets they already serve to be eligible for billions of dollars in bailout money. But in an order Tuesday, the U.S. Department of Transportation interpreted that provision to mean that airlines serving Hampton Roads need to fly out of only one of the region's two commercial airports in order to comply. Delta Air Lines and American Airlines - the two remaining carriers serving Newport News - have not announced plans to consolidate operations at the larger Norfolk International Airport, where both already have service. But the possibility that they could do so is alarming airport and government officials on the Peninsula.

York County Board of Supervisors Chairman Chad Green said he was highly concerned. "On a scale of one to 10, I consider it an 11," he said of his level of worry. "If they leave, we might never get commercial air service back." "The airport is on the right track, and I would hate to see it lose service," Green said. "People who don't live here or haven't been here don't understand the different communities - the bodies of water and the community boundaries. If they kill air service out of Newport News, this could have a definitive negative effect on the public and all of the businesses around here." Given that airports are considered national assets, there's little chance the Newport News airport would ever be closed for a lack of commercial flights. But air carriers leaving the Peninsula, even temporarily, could significantly harm the airport and its crucial revenue streams - from parking fees to car rentals to plane landing fees. The airport's other revenue streams - such as general aviation flights, military warfare training companies and an on-site trailer park - won't pay the bills, Green said. "That won't keep the lights on on the runways," he said.

"We were blindsided," Newport News Airport Executive Director **Mike Giardino** said of learning last week of the DOT's interpretation of the stimulus bill. He immediately called on city and county leaders to drum up support, telling them in bold lettering: "We need your help." He also got in touch with U.S. Sens. Mark Warner and Tim Kaine, U.S. Reps. Bobby Scott, Elaine Luria and Rob Wittman, and state officials.

While Delta and American "have given us no indication that they are leaving," **Giardino** said, the possibility is highly concerning. "If you're the airline and you have the ability to consolidate your service in one location when you're bleeding money, you might do it," he said. "They're in dire straits ... and this could incentivize them to consolidate in Norfolk." **Giardino** asserted that Congress did not envision that airlines could get federal money and then stop serving particular

#### Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

airports. "I don't think (the lawmakers) contemplated this," he said. "The fact that airlines can choose to do this at all was not the intent of the legislation. The intent was to keep the airlines whole while they maintained some level of service." One paragraph in the \$2 trillion stimulus bill, also known as the CARES Act, was designed to protect air service to smaller communities. That paragraph said the Transportation Department is to require "to the extent reasonable and practicable" that airlines getting the money continue serving "any point" in the country they were serving before April 1. The law added that the agency "shall take into consideration the air transportation needs of small and remote communities." But the rub is the phrase "any point." Lawmakers didn't define that term, and the Transportation Department used Bureau of Transportation Statistics to determine the locations.

When the DOT's proposed order last week defined Norfolk and Newport News as serving the same point - meaning only one of the airports need be served - government officials from the Peninsula voiced objections. "It has been brought to our attention that our airport is being excluded from the provisions of the CARES Act because of our seeming proximity to Norfolk," Green wrote to the DOT on April 2. Traffic issues in the region, he said, are a huge issue that make two airports crucial. "Our connectivity and economic prosperity is dependent upon our citizens and visitors being able to transverse major waterways that include numerous bridges and tunnels," Green wrote in the letter. "It is not uncommon for any one or more of the bridges or tunnels to be obstructed or closed due to accidents or other traffic related issues resulting in extended delays." The Peninsula, Green wrote, is home to Newport News Shipbuilding, the Jefferson Labs, NASA Langley, Fort Eustis, Langley Air Force base and the Yorktown Naval Weapons Station. "The elimination of commercial air service at our local airport, which provides the quickest and best option, will impact their operations," he said. Such a change would have a large impact on the Peninsula economically, he said, meaning the stimulus bill will "not only fail to provide relief," but "will instead compound the impact of the recession." "We strongly believe even a temporary loss of air service at (the Newport News airport) would have a negative, longterm impact on our business and regional economy - exactly what the Department and Federal government are trying to alleviate," Green wrote.

Identical letters were then submitted by Newport News City Manager Cynthia Rohlf, Hampton City Manager Mary Bunting, Williamsburg City Manager Andrew Trivette and Poquoson Mayor W. Eugene Hunt Jr. Bob McKenna, the president and CEO of the Virginia Peninsula Chamber of Commerce, agreed that it would hurt the local economy if the airlines pulled out of Newport News. "And selfishly speaking, I live in Newport News and like being able to drive 10 or 15 minutes to the airport, park and be at the gate in five minutes," he said. "It's a well-run and well-equipped airport, and it's a great asset to have that airport here." But airlines also wrote to the DOT last week, saying they liked the flexibility afforded by the proposed rules. "Delta strongly supports the (Department of Transportation's) proposals to give each carrier maximum flexibility to meet its domestic service obligations by ... serving any airport or combination of airports that provide reasonable access to the communities the carrier serves," the airline wrote. The DOT's proposal, Delta said, "reflect sensible, balanced approaches" that will provide "minimum air transportation access for all Americans during this emergency while recognizing the economic reality that carriers must still attempt to match capacity to demand." The DOT issued its final

#### Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

order Tuesday, siding with the airlines. "The ability of carriers to consolidate operations at a single airport serving a point is an important flexibility that furthers the objectives of the CARES Act," the order said. "Requiring carriers to continue service to multiple airports serving a single point would impose undue costs on covered carriers." The agency added, however, that "nothing in this order prevents carriers from serving multiple airports at a given point, if they so choose." The Newport News airport is the only airport in Virginia affected by the DOT's order. Commercial airports in Roanoke, Lynchburg, Charlottesville and the Shenandoah Valley - most of them smaller than Newport News - are not in the footprint of a larger airport and as such are their own "points." But a handful of other airports around the country are in the same boat. The Akron-Canton Airport in Ohio, for example, is in the same "point" as a larger airport in Cleveland, the DOT ruled. The T.F. Green Airport outside of Providence, Rhode Island, falls into the same zone as Boston's Logan International Airport. On Wednesday, JetBlue announced that it's consolidating its Providence flights with Boston for eight weeks, the Providence Journal reported. American Airlines said Tuesday that it "continues to serve" both Newport News and Norfolk. When asked if that would continue in the months ahead, American spokesman Ross Feinstein wrote in an email: "Due to decreased customer demand, we have made several changes to our schedule in this rapidly changing environment. At this time, none of those changes include ending service to Newport News/Williamsburg International Airport."

A Delta Air Lines spokeswoman, Kyla T. Ross, on the other hand, released a far shorter statement: "We're reviewing the final DOT order and have no plans to share at this time." With planes flying only about 10% full these days, both airlines have already cut back service to Newport News, as airlines have to other destinations around the country. Delta had been flying three times a day to Atlanta - with connections from there to other destinations - but has cut that back to one a day, Giardino said.

American, for its part, was flying 7 flights a day to Charlotte and three to Philadelphia. But under a new schedule released this week, American now flies three times a day to Charlotte and five flights a week - less than once a day - to Philly. "On Monday we had 28 passengers - 28," **Giardino** said of the Newport News airport. "Normally this time of year, the week before Easter, we'd have 600 passengers a day." It's in the airlines' best interest to continue flying out of Newport News, he asserted. Before the coronavirus struck, **Giardino** said, "our load factor was extremely high" - meaning that planes were often packed. "When everything is normal, we have very good cost structure for airlines," he said. "We're a good value for the airline when things are going well ... So if they leave, the airlines would be walking away from a model where they are actually making more money per trip" than at other airports. **Giardino** - who has spent the better part of two years trying to bring new carriers and flights to Newport News - said he's going to work hard to keep American and Delta here. "My mandate is to maintain service and grow service," he vowed. "My job is to keep the airport going, and that's what I'm going to do."

#### Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

Daily Press (Newport News, VA) March 9, 2020

# Aviation academy to get new home - Critical maintenance issues at heart of move from airport to Denbigh High

Author/Byline: Matt Jones

You can tell it used to be an airport terminal when you walk around the Denbigh High School Aviation Academy. Tall windows look out onto the tarmac at Newport News/Williamsburg International Airport. The gate is now the academy's cafeteria. A wind tunnel fills the room where baggage handlers once unloaded luggage. But you can tell it used to be an airport terminal in the 1950s. The heating and cooling system is failing. The roof leaks.

This summer, Newport News Public Schools plans to move the academy to a wing of Denbigh High School. Administrators say the division can't afford to take on the upkeep the building needs. The airport says it can't, either. "The building just quietly and deliberately told us it can't sustain anymore," said Michael Giardino, airport executive director.

The academy, which started in 1995, enrolls about 275 students who shuttle back and forth from Denbigh High School. The hands-on program focuses on piloting, aircraft maintenance, engineering and public safety. It's open to students throughout the division, and program administrator Aaron Smith says a lot of its students don't fit into traditional magnet programs. "Learning skills like this will make them very employable," Smith said while on a tour of the academy Thursday.

Senior Robert Pelfrey said he applied to the program thinking he wanted to become a pilot. He's decided that he wants to pursue computer science instead. On Thursday morning, he was working on syncing flight simulators so that multiple students could fly in the same simulation. "I still want to be a pilot, and this program really does help with that," Pelfrey said. "But that's not going to be my job."

Getting hands-on learning means that the building is filled with specialized equipment. There are rooms with aeronautical charts, flight simulators, 3D-printers and virtual reality headsets. In the air frame lab, there are two partially assembled planes that students are practicing on. "You cannot figure this out in a textbook - how to do safety wire or how to really (work) sheet metal," Smith said. "You get an understanding, but until you really make it engaging, it's not going to stick."

The 'straw that broke the camel's back'

The division leases over 27,000 square feet of the terminal. Their most recent lease with the Peninsula Airport Commission expired in 2016, but it's been extended several times. The division started negotiating a new lease in May 2018, according to a presentation given to the Newport News School Board in November. But even then, maintenance costs were piling up. The building racked up \$231,000 during the 2019 fiscal year, on top of another \$448,000 since

#### Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

July 2007. Photos in the presentation show some of the issues. Parts of the roof are rusted through, patched together over the years. In one photo, the walls are streaked white where water leaked from the ceiling. Leaks have damaged the ceiling and recycling bins are being used to catch water in another photo.

Although the terminal has a kitchen, division spokeswoman Michelle Price said the school hasn't been able to use it recently. Lunches have to be brought in instead. Because of the building's HVAC troubles, there are portable AC units in some of the academy's rooms. "I wouldn't call it an amazing fix, but I would say that it's something that's essential," Smith said. "You want the kids comfortable when they're learning, just like you want the teacher comfortable."

The school's initial lease, which costs about \$91,000 a year, required the airport commission to pay for repairs costing over \$5,000. The "straw that broke the camel's back," according to **Giardino**, was a piece of HVAC equipment. Although the division leases over 27,000 square feet, it only uses about 16,000 square feet. The HVAC unit mostly served vacant parts of the building. The airport, which has faced headwinds since the 2017 People's Express scandal, couldn't justify spending the hundreds of thousands on a replacement that wouldn't generate income. But that also knocked out heating and cooling to part of the school's space. "The relationship we have with all our tenants is the same," **Giardino** said. "My mandate is to make the airport sustainable, and things have to pay for themselves. Unfortunately, it's not a good value to put more money into that."

A walk-through by school division staff in September found that critical maintenance problems ran deeper: drywall needed to be replaced, ceiling tiles fixed and mold cleaned up. Since the division and airport decided not to continue extending the lease, the division has been paying for maintenance but not the lease. According to Price, it had spent about \$316,000 on the building as of November. "The building's tired," **Giardino** said. "The airport commission cannot legally take on any more funding towards the sustainment of the building."

#### Planning for a move

The move to Denbigh is expected to cost over \$1.5 million. The division plans to demolish some existing modular classrooms at Denbigh and add a new eight-classroom unit, which staff estimated in November would cost \$550,000. The academy's new home will be a self-contained wing in the northwest corner of the school, which currently houses foreign language and special-needs classes along with Denbigh's JROTC program. All the teachers will have to move. The division will continue to lease a hangar at the airport, according to Price. Students will still do things like practice taxiing and working on planes there.

Plans presented to the board call for the JROTC room to become the new air frame lab. The wind tunnel will go alongside it, with a control room. Lockers in the hallway will be relocated, and the wing will have its own office. Unlike the terminal, there's no Federal Aviation Administration-required off-limits areas. The wing offers 16,167 square feet, compared to the 16,204 square feet the academy takes up in the old terminal. "It's not one long hallway," Smith said. "It's in closer walking quarters." The Newport News School Board will get an update in April about the

#### Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

project. Work is planned to start June 16 and finish Aug. 18, with the space ready for classes by the end of August.

In 2016, around the time the last lease expired, the division and airport commission signed an agreement outlining a proposal for a new building. That 50,000-square-foot building on airport land would've cost \$22 million. The plan was to pay for it with state, airport and private money to transform it into the "Virginia Center of Aeronautics." Negotiations on the project stopped during the People Express Airlines scandal, which led to leadership changes, a criminal investigation and **Giardino**'s hiring.

According to **Giardino**, he is still working with the city, schools and economic development authority to find a place on campus for a school. "The focus of the academy is aviation, number one, and we're the community's airport," **Giardino** said. "Number two, it's got a two-decade history of being at the airport. I think that students and parents appreciate that."

Smith is optimistic about the future of the program. He hopes to see enrollment grow, more certifications offered to students and more advanced equipment. "Great things are going to be happening in the next five to 10 years," Smith said as he walked out of the future air frame lab at Denbigh. "I envision it. I just see it. The beauty of it is you don't know what it's going to be yet."

#### Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

Virginian-Pilot, The (Norfolk, VA) January 20, 2020

#### Get "REAL ID" by Oct. 1 - or you might not be able to fly

Author/Byline: Peter Dujardin

You landed a great deal on airplane tickets for a family vacation this fall. So you show up at the airport on Oct. 1 with your spouse and three excited kids and lots of luggage. But when you hand over your boarding pass and driver's license at the security checkpoint, the Transportation Security Administration screener cuts your vacation short: because you don't have a "REAL ID" - a new state driver's license that meets new federal security standards. "The officer looks at your license and says, 'Oh, I'm sorry, that license is no longer valid for you to get through the checkpoint,' " said Lisa Farbstein, a TSA spokeswoman. "So now you are officially between a rock and a hard place."

It's a scenario that airlines, airports and the TSA fear could happen to millions of Americans when the new rules take effect Oct. 1. Travelers 18 years old and older won't be able to fly unless they have either a REAL ID, an active passport or limited other forms of identification. "It could cost you thousands of dollars because you could have non-refundable tickets, perhaps you've got a prepaid rental car, prepaid hotel," Farbstein said at an event Friday at the Newport News airport to push for awareness about REAL ID. "It's just not something you can talk your way out of." There are about eight months left for people to get the new ID cards.

"We are facing a reality that time is ticking, and a date is coming," said **Michael Giardino**, the executive director of Newport News/Williamsburg International Airport. "It's very important to us as part of that customer experience that people have seamless travel ... and that includes with the checkpoints," **Giardino** said. "Sometimes we're resistant to change as human beings, and for whatever reason people have waited this long. But again, time is ticking."

Congress passed the REAL ID Act in 2005 following a recommendation by the 9/11 Commission. The 2005 law establishes new standards for the identifications accepted by federal agencies, with states across the country now issuing the REAL IDs. The new cards have security features embedded into them. They are marked by stars, typically sporting the symbol in the upper right. "We don't want to inhibit anybody's travel," said Chuck Burke, the TSA's security director for Central Virginia airports. "We want them to fly. We want them to travel in ease, comfort and everything else like that. And so the sooner you get the REAL IDs, the better it will be." And Burke warned: "There is no plan, no process, to extend that deadline."

Aside from passports, certain other documents will be deemed acceptable in lieu of a REAL ID. Those include some Defense Department identification cards, a Department of Homeland Security "trusted traveler" card, foreign passports, a tribal ID card, among others. But most people will need either valid passports or REAL IDs. In Virginia, the new IDs are being issued at Department of Motor Vehicles offices around the state. Because January is traditionally a slow month at the agency, "now is a great time to visit," DMV spokeswoman Brandy Brubaker said at

#### Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

Friday's event. "The sooner the better," she said. "We expect a rush of customers to visit us as we get closer to the enforcement date." Virginia was among the states that made REAL ID an optional - not automatic - part of getting new driver's licenses and renewals. The cards aren't needed for travel on trains, buses or boats. But people who travel by plane - even if it's a rarity - "will want to have one," state officials say. "Even if you don't think you're going to use it, it's probably a good idea to have one," Brubaker said. "My parents don't fly, but they'll probably get one in case they win a trip on "Kelly and Ryan" or something." Brubaker said about 40% of Virginia's 6 million driver's license holders - or about 2.6 million people - will likely need REAL IDs. A few weeks ago, she said, Virginia just passed the 1 million mark, with 175,000 of those issued in Hampton Roads. That means 1.6 million people need the cards and don't yet have them.

To get a REAL ID, you must visit the DMV in person rather than online - and bring documents showing your identity, Social Security number and two proofs of Virginia residence. That could mean, for example, a birth certificate or valid U.S. passport; a Social Security card or tax documents, such as a W-2, showing the full number; and a valid driver's license with the current street address plus a recent utility bill. If your legal name is different from what's on the documents, Brubaker said, the name change can be proven by a marriage license or court divorce decree. Virginia birth certificates and state marriage licenses are generally available through the DMV, while new and replacement Social Security cards can be obtained at ssa.gov. The DMV charges a \$10 surcharge for getting the REAL ID on top of other fees. For more information about the required documents, go to dmvNOW.com.

"Why make it hard?" **Giardino** urged the public on Friday. "I have mine. It's right here, and it was easy to get and very simple ... We want the travel experience for our passengers to be seamless ... Why wait? Get this done. It's fast. It's simple and easy to do."

#### Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **Michael A. Giardino** is listed below.]

https://airportscouncil.org/press release/avls-lew-bleiweis-becomes-airports-council-chair/

Airport's Council International Press Releases January 2, 2020

#### AVL's Lew Bleiweis Becomes Airports Council Chair

Author/Byline: Unknown

In addition to welcoming a new Chair, ACI-NA also announced the election of several new Board members and Policy Council members, including:

**Michael A. Giardino**, Executive Director of the Peninsula Airport Commission was elected Chair of the Small Hub Airports Committee and will join the U.S. Policy Council in that role.

#### Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

Daily Press (Newport News, VA) April 28, 2019

# Newport News airport takes over trailer park - 96-lot park will bring new revenue stream to airport

Author/Byline: Peter Dujardin

The Newport News/Williamsburg International Airport soon will take over the day-to-day operations of its on-site mobile home park. The move - which begins Wednesday - adds to the list of revenue streams that airport workers now are handling in-house rather than farming out. The airport already runs its own parking lot, which is one of the facility's biggest moneymakers. Parking is projected to net the airport more than \$1.46 million after expenses this year, and fund about a quarter of the airport's annual budget.

In 2017, the Peninsula Airport Commission ousted its former food and beverage provider, terminating a long-term lease. Airport staffers now directly run the new terminal restaurant, Take PHFlight. The restaurant is expected to net more than \$100,000 in the fiscal year that ends in June, Finance Director Renee Ford said. That's more than twice the \$48,000 the airport netted on food services in the private vendor's last full year of operation, she said.

Now the Patrick Henry Mobile Home Village also will be run directly by the airport. Among the reasons: The trailer park is close to being in the red this year, and the airport thinks it can do better. That's an important consideration, given that the airport has a tight budget as of late caused by fewer commercial flights in and out of the airfield. "We have to improve the safety and security over there (at the trailer park) and No. 2, it can't be a drain on the system," airport Executive Director **Mike Giardino** said. "We don't want to run a business that's not at least breaking even."

The trailer park was expected to bring in \$455,000 in rents in the year that ends June 30. With about \$433,000 in projected expenses, that was supposed to net the airport a modest \$22,000 for the year. Instead - with rent collections about 7 % off - the trailer park is barely making ends meet: The park so far has netted only \$1,070 for the fiscal year, and won't come close to the \$22,000 that initially was projected, airport numbers show. By contrast, Kentucky Farms - a privately run horse pasture on airport land - brings in \$42,600 in annual rent on virtually zero expenses.

The mobile home park, visible through trees from the airport's parking lot, now has 96 trailers, according to a Daily Press count. That's down from 140 mobile homes in 2008, and far fewer than the 250 trailers on the site in the 1990s. Rent, at \$399 a month, includes the land as well as water and sewer fees, with tenants maintaining their own trailers and paying for electricity.

Airport officials said at a February board meeting that commissioners are concerned with an outside contractor's management - "or lack thereof" - of the trailer park. One commissioner said the trailer park was being "neglected" by the firm, that residents deserved better, and that rents

#### Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

weren't coming in as they should. **Giardino** fired off a hard-hitting letter in February to Tidewater Premier, the Smithfield company that has run the park since 2010. But instead of vowing to make things right, he said, "They wrote us a letter back saying they quit."

The airport got no response to a request for proposals last fall to run the trailer park. And only two companies responded to a second RFP this year that had an April 3 closing date. One of the responses, **Giardino** said, was a one-page letter from a local real estate company "that we didn't contemplate." The only true response, he said, was from Caldwell Thompson Co., a Fredericksburg real estate firm. "We decided not to select them because they didn't meet our criteria," **Giardino** said. "They were just not a good fit in our judgement. No. 1, they were not local, and it would be nice to have a local management company ... And we are satisfied that we can run the operation right now."

The airport itself has long maintained the sewer and water lines into the park, as well as the trees, streets and street lights. The outside vendor deals with the tenants, collects the rents and handles trash collection. Viveca Munger, a paralegal recently hired as the airport's director of business development and corporate analytics, will now run the trailer park. She will also look for ways to save costs and put the operation more firmly into the black, Ford said.

**Giardino** said he's looking forward to a good working relationship with residents, saying the airport will host town hall meetings and have residents sign new leases. "We are a good landlord to our tenants," **Giardino** said. "We are a good landlord to our rental cars companies, the airlines and (others). Everyone is happy with our landlordship. That's what I do, I'm a landlord. I manage the facility on a landlord-tenant basis." If the airport must evict people, he said, it will do that, too. "We will take appropriate action, whatever that is," **Giardino** said. "It will be a very transactional relationship."

Peninsula Airport Commission Chairman Sharon Scott said she doesn't have a problem with airport employees running what she jokingly calls the "mobile home estates." "I don't see it as a being a herculean task," she said. "It's basically collecting rent and making sure the grounds are (kept up). I don't see it as being extremely time consuming." Scott predicted the airport eventually would have an outside vendor handle the work, and she voiced concern that the recent RFPs might not have been seen by many local real estate firms.

In response, **Giardino** said the RFP was posted on eVA, Virginia's primary and well-known procurement website. It was also advertised in the media, he said, and his staff contacted many local firms directly. He said he and his staff are on the lookout for new ways of doing business that could help the airport's bottom line. "Everything is open," **Giardino** said. "We are doing really well (on parking), but if someone would make an offer to run the parking, we would take a look at that ... It's just a matter of staffing, and how you want to run the business."

#### Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

Daily Press (Newport News, VA) April 11, 2019

# Peninsula Airport settles lawsuit - Former executive director given \$300,000 to end defamation case, avoid a jury trial

Author/Byline: Peter Dujardin

The Peninsula Airport Commission's insurance firm has agreed to pay \$300,000 to settle a defamation lawsuit by the past head of the Newport News/Williamsburg International Airport. The agreement with former executive director Ken Spirito was arrived at during a court-ordered settlement conference Tuesday, airport executive director **Mike Giardino** said. The deal - to be voted on by airport commissioners today - came a week before a jury trial was expected to begin in U.S. District Court in Newport News. The deal came six days after U.S. District Judge Henry Coke Morgan Jr. issued a key ruling in which he tossed part of Spirito's case but allowed much of it to proceed to trial.

**Giardino** said the six-member Peninsula Airport Commission will meet Thursday morning to vote on the agreement. "This ... settlement agreement shall be subject to the adoption of a public resolution of the (airport commission) approving the transaction," said a memorandum outlining the settlement terms. Under the deal, Spirito agrees to give up "any and all claims" against the airport, while the airport also gives up all future claims - "known and unknown" - against its former executive. The \$300,000 must be paid within five days.

In his lawsuit, Spirito had contended that airport employees and a commission member had defamed his character over his shredding of documents at the airport in early 2017. At the time of the shredding, the state's Department of Transportation was conducting an investigation into the airport. Spirito said the documents he was shredding had nothing to do with the state's investigation - and that texts between employees gave a false implication of impropriety. He said he was simply shredding "old, duplicate airline presentations" on one occasion, and that another allegation of shredding was simply made up.

Tuesday's settlement conference - with U.S. Magistrate Judge Robert J. Krask presiding - led to a deal between Spirito, the airport's insurance carrier, Chubb Insurance, and lawyers from both sides. **Giardino** and airport lawyers also attended. "It wasn't the call of the (airport commission) - it was the insurer's call," **Giardino** said of the deal. "We have insurance for a reason, and this is how it went. ... People do risk assessments, and that's what insurance companies do."

As for the airport, **Giardino** said, "More of our concern is that we're past this and moving forward." Even though the money is coming from insurance, **Giardino** said attorneys agreed that it made sense - for the sake of public transparency - that commissioners vote on the deal. "Instead of just saying, 'The insurance company took care of it,' and it goes in the file, the consensus was that it would be a good act to publicly endorse it," he said.

#### Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

Spirito's attorney, David L. Littel of Virginia Beach, declined an immediate comment, saying he would speak about the suit Thursday. Spirito - who led the airport for eight years before being fired in May 2017 - could not immediately be reached.

The former executive initially filed a defamation lawsuit against the airport commission and the employees in Williamsburg/James City County Circuit Court in early 2018. But a Williamsburg judge tossed the case, saying in part that the defendants did not act with "reckless disregard" for the truth, a crucial part of defaming a public official. Spirito's lawyer took the case to federal court, contending that the implication that he was doing something wrong destroyed his aviation career and "shattered" his reputation.

Named as defendants were the Peninsula Airport Commission, the Daily Press, airport accounting specialist Lisa M. Ortiz, airport finance and administration director E. Renee Ford, former airport supervising janitor Wilmer K. Thomas Jr., Newport News City Councilwoman and airport commissioner - Sharon P. Scott.

Morgan tossed the case against the Daily Press earlier this year, granting a motion from the newspaper's lawyers that the paper accurately reported on the findings of a state audit report. The judge dismissed all of the individual defendants on March 19, leaving the Peninsula Airport Commission as the only defendant.

#### Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

Virginian-Pilot, The (Norfolk, VA) December 17, 2018

W.M. Jordan to build \$3M private hangar at Newport News airport - After contentious negotiations, deal struck for new building at airport for local firm's two planes Author/Byline: Peter Dujardin

After months of sometimes-heated debate over the \$3 million project, one of the Peninsula's most prominent companies has landed a deal to build a new private airplane hangar at the Newport News airport. The Peninsula Airport Commission voted 4-0 to approve a long-term lease allowing the W.M. Jordan Co. to build a nearly 15,000-square-foot building on about 1.5 acres of airport land. The new hangar, connected to a tarmac and runway, will park the company's two planes - a brand new \$18 million Cessna Citation Latitude that's used to shuttle around company executives and an older Beechcraft King Air 350. The deal brings to a close more than seven months of negotiations.

W.M. Jordan, a Newport News-based construction management firm, first approached officials at Newport News/Williamsburg International Airport in March on its plan for what it called a new "first-class" hangar, near one for Smithfield Foods. But then-company president John Lawson II contended in a hard-hitting letter to airport commissioners in June that the airport was dragging its feet on the lease deal and failing to operate in a business-friendly way.

"It's finally done," Lawson said last week. "It ended up the way I thought it should have happened back in April or May; it just took a lot longer." He said "it's to everybody's advantage" to have the new hangar, jobs and taxes in Newport News. "I could have built it in Norfolk, I could build it in Chesapeake," Lawson said. But I said, 'Don't make me do that.' I wanted to build it in my hometown."

The 15-year lease, with two five-year options, was signed Nov. 29. A W.M. Jordan subsidiary, Air Jordan LLC, will construct the building and then pay the airport to lease it. The company will pay \$20,357 - or \$1,696 a month - for the first year, with the cost going up 2 percent annually. Other adjustments can be made with changes to the fair market value.

The city of Newport News stands to collect about \$60,000 in annual airplane property taxes on the Citation Latitude next year.lease tax on the building. "It's great news - it shows that we're open for business, as they say," said Airport Executive Director **Mike Giardino**.

W.M. Jordan bought the new airplane in early 2018, Lawson said, because it now does business in three states and executives need the plane to visit job sites and meet designers and customers. But it's been a logistical hassle to use the new aircraft, he said, because it's in a hangar at the Richmond International Airport, even as the executives and pilot work out of the company's headquarters in Newport News. Lawson, who stepped down from day-to-day management of W.M. Jordan in August but is still executive chairman, said the company has already purchased all the materials needed for the new hangar, with construction to begin in January. "We think we

#### Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

can knock it out in five months - by the end of May," he said. With the deal done, W.M. Jordan's attorney on the lease - Lindsey A. Carney from Patton, Wornom, Hatten and Diamonstein - is expected to finally take her seat on the airport commission. Newport News' City Council appointed Carney to the board earlier this year, but she's been waiting until the deal was done to begin in that role.

Lawson contended in his June letter that the airport was giving his company the runaround. "This is a really simple deal," he told the Daily Press at the time. "This is about as simple a construction and lease deal as you can possibly do." At a heated airport board meeting the next day, board member Jay Joseph said he found Lawson's complaints "legitimate," and pressed **Giardino** and the airport's interim attorney, James S. McNider III, on why it was taking so long.

McNider and **Giardino** said the letter was unwarranted, and that they were trying to work out a deal. They said they wanted to improve airport leases and couldn't just take an old one and rehash it, with **Giardino** showing board members a list of the communications between the sides. Lawson said he met one-on-one with **Giardino** a couple weeks later "to express my frustration at the delays" and reiterated that he wanted a "simple deal" and wanted Newport News to get the taxes. Soon thereafter, **Giardino** switched out the airport's lawyers on the project.

While **Giardino** said he was satisfied with McNider's work on the lease, "I saw how things were going," he said. "McNider took a beating by the commission, and he ends up being the fall guy for a lot of stuff." The executive director said he asked a Boston law firm, Anderson & Kreiger, to finish out the deal.

The commission approved the new lease contingent on getting a pending permit from the Virginia Department of Environmental Quality. The board signed off on spending \$19,200 on "wetlands credits" to make up for the destruction of about half an acre of wetlands on the site. Airport officials said a state grant will pay for 80 percent of the \$19,200. W.M. Jordan will also build a small berm near the hangar to prevent adjacent wetlands from draining out.

#### Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

Daily Press (Newport News, VA) August 1, 2018

# County covets land eyed for conservation - State wants easement on plot near airport that York says is prime for development

Author/Byline: Marie Albiges

The state is getting pushback from York County on a proposal to designate more than 330 acres of land for conservation near Newport News/Williamsburg International Airport. York County Administrator Neil Morgan told the Virginia Department of Conservation and Recreation in mid-July he opposed putting conservation easements on about 200 of the 337.7 acres off Old Denbigh Boulevard near Harwoods Mill Reservoir because the land is designated for long-term economic development and should remain as such. The two parcels at 108 Elm Drive and 420 Oriana Road - located north of the airport - are zoned for limited industrial business.

The state wants to protect the land permanently and has acquired grant money - given as part of the funds from Dominion Energy to mitigate the impact of the power line across the James River at Skiffes Creek - to buy the land from its current owner, the Peninsula Airport Commission, which governs the airport. Morgan said if that happens, any potential tax revenue to York County disappears - and the county doesn't have a lot of taxable land. It also doesn't collect taxes from the airport commission on this land.

Watershed property takes up more than 10 percent of the gross land area, and federally owned property eliminates slightly less than 50 percent of the county's taxable land. "At this point, it's just more of the principal of, we don't have a lot of taxable undeveloped land, and we're not excited about the state agency coming along and buying it from the airport and then taking that possibility off the table forever," he said.

The county spent \$35,700 to determine that 140 of the 200 acres would not be subject to any "unusual" environmental restrictions, and Morgan said the site had recently been identified as a regional economic development "mega-site" for Hampton Roads by the Planning District Commission. The county's Economic Development Authority was in negotiations to purchase the land from the airport commission in 2016, but Morgan said that fell through.

For the airport commission's part, Executive Director **Michael Giardino** said nothing's been finalized, and the commission is considering the sale of the property to the conservation department. "It is a huge question to ask, 'What do we want to do with that parcel?' " he said. "We want that parcel to support our core mission to be able to run the airport."

Jason Bulluck, director of the Virginia Natural Heritage Program at the Department of Conservation and Recreation, said without York County's support, the preservation project would have to be reconfigured to exclude the land the county wants to use for economic development. The project involves the state acquiring other parcels, such as one located in York County at 700 Country Lane near National Colonial Historical Park, for preservation. Morgan

#### Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

said he wasn't opposed to designating that land for conservation. Newport News Waterworks has also donated matching land with conservation easements for the project. "There's not any hard feelings or ill will," Bulluck said of the county's opposition. "We just realize that now there needs to be some adjustment apparently. That's what we're hoping we can find common ground on." Morgan proposed a meeting with representatives from the Department of Conservation and Recreation, the Peninsula Airport Commission and the city of Newport News, and Bulluck said he would agree to a meeting, either in person or over the phone.

"We want the airport to do well," Morgan said. "Newport News wants the airport to do well. We want to protect the watershed. We do have to look out for our finances and the region has a shortage of large sites for the economy of the future. I just think we ought to not just kind of frivolously let one escape when we have the opportunity to take a long-term approach."

#### Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

Daily Press (Newport News, VA) July 1, 2018

# Airport's legal expenses continue mounting - People Express, defamation suit part of \$900K bill

Author/Byline: Peter Dujardin

The Newport News/Williamsburg International Airport has racked up nearly \$900,000 in legal expenses - and counting - over the past year and a half as it's dealt with a wide range of significant legal issues. There's been a lot to contend with: Potential litigation that stemmed from the Peninsula Airport Commission's \$5 million loan guarantee to People Express Airlines. A pending defamation lawsuit filed by the airport's former executive director. Litigation with the airport's former food services provider. And lots of other issues, too.

The fee clock typically ticks at a rate of \$375 an hour now, but it's been as high as \$950 an hour for one attorney. The clock runs for everything from researching issues, writing legal briefs and attending court hearings to 10-minute phone calls and five-minute emails. It's not uncommon that two airport-paid lawyers talk with each other about the cases - both of them billing the airport separately for the same phone call, records show. All told, the airport dished out \$783,361 in legal fees in 2017, according to attorney invoices obtained by the Daily Press under the Virginia Freedom of Information Act. That's 16 times the annual average of \$46,685 that the airport spent between 2009 and 2016. The 2017 numbers are more than twice the prior eight years combined. And the bills are still coming in. The airport has spent \$105,471 on legal fees in the early part of 2018 - bringing the total paid out during the past 18 months to \$888,832, the documents show. But the airport's main interim lawyer hasn't yet billed the airport for March through June. When those invoices come due, the charges are expected to easily surpass \$900,000 for the stretch.

#### 'A lot of money'

Airport Executive Director **Michael Giardino**, who took the airport's helm in November, acknowledges that the legal fees have made making ends meet more difficult. "It's a lot of money," he said. "It's a strain on the budget, and we want it to go away. Because it hurts us. It impacts us. It's all local money, and it's revenue of the airport, so obviously that hurts."

At the same time, **Giardino** calls the legal fees "a necessary evil" to sort out the various legal morasses. "These things cost money," he said. "Work costs money, litigation costs money, depositions cost money. ... The attorneys don't do it for free, and we don't expect them to." "My first day on the job, we got a draft lawsuit from the former executive director," he said. "Rather shocking." A case involving the airport restaurant provider was well underway when **Giardino** arrived, as was another involving TowneBank. And when he interviewed for the job in September, he said, the Federal Aviation Administration had just sent an inquiry letter to the airport two days earlier. While several of the legal disputes are still ongoing, **Giardino** points out that one of biggest legal battles - the airport's claim against TowneBank and the airport's former law firm over the People Express deal - has been settled out of court. That \$2 million settlement

#### Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

was reached in December with TowneBank and Jones Blechman Woltz and Kelly, with the deal passing muster with former Virginia Secretary of Transportation Aubrey Layne. He's the man who - after a hard-hitting state audit into the airport - told the airport's board last year to go after the \$4.5 million in taxpayer money paid to the bank in the People Express deal. Also, **Giardino** said, the FAA inquiry is moving toward a positive resolution. "We have the right to defend ourselves in all of these cases, and I think we've proven ourselves relatively successful," he said. "We are going to rigorously defend ourselves." And though the legal payments were far lower in past years, **Giardino** said, "Look where it got us." Yes, "hindsight is 20/20," he said, but perhaps more sound legal advice in the past might have prevented some of the issues now.

#### Impact on airport

The lawyer fees are paid out of the airport's operations budget, which amounts to about \$8 million annually. That's derived from airport revenue - such as parking fees, and rents to car rental companies, airlines and other businesses. At several recent Peninsula Airport Commission meetings, airport Finance Director Renee Ford has brought up the attorney fees as creating tighter margins or even causing some monthly losses. "That is the main thing that's causing our financial results to look the way they do," Ford said.

Over the past 18 months, Sharon Scott, a Newport News city councilwoman and member of the airport commission, has at times questioned the rising legal fees, saying she was "flabbergasted" by them and calling them "exorbitant." Though she hasn't stepped in to stop the payments, she said she plans to focus on the issue more heavily when she becomes the commission's chairman on Sunday. On Thursday, the board - led in part by Scott - told **Giardino** to issue a new Request for Proposals for a new permanent airport attorney. Though several law firms applied for the work under a prior RFP last August, a hire was never made.

James S. McNider III, the Hampton lawyer who's been the airport's interim attorney since March 2017, said the airport's legal fees - including the \$437,079 that he's billed - have been worth it. "The Newport News/Williamsburg International Airport is a \$100 million asset in a highly regulated industry," McNider said. "Legal services are an integral part of a properly functioning airport. We have been under attack for over a year. Litigation is expensive." Last year, the airport "got a sizable recovery (in the TowneBank settlement) that then had the ripple effect of alleviating the FAA and the VDOT audit inquires," he said. "Aubrey Layne put the Peninsula Airport Commission on terms, and we produced." But the spiking attorney fees don't sit well with Tom McDermott, the Hampton restaurant owner involved in a heated legal dispute with the airport over how much he should be paid for his capital investments into the facility over the years.

The case, McDermott said, could have been settled long ago. But he contends that McNider has extended the case by filing "frivolous motions" and refusing to sit down and talk, leading to more money for the lawyer. "The attorney fees have been outrageous," McDermott said. "Why would they never want to sit down and at least discuss this? He's making bank. If they had a qualified firm, this would have been settled a year ago." Asked for a response to McDermott's comments, McNider said: "The (Peninsula Airport Commission) will continue to defend its

#### Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

legitimate interests. This is standard fare - when someone isn't getting what they want, they attack the lawyer."

Rundown of legal issues.

Here are some of the biggest legal hurdles the airport has faced in the past year:

Dispute with bank and law firm. The Peninsula Airport Commission - the six-member board that runs the airport - had backed a \$5 million loan to startup People Express Airlines in 2014. When the airline collapsed a couple months later, the airport paid \$4.5 million in taxpayer money to TowneBank to cover the debt. Last year, the airport attempted to claw back that money from the bank and the airport's former law firm, Jones Blechman. The two sides hammered out a settlement in December. The bank and law firm jointly agreed to pay the airport \$2 million: \$1.65 million in cash and a reduction of \$350,000 in the the airport's future interest payments on a prior bank-issued bond.

Dispute with restaurant company. That company, New Dominion Clubs, disputed with the Peninsula Airport Commission over its decision in late 2016 to terminate the restaurant's long-term lease. Though a judge ruled in early 2017 that the airport was within its rights to do so, there's still a pending dispute over how much the airport needs to pay New Dominion for its back capital investments. The company says it's owed \$815,000, while the airport says it hasn't seen adequate backing for that. That case is still pending.

Lawsuit by former airport leader. The airport's former executive director, Ken Spirito, is suing the Peninsula Airport Commission and several employees. He accuses them of defaming his character during a state audit of the airport before he was fired in May 2017. Though a Williamsburg Circuit Court judge tossed the lawsuit, Spirito has filed a nearly identical case in federal court, also adding the Daily Press as a defendant. That case is pending.

Joint federal and state investigation. Last June, the Virginia State Police, the Internal Revenue Service's criminal investigation division and U.S. Department of Transportation's Office of Inspector General began investigating the airport. Some witnesses have testified before a federal grand jury in Newport News as part of that case. Federal Aviation Administration inquiry. Last year, the FAA began looking into the airport over spending issues, with the case having the potential to affect future federal airport grants. That inquiry is still pending.

Sandy Wanner, who led the airport on an interim basis for eight months last year, said the sudden termination of the airport's legal representation in March 2017 led a Newport News Circuit Court judge to "order us to get an attorney" quickly because of pressing timelines in the restaurant dispute. That came after the airport commission ended its long-term relationship with Jones Blechman lawyer Herbert V. "Bert" Kelly Jr. "And then while that was unfolding, the (VDOT) audit started to unfold with all of its issues," Wanner said. "And then as it continued, there was the issue of how we were going to try to meet the state's expectations by getting financial repayment from any number of sources. ... Everything just started to take over. All of the events were just cascading down."

#### Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

Four law firms accounted for the \$888,832 in legal fees over the past 18 months, airport records show. Jones Blechman Woltz & Kelly: \$96,389. The Newport News law firm was let go as the airport's law firm in March 2017 after the People Express scandal erupted. But before that happened, the firm billed the airport \$96,389 for hours worked over a nearly three-month stretch between Jan. 1 and mid-March. Kelly and another lawyer with the firm billed at \$400 an hour, while some others billed at lesser rates.

James S. McNider III: \$437,079. The Hampton lawyer was hired in March 2017 to step in immediately. He was hired on an interim basis - with the airport's board not following its normal competitive bidding rules. That came after the Newport News judge ordered the airport to get immediate counsel in the restaurant case. That "interim" relationship has now lasted more than 15 months. At Peninsula Airport Commission's board meetings, McNider has sat in the attorney's seat that had been held for decades by Herbert Kelly Jr. and his father before him. McNider has billed the airport for 1,068 hours worked since March 2017, documents show. At an average rate of about \$395 an hour, that comes to \$420,707. (His hourly rate was reduced from \$400 to \$375 in November). Other work has been performed by McNider's paralegal, at \$80 an hour. McNider has not yet submitted his bills for March through June of this year, airport officials say.

Hausfeld LLP/Walter D. Kelley Jr.: \$312,964. In June 2017, the Peninsula Airport Commission hired Walter D. Kelley Jr., an attorney with Hausfeld LLP, a Washington, D.C., law firm. His job: To help claw back the \$4.5 million from TowneBank and Jones Blechman. Kelley, a former federal district judge in Norfolk, was initially hired under a flat fee of \$30,000 to do some initial work for an undisclosed number of hours. The PAC then hired him in July 2017 for continued work - at Washington, D.C., rates. Kelley was first hired at \$945 an hour, which was adjusted in November to the "discount rate" of \$850 an hour. As with McNider, Kelley's hire was made without competitive bidding. Hausfeld tallied \$273,910 for 330 billable hours. That comes in at \$828 per hour when some work by lesser-priced attorneys is factored in. Hausfeld billed the airport \$9,053 in other expenses, to include \$2,773 in Kelley's travel costs, such as mileage back and forth to Newport News, hotel costs and meals.

Anderson Kreiger LLP: \$42,400. The airport commission hired this Boston-based firm in late 2017 to help the airport respond to the FAA's inquiry. The work included 122 billable hours, clocked at an average hourly rate of \$337. Conrad Shumadine: This Willcox & Savage attorney in Norfolk was hired by the airport's insurance firm, Chubb Insurance, to defend the commission in the Spirito lawsuit. But Chubb's payments aren't public records. McNider has separately billed the airport for significant hours on the Spirito defamation lawsuit, though McNider says Shumadine has spent far more time on it. Walt Kelley has also billed for some hours on that case.

#### Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

Daily Press (Newport News, VA) May 19, 2018

# A pivot on air service strategy - Rather than chase discount carriers, airport will push big airlines to add more flights

Author/Byline: Dave Ress

Newport News/Williamsburg International Airport is steering a new course to boost traffic, turning away from its longtime strategy of wooing low-fare airlines. The new effort will instead focus on the Big Three airlines, two of which already serve the airport, said Executive Director **Michael Giardino**, detailing the approach in a working session of the Peninsula Airport Commission. The aim is for more frequent flights and better connections, direct and indirect, to destinations sought by Peninsula travelers. Easier travel for Peninsula residents is the airport's main mission, even if this market might seem smaller than Richmond and South Hampton Roads - where the commission had long wanted to attract customers with low-fare airlines, **Giardino** said.

Delta and American - two of the Big Three - currently operate 10 flights daily to Atlanta, Charlotte and Philadelphia from Newport News. **Giardino** is working to convince those two airlines to add more flights to those cities and to consider service to some of their other major hubs, such as Dallas-Fort Worth, Detroit or Minneapolis. He's also hoping to convince United - the third airline of the Big Three - to begin operating connecting flights from Newport News to Dulles and the airline's other hubs.

**Giardino** is working with local businesses, including a meeting just this week with travel managers from Newport News Shipbuilding, Ferguson Enterprises and Liebherr, on a campaign to convince the big airlines that there are enough businesses here to justify adding flights. "We're leaking 1,000 passengers a day," he said. **Giardino** said Peninsula business leaders tell him they're tired of routing their employees and customers through one airport that can be an hourslong traffic jam away and another that's 65 miles up Interstate 64. "I've had one tell me they sometimes have to put people up in a hotel to make sure they can catch a flight," **Giardino** said. "We're not trying to poach anyone else's traffic, we just want ours," he said.

The airport has long focused on attracting low-fare carriers, such as Allegiant, Frontier and the now-defunct People Express, wooing them with subsidies and other incentives. Previously, AirTran operated a discount service for many years as the airport's financial mainstay. Allegiant, Frontier and People Express dropped service in 2014, while the airport's guarantee of a loan to People Express cost it \$4.5 million. **Giardino**'s new direction "marks a shift away from the low-cost carriers," said airport commissioner Rob Coleman, noting that such airlines come and go easily, and often just chase airport subsidies.

Another kind of business travelers - the ones who rely on corporate jets - have stepped up interest in the airport, said assistant executive director Melissa Cheaney. She said she's fielded four or five inquiries about hanger space or the possibility of building hangers over the past

#### Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

couple of months. The airport has the facilities to handle much more traffic, **Giardino** said, noting that on Tuesday, it handled two flights diverted from New York's JFK International Airport. Those flights brought a unexpected 340 people for several hours to Newport News. They kept the airport commission's restaurant humming, filled trash bins to the brim "and the next day, you wouldn't have known they'd been there; the staff's work made things look better than before," **Giardino** said. The airport's push to expand traffic will also urge Peninsula travelers to take another look at flying from Newport News.

"I've been around, I've heard the rumbling and grumbling about fares," **Giardino** said. While the most recent federal survey, as of last fall, shows average fares at Newport News are somewhat higher than Norfolk or Richmond, airport marketing efforts going forward plan to focus on asking Peninsula travelers whether a \$15 or \$20 difference is really worth the travel time of going to another airport, marketing director Jessica Wharton said.

The airport's finance director, Renee Ford, presented a proposed budget calling for a roughly 4 percent increase in revenue, mostly from proposed increases in landing fees and terminal rents. Landing fees and the portion of terminal rents based on the number of passengers an airline carries are still well below half of what they probably should be to cover airfield and terminal operating costs, she said.

They are significantly below the fees and rents at **Giardino**'s old airport, in Rochester, N.Y., where, for instance, Allegiant paid landing fees amounting to \$1,200 a flight, compared to the \$300 that Newport News charged in what turned out to be a vain attempt for long-term service.

Ford's proposed budget calls for a 2.6-percent increase in spending, despite a hefty increase of nearly 25 percent for repairs and maintenance, as much of the airport's aging equipment runs past warranty expiration dates. But a sharp drop in legal expenses, which this year boosted spending on all outside services to \$1.15 million, up from a budgeted \$590,000, should help the commission hold the line on spending.

#### Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

Daily Press (Newport News, VA) March 27, 2018

Airport board to hire consultant - Company's goal is to gain more airline traffic locally Author/Byline: Peter Dujardin

The Peninsula Airport Commission on Thursday agreed to allow its executive director to negotiate with an aviation consulting firm to help in trying to land more airline traffic out of Newport News. The board voted unanimously to allow **Michael Giardino**, the executive director of Newport News/Williamsburg International Airport, to negotiate a contract of up to \$80,000 with Crawford, Murphy & Tilly, Inc., of Springfield, Ill. It would be for a one-year renewable contract to perform passenger traffic studies and help airport officials in making marketing pitches to airlines. The vote was 5-0, with one member absent. "They will help us to get the data analysis, message it properly and connect us where we need to get connected to get those wins we know we deserve," **Giardino** told board members before the vote.

While he said the airport's past executive director selected aviation consultants in an "ad hoc fashion" - going with various firms for such work - **Giardino** said he prefers to have one primary consultant he can turn to as needed. "I am asking for the commission to approve a 'term consultant' that we have vetted and that we think is qualified and the best fit," **Giardino** said. "We want to enter into a relationship with someone who knows us and we can call on."

Such a service might be a bit pricier than in the past. In answer to questions from board members, Renee Ford, the airport's finance director, estimated that such consulting services in recent years have cost between \$40,000 and \$50,000 annually. **Giardino** told the board that the airport issued a Request for Proposals in recent weeks, and that three firms submitted proposals for the work: Crawford, Murphy & Tilly, also called CMT, as well as AilevonPacific and Mead & Hunt. But CMT stood out above the rest, with the firm including significant analysis of Newport News in its proposal, **Giardino** said. "They obviously did their homework when they responded, not only listing references and qualifications, but they actually took a deep dive into our issues at our airport and presented some proposals already," he said.

Giardino told the board that he's had prior business dealings in Rochester, N.Y., with Will Berchelmann, the primary contact at CMT who would be leading the Newport News work. (Giardino was executive director of the Rochester airport before coming to Newport News last fall.) Giardino said he recused himself from the initial selection process - which he said was done by Melissa Cheaney, the airport's assistant executive director, and Jessica Minor, the airport's finance and administration manager. Cheaney told the board that CMT was the best fit. "They were all highly qualified, but CMT provided that detailed analysis," she said. "They went above and beyond to look at our market. ... They went six steps deeper to look at our populations and industries and tourism." They provided technical graphics and "slam dunked it," she said.

**Giardino** said he wants CMT to do a "catchment study" and a "leakage study" to give updated numbers on what cities and counties the airport's passengers are coming from - and what

#### Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

proportion are "leaking" to competing airports. He said he also wants the consultant to go with airport officials on visits with airlines in trying to get them to fly to Newport News, including on 15-minute "speed dating" pitches at various annual aviation conferences. **Giardino** said he will negotiate with CMT for the best deal for the airport. He said he will decide between the \$80,000 "menu of services option" the firm offers and a separate hourly rate contract.

Jessica Wharton, the airport's marketing director, said it's been a few years since the airport determined its "primary and secondary" catchment areas. "Primary is kind of like the Peninsula," she said. "Those are the passengers where we feel like they should be ours. Those are the ones we should be capturing that we don't want to leak to Norfolk or Richmond. Then there's a secondary catchment area. Let's call them battlegrounds, where they could drive really easily between us and Richmond." The key question, Wharton said, is "how do we maintain our primary (passengers). We want to maintain as many of our primary passengers from the Peninsula as we can," to "get people refocused on flying out of Newport News."

#### Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

Daily Press (Newport News, VA) March 10, 2018

# Elite cancels route, but says Newport News still in plans - Citing low demand, airline won't fly to Myrtle Beach

Author/Byline: Peter Dujardin

Elite Airways announced Friday that it has canceled plans to fly to Myrtle Beach from Newport News/Williamsburg International Airport, saying the passengers weren't there to support the flights to the South Carolina tourist destination. But Elite says it's still hoping to launch service from Newport News later this year, saying it's looking particularly at routes to Florida.

The Myrtle Beach service was to begin April 6. But bookings - on two flights per week - were not where they needed to be a month from the service's launch, the airline said. "We had high hopes for start of service at Newport News, but the demand for this particular city pairing wouldn't have been sufficient to proceed," John Pearsall, the president of Elite, based in Portland, Maine, said in a statement. "We are exploring other routes out of Newport News to popular Florida destinations later in the year, which we believe could drive stronger demand." **Michael Giardino**, the Newport News airport's executive director, said his understanding is that "bookings were light" for the Myrtle Beach route, and didn't meet the airline's threshold. "My understanding was the numbers just weren't there," **Giardino** said. "They're not going to do it for free. ... That's the nature of the business."

But **Giardino** said Myrtle Beach "was not in the portfolio" of destinations that the community and the Peninsula Airport Commission had sought in the first place. He said he's working with Elite - as well as other airlines - to launch service from Newport New to the Sunshine State and elsewhere. "I would implore any air service to fly to Florida," **Giardino** said. "But they're going to choose where they want to go. We're talking with the airlines about a lot of different places, to be honest."

**Giardino** said he's had "really good conversations" with Elite and believes they will still come to Newport News. "I think they believe that they can succeed here," he said. "We haven't had the service that we deserve." "But we want to make sure that whatever we start is sustainable," **Giardino** said. "That's important for everybody, whether that's Elite or anybody else. It's up to us to find the service and work with the airline. They usually offer bargain sales at first, and we advertise and do what we can. ... And the customers speak with their pocket books."

Elite first announced in December 2016 that it would fly out of Newport News. That announcement - which touted nonstop flights to Long Island, N.Y., and Newark, N.J. - promised desperately needed service at an airport that has struggled for passengers ever since AirTran Airways left the market six years ago. But a month later, Elite - citing "challenging perceptions surrounding the airport" - said it was putting its Newport News launch on hold. The airline was concerned that "various headlines" about the Newport News airport could cast a negative light on its operations, airport officials said. By that point, the Daily Press had published dozens of stories

#### Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

on a controversy that centered in large part on the Peninsula Airport Commission's 2014 decision to guarantee a \$5 million line of credit for People Express Airlines. When that startup airline collapsed three months later, the airport quietly used \$4.5 million in taxpayer money to pay the tab. Late last year, the airport reached a \$2 million settlement with a bank and law firm.

In December, **Giardino** - who took the helm as executive director in November - told the airport's board that he had recently talked to Pearsall and had a positive vibe about Elite still coming to Newport News. "We're still on Elite's radar," he told the board. He also referenced ground-handling equipment that the Newport News airport purchased to handle such services for smaller airlines. "We may be using that equipment pretty soon," **Giardino** said.

When it first announced it was coming to Newport News in late 2016, Elite stood to get an incentive package worth up to \$1.7 million to come here, according to numbers provided by the city and airport last year. That is, Elite was to get up to \$900,000 in revenue guarantee and other incentives from a regional body that funds airline incentives - the Regional Air Service Enhancement committee. The airport offered another \$800,000 in incentives, including fee waivers and free advertising. Such incentives are still on the table, city and airport officials have said. All passengers who bought tickets on Elite Airways out of Newport News have been contacted and are being fully refunded, the company says. They can also call the airline at 877-393-2510.

#### Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

Daily Press (Newport News, VA) February 25, 2018

Putting airport 'back on the map' - New executive director says facility is finding its footing Author/Byline: Peter Dujardin

The new executive director of Newport News/Williamsburg International Airport told the airport's board on Thursday that airlines around the country are now in an "expansion mode" and that the airport is in a good position to "put itself back on the map." **Michael Giardino**, the former Rochester, N.Y., airport executive who took the helm in Newport News in November, said the facility is getting back on its feet financially. The airport's operating budget is still "a challenge," he said. Case in point: The airport lost \$175,000 in January - the result of a traditionally slow month for passengers combined with flight cancellations from snow and continuing high attorney fees to deal with the airport's ongoing legal challenges.

But in capital projects, **Giardino** said, \$4.75 million has just arrived or will soon be coming. That cash will be used to pay bills on everything from revamped plane taxiways to a brand-new terminal security checkpoint to wetlands mitigation. The money includes \$2 million in state entitlement grand funds that will be coming in late March. That's the result of the Virginia Department of Aviation restoring the airport's annual state allotment and freeing up cash that the agency had frozen last year. The state's secretary of transportation put Newport News' entitlement grants on hold when he learned that the airport had used some of its prior grant money - typically earmarked for capital projects - to cover a loan guarantee to startup airline People Express more than three years ago.

The Newport News airport is also expected to soon get \$1.1 million from the Federal Aviation Administration to reimburse part of what the airport has already paid on a new security checkpoint at the terminal. In addition, TowneBank and the Jones, Blechman, Woltz and Kelly law firm recently paid the airport \$1.65 million in cash as part of a settlement to a months-long legal dispute over the 2014 loan guarantee to People Express. That money will go to capital projects, too. "We are now secure in our capital funding, and we can move forward," **Giardino** said. "Our capital accounts are full or will be full at the end of March. We have a plan for the future." The Department of Aviation, he said, is on board with the airport's capital projects out to 2021. Giving the Peninsula Airport Commission a rundown of his first 100 days on the job at Thursday's board meeting, **Giardino** also talked about several other highlights of his tenure. 'Getting to know the people and the place' **Giardino** said he's getting to know the airport, its staff and operations.

And Sandy Wanner, the former James City County administrator who led the airport on an interim basis for much of 2017, called on his Peninsula contacts and took **Giardino** to some 30 meetings to meet the area's movers and shakers. (The commission approved paying Wanner a certain number of hours a week to spearhead those meetings.) "Sandy was a great asset to reach out to the community, and we did that," **Giardino** said. "We made so many visits between November and the holiday that it was a blur. But in that blur, I took away a lot." Local leaders on

## Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

the Peninsula, he said, "are passionate about this place, and everyone has offered their support." "We had frank and honest conversations," **Giardino** added. "I have all of their mobile numbers, and I don't hesitate to call them."

Restoring public trust. Early last year, then-Virginia Secretary of Transportation Aubrey Layne froze much of the Newport News airport's annual state entitlement grants as a result of the 2014 loan guarantee to People Express. But **Giardino** said that by the time he arrived in November, the airport commission and staff had made strides to fix the relationship with the state. As a result, **Giardino** said, Layne called him two days after he got to Newport News to say he would do what he could to help. "There was a reconciliation that took place," **Giardino** told the board. "I don't think Secretary Layne would have made that phone call if it hadn't been. There was a lot that needed to be fixed. By the time I arrived, it had been fixed." Layne told the board in January that he was freeing up the annual state funds that were still frozen.

**Giardino** also referenced the letter the airport's board sent to the FAA on Feb. 1 - responding to the federal agency's concerns about the 2015 loan guarantee. He said he was looking forward to a positive response. "We think we are in good shape with that," **Giardino** said. The new director also said he's talked to airport staff about "loyalty and integrity." "I'm loyal, and I expect loyalty, and I expect integrity throughout," **Giardino** said. "I also expect firm, fair and consistent policies, and we've adjusted a few of those to make sure we are firm, fair and consistent." But he said there's still "a ways to go" on adjusting some of those policies.

Getting the word out about the airport. "We need to put ourselves back on the map," he told the board. "I say this five or six times a day. ... We aren't the first choice when putting an airport code or a city into the search box. It's not the thing they are typing in, and we need to change that." The airport's marketing budget is tight, he said. But "we can do it in a very efficient way," including with social media. "And just running a great airport will go a long way," he added.

#### Getting more air service

"I told everyone that we are focusing on the airlines that are in the building, because they are strong," **Giardino** said, referring to legacy carriers American Airlines and Delta Air Lines that already fly out of Newport News. But getting more air service here is a huge priority, too. Losing AirTran Airways in 2012, he said, was the result of Southwest Airlines buying AirTran to gain access to its routes to the Caribbean, and then closing AirTran routes many destinations. "They pulled out of 22 airports, and ours just happened to be one of the hardest hit," **Giardino** said. "It's no one here's fault that it happened. The good news is that we have the capacity for more, and we have a demand for more - and we'll get it. Airlines that were in a contraction mode from 2008 until about 2014 are now in an expansion mode. That's the good news. So we are poised and ready." On April 6, Elite Airways is launching new service out of Newport News to Myrtle Beach, S.C., on Mondays and Fridays. But the airport is hoping to get more routes on Elite, to other destinations, he said.

## Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

https://oysterpointer.net/michael-giardino-a-passion-for-flying-and-finding-solutions/ December 14, 2017

#### Michael Giardino: A passion for flying and finding solutions

Author: Cathy Welch

As executive director of Newport News/Williamsburg International Airport (PHF), Rochester, New York, native **Michael A. Giardino** and wife Janice are rediscovering life in Hampton Roads. "In 1966, I was sitting at the airport in the lap of my dad, who was taking flying lessons," he says of his early love of aviation.

**Giardino** earned his Bachelor of Science degree in meteorology, planning to work for the National Weather Service. Instead, he entered the U. S. Navy and flew an H46 helicopter with night vision goggles out of Fort Eustis' Felker Army Airfield and other Virginia Peninsula civilian fields. During his 26-year career, **Giardino** earned a Master of Arts degree in national security and strategic studies at the U.S. Naval War College and completed U.S. Naval Post Graduate School. He held leadership positions in Ramstein, Germany; Kabul and Kandahar, Afghanistan; and at the Pentagon.

**Giardino** holds the distinction of being a Mishap-free Naval Aviator, was an instrument check pilot and Night Vision Device (NVC) Instructor Pilot with more than 2,540 flight hours. He was a squadron maintenance officer, responsible for 14 aircraft and 250 personnel leading seagoing units, flying dangerous missions in harsh environments. He was also a nuclear weapons safety officer. And he was awarded two defense Meritorious Service Medals for service in Afghanistan, the Air Medal and the Humanitarian Medal as well as earning the Secretary of the Navy's Safety Award.

**Giardino** met his wife at their 10-year high school reunion. She embraced Navy life, was president of the spouse's club and ran many charitable events. When their family moved back to Rochester after separating from the Navy, Janice was able to spend a lot of time with her mom before she died.

Son Kyle, 28, was in the U.S. Marine Corps Infantry for four years and lives in Key West. "We both have been to Afghanistan, but Kyle was infantry and I was a staff officer," **Giardino** says. Son Dominic, 23, is in the Netherlands at The Royal Conservatory of The Hague on a Fulbright scholarship. He plays late 1700s-style clarinet.

In 1999's hurricane Floyd, **Giardino** made 110 helicopter rescues in the Tar River Valley in North Carolina. "It was the best flying I ever did," he says.

While in Hampton Roads with the Navy, **Giardino** was assigned to Norfolk Naval Air Station. He served on the USS Eisenhower, USS Saipan, USS Nassau, USS Savannah and worked as Military Sealift Command with the JFK Battle Group. **Giardino**'s last assignment in the Navy was as executive officer for Naval Air Station Key West. Before assuming the position of

#### Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

executive director of Newport News/Williamsburg International Airport in early November, **Giardino** was director of aviation with the Monroe County Airport Authority for the Greater Rochester International Airport. "Working for the Peninsula Airport Commission allows me to continue my career and passion for working around airplanes," **Giardino** says of his current position. "One of the things I bring to this job is that I've visited a lot of places."

In his travels he takes photos with his phone of restrooms, shelving, exits, advertising and parking lots to name a few, for the purpose of bringing positive things to his own airport. "Whenever you travel, you always bring something back," says Jessica Wharton, director of air service, marketing and public relations who does the same thing.

Patrick Henry Field (PHF) employs 90 workers, offering service on American Airlines to Charlotte and Philadelphia, and Delta Air Lines to Atlanta, both providing connections worldwide. The airport offers onsite shuttle service, free baggage carts and Wi-Fi. The airport recently expanded to consolidate two security checkpoints into one, improving TSA efficiency. It also added the new Take PHFlight restaurant and bar, a video wall and ample seating with charging stations.

**Giardino** enjoys playing and watching all sports. His favorite football team is the Buffalo Bills, and the Buffalo Sabres is his hockey team. He and Janice take walks and garden. After three years in Ramstein, the **Giardino**s enjoy traveling Europe. They've cruised the Baltic, the Mediterranean, the Nile and Scandinavia.

"The airport commission is excited to have Mr. **Giardino** lead, manage and develop our airport for future success," says George Wallace, Peninsula Airport Commission chairman. "We are confident [he] will assist the commission to exceed expectations of the State Aviation Board and our regional communities."

"Challenges and solving problems give me the greatest satisfaction in my work life," **Giardino** says. "No matter how big or small a challenge is, from flight diversions to small facility issues, finding solutions is my passion."

## Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

Virginian-Pilot, The (Norfolk, VA) November 20, 2017

#### New Peninsula airport director says restoring public trust is top priority

Author/Byline: Briana Adhikusuma

**Michael Giardino** is already creating a list of initiatives and goals for his first few years as the new executive director of the Newport News/Williamsburg International Airport. And public trust is at the top of it. "The goals – how about restore the public trust? I had walked into a similar circumstance in Rochester, by the way. The previous two directors had not done too well," he said. "The obvious thing for airports is to be a safe, secure and financially-stable facility. Airports are economic development musts; they're economic development drivers. So, having a commercial service airport in your locality is a plus for businesses to sustain them, to grow them, to expand them."

The Rochester, New York, native took over the airport's leadership Nov. 6 and was most recently the director of aviation with the Monroe County Airport Authority for the Greater Rochester International Airport since 2012. "I had a great gig. I left a great gig. But I think Rochester was home or had been my hometown, but it no longer felt like home," **Giardino** said. "And getting back to Virginia was – I don't want to say a godsend – but the idea of getting back to Virginia and this part of Virginia. ... was a goal, I would say. So it all just kind of fit."

**Giardino** first found a love for planes when his father, an Air Force veteran, was taking private pilot lessons in 1966. He was just a young boy at the time and his father sat him on his lap in the plane's cockpit. He instantly "caught the bug" for flying. From that first moment in the cockpit, **Giardino** went on to serve as a Naval aviator for 26 years and resided in Southeast Virginia for 10 years. His last command was as the executive officer for Naval Air Station Key West. "It's (flying) just a passion. I love aviation. I absolutely love to fly," **Giardino** said. "I miss it terribly. But that's OK. I get to be around them (planes) here and I get to help other people fly."

While serving in Monroe County, he managed a staff of 120. In his new position, **Giardino** will be supervising 93 employees and an annual operating budget of around \$8 million. The past nine months have been rocky for the Peninsula airport since its previous director, Ken Spirito, was fired in May. Spirito was first placed on leave in early March after an audit conducted by the Virginia Department of Transportation found he had used airport funds for personal expenses. Sandy Wanner served as the airport's interim director until Oct. 31.

As the new director, **Giardino** has been left with several issues – one of which is financial fallout over a \$5 million loan to startup airline People Express Airlines in 2014. The airline defaulted in 2015 and the Peninsula Airport Commission paid \$4.5 million to TowneBank, which issued the loan. But **Giardino** said he's committed to regaining public trust and moving the airport in a positive direction. "It's up to me to prove that – to restore the public trust. I hope they'll give me the chance to prove that," he said. "I think they have and will, but I guess we'll see over time, won't we?" **Giardino** also wants to increase the amount of air service at the

## Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

airport, including bringing in new airlines and establishing new routes. "Air service is huge on my agenda because that's what I'm supposed to be here for – to grow the air service development," he said. The airport currently has two airlines, Delta and American Airlines, that fly to three destinations: Atlanta, Charlotte and Philadelphia. "With those (federal) grants that we receive comes certain obligations and it should be used in the way it is intended to be used," **Giardino** said. "And we will make sure that we live up to that fiduciary responsibility."

**Giardino** graduated from the State University of New York at Brockport with a degree in meteorology in 1985 and was commissioned as an officer in the Navy in December the same year. He also studied information technology at the Naval Postgraduate School in Monterey, California, and graduated from the Naval War College in Newport, Rhode Island, with a master's in national security and strategic studies in 2001. Among his highest military decorations, **Giardino** received two Defense Meritorious Service Medals for his service in Afghanistan and the Air Medal and Humanitarian Service Medal for 110 rescues after Hurricane Floyd.

**Giardino**'s starting annual salary is \$165,000 with a \$600 per month car allowance, according to his contract. "This facility is a great facility," **Giardino** said. "I am very proud to be the executive director here. "We're just going to get back to where we were and even better."

## Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **Michael A. Giardino** is listed below.]

Daily Messenger (Canandaigua, NY) October 14, 2017

IN BRIEF ROCHESTER Airport director leaving for Virginia

Author: Unknown

Greater Rochester International Airport Director **Michael A. Giardino** is leaving to serve as the executive director of an airport in Virginia. **Giardino**, who will be the new executive director of the Newport News/Williamsburg International Airport in Newport News, has been the director in Rochester since 2012.

In a statement, Monroe County Executive Cheryl Dinolfo thanked **Giardino** for his service, applauding his work on the airport's new renovation project. She also named Airport Deputy Director Andy Moore as the new Interim Airport Director, effective Oct.30.

#### Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

Victor Post (NY) August 18, 2017

#### Victor-Farmington Rotary discuss aviation programs

Author: Messenger Post Media

Victor-Farmington Rotary Club's first meeting in August featured an extended two-part program involving operations at Rochester International Airport and Honor Flight Rochester. **Michael Giardino**, director of aviation operations, discussed the current renovation project underway at the airport. **Giardino** had a 26-year career in the U.S. Navy as a naval aviation officer. In his last assignment, he was the executive officer at the Naval Air Station in Key West, Florida. Joining him during the presentation was Jennifer Hanrahan, director for marketing and public relations. The airport recently received a \$40 million grant under the state's Upstate Airport Economic Revitalization Competition Program. The \$40 million will help fund the cost of the renovation program estimated at \$54 million. To qualify for the money, the project must be completed by the fall 2018. Rochester International Airport is a small hub airport that houses operations for seven commercial air transportation companies. It serves as a component of the air transportation network connecting western New York to other parts of the country and the world.

The improvements will include improved landscaping, lighting, wayfinding signs and a new Smart Phone Lot with better user accessibility. The new lot will be located before travelers approach the airport terminal, and will eliminate unnecessary driving on circular airport roads. A large LED display will be installed with flight information. Other improvements include an improved security screening process, improved passenger lounge seating, more access for charging electronic devices and improved food vending capabilities. Renovation plans include a new canopy to provide protection from inclement weather to passengers traveling between the parking garage and the terminal. In the second segment of the meeting, Richard Stewart, president of Honor Flight Rochester; and Larry Strassner, events director; spoke to Victor-Farmington Rotary about the program's history.

Honor Flight started in 2005 in Springfield, Ohio, to honor American veterans for their service to the country. Six small planes departed from Springfield to Washington, D.C., with 12 World War II veterans to see the memorial to their sacrifices. The program has expanded to 132 regional programs. The Rochester program was established in 2008. It is an all-volunteer organization that depends on public support to sustain its program. The program has expanded to include veterans of the Korean War, and will eventually include Vietnam-era veterans.

Since its inception, the Rochester program has honored 2,588 veterans with flights to Washington, D.C. They travel Saturdays and return Sundays. The Rochester program is one of nine programs in the state; it is the only one that includes an overnight stay in Washington, D.C. As part of their experience, the vets visit memorials to their service, including Arlington National Cemetery and the changing of the guard at the Tomb of the Unknown Soldier.

## Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

Associated Press State Wire: New York (NY)

December 30, 2016

#### Threats, abandoned bags prompts closure of Rochester airport

Author/Byline: Unknown

The Greater Rochester International Airport was briefly shut down after bomb threats were received and two unattended bags prompted law enforcement to respond. Roads leading into and out of the western New York airport were closed for two hours Thursday after "specific threats" were made and the bags were discovered.

Monroe County sheriffs deployed dogs to search the airport while robots inspected the suspicious bags.

Sheriff Patrick O'Flynn says roads were reopened and activity resumed at the airport shortly before 4 p.m. after the bags were determined to be safe. The belongings turned out to be abandoned luggage.

Airport director **Michael Giardino** says the airport remained open for flights throughout the investigation and there were minimal delays.

O'Flynn declined to provide specifics regarding the nature of the bomb threats.

#### Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

Rochester Business Journal (NY) September 21, 2016

#### Airport gets \$40 million grant for improvements

Author: Velvet Spicer

Greater Rochester International Airport has received a \$40 million grant from the state for revitalization. Gov. Andrew Cuomo was in town Wednesday to announce that Rochester had won the full amount it applied for as part of the Upstate Airport Economic Development and Revitalization Competition, announced in June.

The \$200 million program allowed 74 eligible upstate airports to apply for grants of up to \$40 million each. Sixteen airports applied for funding. Cuomo also was slated to visit Elmira/Corning Regional Airport to announce funding there.

Rochester's proposal was put together by a team of individuals from the airport and local engineering and architectural firms, including airport director of aviation **Michael Giardino**. Rochester's full proposal requires \$63 million in funding, with \$23 million coming from airport and county sources.

In his announcement Wednesday, Cuomo noted that for many years Upstate New York was in decline. "There was a negative synergy. We were losing businesses," Cuomo said, noting that the economy has become more positive. Cuomo said that in today's economy, the single most important asset is the airport, because it is the front door of the city. "It's about the airport and the amenities," Cuomo said. "People expect the level of amenities they have in other airports."

Rochester's airport transformation will include a number of new technologies, as well as safety and security features. The plan calls for accessibility features with a particular focus on the deaf and hearing impaired community. Lighting and color will play a role in the airport's makeover.

The proposal calls for a curvature of the terminal and more windows for better visuals throughout the concourse. **Giardino** and his team also plan to build a canopy over the roadway between the parking garage and the terminal and move the cell phone lot so that it can be accessed prior to arriving at the terminal. "You have proposed a \$63 million transformation plan that is going to take the airport from an airport of yesterday to an airport of tomorrow," Cuomo said during the announcement. "That is going to make your front door a state-of-the-art front door where you have as great a welcome area to attract new business and new people as any city in this country."

#### Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

https://www.democratandchronicle.com/story/news/2016/01/27/clock-nations-never-took-off-airport/79421046/ January 27, 2016

# Clock of Nations never took off from airport It was supposed to have gone to Golisano Children's Hospital, but things changed.

Author: Marcia Greenwood

In 2008, as Midtown Plaza prepared to close, its centerpiece for nearly 50 years — the Clock of Nations — was relocated (after being cleaned, painted and repaired) to the Greater Rochester International Airport.

An icon of childhood for many here, "our fabled timepiece" only was supposed to stay at the airport until 2012 and then move to its permanent home: Golisano Children's Hospital. But as early as 2009, hospital officials began questioning whether the clock — whose 12 displays open on the hour to reveal mechanized, internationally themed dioramas — would fit in with expansion plans. And on Wednesday, a hospital spokesman said the facility decided a while ago not to take it.

So it remains at the airport, beyond security checkpoints, where it can be seen only by ticketed passengers. Despite the fact that the airport was obligated to host the clock for just three years, airport director **Mike Giardino** says there are no plans to move it elsewhere: "It's an artifact and near and dear to a lot of people, including myself," he said. "I grew up in Rochester. It's a treasure. We're not walking away from our responsibility to care for the clock and display the clock."

## Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

Rochester Business Journal (NY) November 13, 2015

#### Taking the airport to new heights

Author: Velvet Spicer

Navy veteran **Michael Giardino** is director of the Greater Rochester International Airport. (Photo by Kimberly McKinzie) As a child, **Michael Giardino** spent a lot of time at Greater Rochester International Airport watching his father take flying lessons, unaware that decades later he would have an office on the second floor of the facility.

Although his love of all things flight-related started at a young age, it was in 1985 that **Giardino** walked away from graduate school and into a U.S. Navy recruiting office. It was an about-face that would have a resounding effect on his career, personal life and who he would become as a person and business leader. "A friend of mine said he was going to join the Navy and be a pilot and I said, 'You're a knucklehead. If you can do it, I can do it," **Giardino**, 53, recalls. "And I went to a recruiter the following Monday."

Three decades later, **Giardino** serves as director of aviation for the airport. He earned his wings and spent 26 years piloting helicopters for the Navy. "I went from a long-haired college student to an ensign in the U.S. Navy," **Giardino** recalls. "And I loved it." At the airport **Giardino** oversees 100 staff and operations of the facility, which serves nearly 2.4 million passengers annually. The airport has an annual budget of \$32 million and handles roughly 150 flights daily from its 22 passenger gates.

**Giardino** works closely with the seven commercial airlines serving passengers from here: American Airlines Inc., United Airlines Inc., Delta Air Lines Inc., JetBlue Airways Corp., Southwest Airlines Co., Allegiant Air and Air Canada. He also works with the Federal Aviation Administration and the Transportation Security Administration.

The Monroe County Airport Authority's mission is to ensure the airport provides safe, efficient and economical air transportation and it promotes economic development, trade and tourism throughout the region. **Giardino's** job is a lot like running a small community, he says. His years in the Navy prepared him for that.

#### Working at early age

Giardino's first foray into the working world was alongside his father, who owned two local dairies in Gates and Brockport. He grew up on a milk truck, delivering to local grocers and schools. After his father died in a car accident in 1973, his older brother started a general contracting business here and Giardino labored for him. "These experiences taught me a lot about hard work and small business," Giardino says. "Small- business owners have to be very good at their core business, but they also have to make sure all the administrative stuff gets done." Giardino comes from a family of entrepreneurs, including hairdressers, barbers and grocery store owners. From them he learned that working hard was to be admired and long hours

#### Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

were OK. "Quality of work speaks for itself, and your customers will come back if the quality is good," he says. After high school **Giardino** pursued a political science degree at the University of Rochester. While there, he saw an ad for a local rock band. As lead singer of Iron Angel, **Giardino** and his bandmates won the Monroe County Fair Battle of the Bands, which included a gig at the former Red Creek in Henrietta and three hours of recording studio time. "The type of music that we played, which was hard rock/heavy metal, we came to the conclusion with the owners of Red Creek that we were never going to play at Red Creek and we walked away from that," he recalls with a laugh. "But the three hours of recording time we used."

While he was working a late-night shift at a 7-Eleven store he heard Iron Angel being played on the radio. "That was very cool," he says, noting that he remains in touch with his former bandmates. **Giardino** knew that being a musician was not something he wanted to do with the rest of his life, and he also realized political science and becoming a lawyer were not going to work for him. He transferred to SUNY College at Brockport, where he earned a degree in meteorology. Upon graduation he went to SUNY Albany, where he planned to get a master's degree in atmospheric sciences.

#### Career path

Instead, he joined the Navy. While in the Navy **Giardino** flew H-46 and H-60 helicopters. Primarily stationed on the East Coast, **Giardino** also attended the Naval Postgraduate School in Monterey, Calif., in the early 1990s and from 1996 to 1997 was a flight instructor in San Diego.

In 1999 **Giardino** had an opportunity to come full circle: He flew the CH-46D Sea Knight helicopter from Norfolk, Va., to the Rochester International Air Show, where he served as a static display participant for the event. "It was great to bring a little bit of my Navy life back home to Rochester," he says. "Friends and family got to see what I did for the Navy, and my Navy buddies got to see where I came from. Who knew I'd retire years later and end up here?"

In 2001 **Giardino** graduated from the Naval War College in Newport, R.I., and then went to work at the Pentagon. He was at the Pentagon on 9/11, as well as during the anthrax scares and the Beltway sniper attacks in 2002. "I enjoyed my time in the Pentagon," he says. "I learned a lot and I worked with some great people." **Giardino** spent three years in Germany; while there, he was deployed to Afghanistan as chief of air operations for NATO. He spent time in Kabul in 2005 and in 2006 served as the lead U.S. planner in Kandahar as the U.S. was transitioning the base to a NATO base.

While in Kandahar, **Giardino** began thinking about what he would do when he retired from the Navy. At the base he learned how to run a community—from power, water and sewage systems to how to house people, feed them and do laundry. When he returned to Ramstein, Germany, **Giardino** negotiated orders to be the executive officer at Naval Air Station Key West. His four years as second-in-command in Florida further prepared him for his job at GRIA, he says. **Giardino** oversaw an airfield, two marinas, a port facility for large Navy ships, base housing for more than 300 units and recreational facilities for families, among other things. "It was like being the city manager of a small city," **Giardino** says. "That's when I said I think municipal

## Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

government is what I want to do." When he retired in 2011, **Giardino** began looking for municipal opportunities. "I put out about 100 cover letters and resumes, and the Village of Brockport answered my call," he says. **Giardino** served as manager/treasurer in Brockport until taking the job at the airport in 2012. "I would say overall the military experience rounded me out tremendously. And it also allowed me to explore things I never thought I'd explore," he says. "So it really did give me an education and it worked for me. I know it doesn't work for everybody. But the military did wonders for me."

#### Coming to county

When **Giardino** joined the airport it was on the heels of former director Susan Walsh's resignation, following a charge of driving while intoxicated. Walsh had replaced David Damelio, who had resigned in January 2011 following reports of misspending county money.

Since joining the organization, **Giardino** says non-airline revenue is up, while expenditures are down. A few years ago total budget for the airport was \$34 million. In three years the airport has saved the airlines more than \$4 million, **Giardino** notes. "We try to keep their cost per (passenger boarding) down so they make more money per passenger and, hopefully, add more flights," he explains. "It's one of the reasons why, in a contraction environment, we were able to retain flights and recently add Allegiant."

Airport revenue comes from an array of sources, **Giardino** says, including non-aeronautical areas such as parking, car rental concessions, land rent and other items. Parking contributes \$6.5 million annually to the airport's budget, while car rental and other concessions add up to some \$5 million. Aeronautical revenues contribute roughly \$16 million to GRIA's budget. Landing fees add some \$7.5 million, while terminal fees, which include the ticket counter and gates, add up to another \$5.5 million.

The airport receives \$4.5 million per year in FAA entitlement grants for airfield upgrades and improvements, based on commercial airline activity. The airport is not funded through tax dollars, **Giardino** says. The airport recently signed three-year lease agreements with some of its airline partners, including Southwest and JetBlue, and has received commitments from others, which means the airlines will continue to operate out of the Rochester airport. A 2011 study by the state Department of Transportation shows the local airport is responsible for creating and sustaining 10,000 jobs, directly and indirectly, while contributing \$800 million to the local economy each year.

The airport, which was built in 1927, has 58 outbound flights and 58 inbound flights daily. That likely will not increase without effort from the community, in particular the business community, **Giardino** says. "Business travel is most of who travels here. And airlines look at business travel because they pay more money per seat," he says. "It's very important that the business community use their airport because if you don't, you'll lose service."

If there are fewer than 100 people on a flight, the region runs the risk of losing that flight. And the only flights out of Rochester consistently running with that many passengers are flights to

## Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

Florida, which typically are leisure flights, **Giardino** says. Southwest recently pulled two flights out of Rochester to the Midwest that were underperforming, and replaced them with one flight to the Baltimore/Washington area, where they have better connectivity and fewer delays. "We must use the service that we get or we're going to lose it. If you like your airport, use your airport, keep your airport," **Giardino** says. "There are a lot of things we can do at the airport, like keep costs low and be a strong advocate for the community, but the community also has to do their part."

A couple of decades ago airfare out of Rochester was one of the highest in the nations, **Giardino** acknowledges, so many people got into the habit of driving to Buffalo for flights. In recent years, however, Rochester flights have been below the national average. "We stress what we offer: We're convenient, we're just around the corner and we're affordable. Our parking rates are the lowest in the state," he says. **Giardino** says the biggest challenges he sees in his job are airline consolidations and the reduction in the frequency of flights.

In addition, adds airport operations manager Timothy Woolston, the changing regulatory environment can be challenging. "Are we meeting those expectations that they have for us and staying current with industry changes? The changes over the last 25 years have been astronomical and trying to keep up with that is a challenge," Woolston says. But it is a fun challenge, he acknowledges.

Airport fire chief Todd Bane has been with the organization 34 years and says the face of aviation has changed dramatically in the last three decades. FAA regulations can be challenging, but security also is an issue, he says. "Security is a major challenge for the airport," Bane says. "There are always people looking to do bad things. They look at aviation as a prime target, so we always have to be ready."

Despite the challenges, the working atmosphere is somewhat relaxed, and employees describe the environment as family-like. "I think it's an enjoyable atmosphere. We try to create an atmosphere where people want to come to work," Woolston says. "It's non-adversarial. We try to keep it light." Adds Bane: "It's a great place to work. Most everybody knows everybody else. It's a great team here at the airport."

Teamwork is a must, **Giardino** says. "It's absolutely collaborative. I always point to the binders on the credenza," he says, pointing to several thick manuals. "We have rule books. But it's the team that makes that work." **Giardino's** management style reflects his beliefs in teamwork. He is hands-on when necessary, but he also walks around a lot, observing. **Giardino** does not micromanage, Bane says, but you can tell he has a military background. "He will tell you what to do. There's an assignment and he expects you to complete it," Bane adds. "He allows you to get your work done in the way that you see fit."

**Giardino** is a "chain-of-command" type of manager, Woolston adds. "He allows his subordinates to do their jobs and he guides them when they need guidance," Woolston says. "When we have questions or are looking for direction we can go to **Mike**. But he really puts it

## Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

back to us as department heads to manage our departments within the confines of the regulations." What makes the airport successful, Bane says, is having the right person leading it. "This guy came to us understanding what it takes to run an airport. An airport is like a small city or town," Bane says. "We have a person that's leading the airport now that gets it." The best part of his job is the people, **Giardino** says. "This has got to be one of the best staffs I've ever worked with in my entire life, and I've worked with some great people," he says.

**Giardino** says his passion and integrity are his strengths, and he learned patience from his first flight instructor, Capt. Billy Young, whose call sign was Stump. "I had never flown before. We got in the air and I looked around. And I kept looking around," he recalls with a laugh. "Because for the first time in my life I was flying above treetops with this bubble canopy and I'm not in an aircraft where you're just peeking out a window. And he's just screaming over the intercom, put the gear up, get the flaps up, all the things I was supposed to do real fast. He had to be the most patient man." The advice he would give other business leaders is knowing the importance of patience. "Doing it right the first time is fast enough," he says. "You don't get many second chances in the aviation business."

#### At home

**Giardino** was born in Rochester and raised in Charlotte. He lives there with his wife, Janice. He has two sons, Kyle, 26, and Dominic, 21. Another son, Mitchell, died when he was 8 months old of a rare, congenital disorder. His favorite family memories are the births of all of his children and his wedding, he says. His musical gene was passed on and one of his sons is a student at the Eastman School of Music.

Long-time friend Gregory May says family is important to **Giardino**, as is the church and his work with Veterans Outreach Center Inc. "When he was in the military he was always doing charity for veterans," May says. "It's very important to him to be part of the community." **Giardino** also is involved with the Rochester Rotary Club, which runs the Sunshine Campus in Rush, a fully accessible residential summer camp that helps children with paralysis and other physical challenges and their families. May calls his friend "dynamic." "I think that he is very intense on everything he does. He's always been that way," May says. "Whatever he was doing at the moment was the greatest thing in the world. Whether that's being a friend, or studying meteorology in college or flying helicopters, that was always the greatest thing in the world." While **Giardino** is humble, he has a few accomplishments he particularly is proud of.

In 1999 Hurricane Floyd hit the East Coast with a vengeance. When it struck North Carolina it caused billions of dollars in damage and widespread flooding where Hurricane Dennis had hit just weeks earlier. **Giardino** was part of the rescue efforts that saved hundreds of lives. "I got 110 rescues after Hurricane Floyd. That was pretty satisfying," he says. "Pulling people off of rooftops. That was probably the best day of flying ever." And though he is proud to have earned his Navy wings, one thing takes precedence. "Husband and father are No. 1," **Giardino** says. "Family is No. 1, all the time,"

#### Michael Giardino

## Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

Times Herald-Record, The (Middletown, NY) April 26, 2015

#### Tax relief could boost Stewart

Author: Judy Rife

After a decade of lobbying the state Legislature, the general aviation industry has finally secured the tax relief that it believes will restore New York's competitiveness – and bring lost jobs back to its airports. "What this legislation does is level the playing field with Connecticut, Massachusetts, New Jersey – the states that have cannibalized our business," said **Mike Giardino**, president of the New York Aviation Management Association and director of aviation at Greater Rochester International Airport.

The bill that Gov. Andrew Cuomo signed April 13 eliminates state sales and use taxes on the purchase of general aviation aircraft – planes used for non-commercial purposes - and any machinery or equipment installed on them as of Sept. 1. State sales taxes on their maintenance and repair was eliminated in 2004.

Previously, only commercial aircraft – planes used for passengers, cargo and charters – were exempt from these taxes. "This is going to make a measurable difference in New York, where we are so highly taxed, so highly regulated," said Maureen Halahan, president and CEO of the Orange County Partnership. "People are doing happy dances about it."

Halahan said she expects the tax relief will bring new tenants to Stewart International Airport and encourage current ones to expand. The airport is already home to Cessna's Citation Service Center, GE's corporate fleet and two fixed-base operators, Atlantic Aviation and Airborne Aviation, that supply the gamut of support services to plane owners, from hangars to repairs to fuel. "Over the next year or two, Stewart will grab some of the low-hanging fruit - planes that aren't location-sensitive," from Teterboro Airport in New Jersey and Waterbury-Oxford Airport in Connecticut, said Fritz Kass, the Stewart representative to the Aircraft Owners and Pilots Association. "But they'll have to build more hangars first, so this will mean construction jobs, too."

Tenants at Teterboro, in particular, will be attracted to Stewart's wide-open spaces and lower operating costs and to the county's lower cost of living, predicted Kass, explaining that corporate planes bring their crews with them. Teterboro, a purely general aviation airport, has been at capacity for years. Like Stewart, it is operated by the Port Authority.

**Giardino** said the state has lost more than 700 general aviation aircraft over the past decade, most of them to low-tax or no-tax neighbors who promoted themselves as cheaper places to buy and base planes, yet still close enough to serve the New York market. Prices of single-engine planes can range from \$16,000 to \$300,000, and of twin-engine jets, from \$645,000 to \$65 million. But the loss of a business jet, according to a state Department of Transportation study, also translates into the loss of an average of five on-airport jobs and \$1 million a year in

## Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

economic activity. "Everybody uses the word 'jobs,' but we like to use the word 'careers,' because jobs such as pilots and mechanics really are career paths,' said **Giardino**. Mechanics, for example, have to be Federal Aviation Administration-certified before they can touch a plane, and then they earn between \$58,000 and \$95,000 a year. "Stewart has 5,000 full- and part-time jobs, maybe 2,000 of them at the Air National Guard, all good jobs, and it can support more," said Kass. "People don't see what a huge economic thing it is, because it doesn't have a lot of air service, but that's also going to change in a few years." The legislation, despite its parallels to the state's other tax-relief programs for businesses, languished for years, in part because some lawmakers perceived it as pandering to rich people rather than promoting economic development.

In what **Giardino** called "a beta test," NYAMA finally convinced them to waive state sales taxes on maintenance and repair of general aviation aircraft for five years in 2004. The tax relief stopped enough planes from leaving the state for pricey tune-ups to produce a 64 percent increase in local and state sales tax revenues from aviation maintenance and repair-related businesses by its third year. The increase, documented by the state Department of Taxation and Finance, resulted in the exemption becoming permanent.

The FAA subsequently reported an increase of 23 maintenance and repair businesses and 686 new aviation-related jobs in New York. "We are highly confident this tax relief will quickly become revenue neutral, and then revenue positive, too," said **Giardino**. "The results will be tangible. The end game will show the payoff is there."

## Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

Democrat and Chronicle October 6, 2014

#### Giardino to lead statewide aviation group

**Michael Giardino**, director of aviation at the Greater Rochester International Airport, has been elected president of the New York Aviation Management Association. The organization represents more than 75 members in the aviation field. **Giardino** previously served as the group's vice president.

In a news release, **Giardino** said the group would continue to urge state leaders to pass the Aviation Jobs Act, a bill that would exempt general aviation aircraft purchased in New York from sales and use tax. "We will lead and advocate for our members with respect to understanding current aviation issues such as funding of contract towers, commercial airline pilot shortages, and the impact of unmanned systems," **Giardino** said. Monroe County Executive Maggie Brooks appointed **Giardino** in 2012.

#### Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

Rochester Business Journal (NY) December 28, 2012

#### Delta Air Lines soars to the top in local market

**Author: Thomas Adams** 

Delta Air Lines Inc. is the new heavyweight at the Greater Rochester International Airport, having surpassed longtime leader US Airways Group Inc. for the last three years and added a \$160 million New York City hub that benefits local travelers. In addition, Delta two weeks ago announced a \$360 million investment in London-based Virgin Atlantic Airways Ltd. to provide nine flights daily to England from the New York City area. International passenger traffic at the Rochester airport was up 14.3 percent from 2003 to 2011, according to a Brookings Institution study released in October. GRIA ranked 57th among 90 metropolitan airports in the nation with 174,527 international passengers in 2011. It was 59th in 2003 with 152,691 passengers.

Latin American and Caribbean destinations accounted for 35.9 percent of Rochester's international traffic in 2011, with Western Europe next at 33.1 percent, the study found. More than half of Rochester's international travelers used the New York City area as a connecting point last year, with 52 percent transferring in New York City, northern New Jersey or Long Island, Brookings found. Metropolitan Chicago ranked second for local global travelers at 24 percent, the study found. Metro Atlanta was third at 22 percent.

#### This year

Delta carried 26.7 percent of passenger traffic at the Rochester airport during the first 10 months of 2012, data compiled by GRIA shows. United Airlines Inc. was second at 21.7 percent as of Oct. 31. United's total includes flights by Continental Airlines Inc., whose acquisition by parent UAL Inc. was completed in March. AirTran Airways ranked third at 17.8 percent; US Airways fourth at 17.4 percent; JetBlue Airways Corp. fifth at 11.1 percent; American Eagle Airlines Inc. sixth at 4.9 percent; and Air Canada seventh at 0.4 percent. Delta led in Rochester traffic in 2011 with nearly 1.21 million passengers, or 24.2 percent of the airport's total enplanements. The Atlanta-based airline also was first in 2010 with nearly 1.27 million passengers, or 22.8 percent. US Airways had been first in Rochester in the eight preceding years, though its dominance steadily waned from enplanements of nearly 1.2 million, or 32.3 percent of total traffic, in 2002. Delta seems poised to remain No. 1 here, with two hefty investments in the last 12 months.

In September 2011, the airline announced plans to establish a hub at New York's LaGuardia Airport, announcing 100 new flights and 29 new destinations last December. The itinerary included four direct flights daily from Rochester, which commenced last March. Delta also expanded service in Buffalo and Syracuse. "We've always had a significant presence in Rochester," said Gail Grimmett, Delta's senior vice president for New York. "We serve Rochester from Detroit, Minneapolis, Atlanta and from some of our other hubs. "The Upstate New York markets are important to the Delta system. Now we're able to serve it from LaGuardia as well, but there is significant business in Upstate New York." The \$160 million LaGuardia hub was conceived following an agreement between Delta and US Airways in which Delta acquired

#### Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

132 LaGuardia slot pairs in exchange for US Airways' acquisition of 42 slots at Reagan National Airport in Washington, D.C. That deal was reached in August 2009. A slot essentially reserves space for one round-trip flight. Slot controls are in effect at LaGuardia, John F. Kennedy International Airport and Newark Liberty International Airport in the New York City area and at Reagan National. They are designed to help the Federal Aviation Administration manage congestion by limiting flight departures and arrivals each hour. "The challenge with New York City overall, and growing in New York, is that slot control is very constrained in terms of how you can grow," Grimmett said. "If you want to be a preferred carrier-particularly out of LaGuardia, which is the businessman's airport of choice-you really want to serve all of your top business destinations. "The preferred carrier should be No. 1 or No. 2 on those top 50 business markets. For us at the time, before we expanded, it's hard to be No. 1 or No. 2 when you don't serve the top 50 business destinations."

#### Switch to jets

As part of Delta's \$100 million terminal expansion at LaGuardia and the implementation of non-stop flights to upstate cities, it replaced US Airways' turboprop aircraft with 70-seat Canadair Regional Jets. "We don't have any propeller planes, so it wasn't a choice of swapping out one for one," Grimmett said. "That left us to decide whether the 50- or 70-seat regional jet was the right aircraft for the market. "In Rochester, because of the demographics of the people who fly us and the demand we knew we had, we knew the 70-seaters would do very well in that market." The regional jets have wireless networking technology and the option of first-class seats. The larger planes allow Delta to provide 260 seats a day from Rochester to New York City, Grimmett said. "The hub of the state is important from an economic driver perspective," she said. "When you look at the evolution of what's happened in Syracuse, Buffalo and Rochester, the business development that's occurred in all three markets has been significant."

Delta announced a second big investment two weeks ago, a \$360 million stake in London-based Virgin Atlantic Airways Ltd. to provide nine flights daily to England from the New York City area. New York City is a competitive market for airlines, Grimmett said, with at least 16 carriers servicing the metropolitan area. "There's over \$14 billion of revenue that the industry generates here in New York (City)," she said. "It is a huge market, and one that is critical to any carrier who wants to be a preferred carrier for both business and leisure traffic." New York City is now Delta's No. 2 hub, behind its home base in Atlanta. "The LaGuardia slot swap, in particular, really filled out our portfolio in New York," Grimmett said. "That has always been a great international connecting hub for us. We needed something to help bolster both our market presence and our capability to serve the market on the domestic front. "Part of that is selling travelers on the fact that they can get from Rochester to six continents very easily through the air service you have there."

Delta has doubled its service from New York City to upstate cities since 2009, representatives said, and has non-stop flights from Rochester to 270 cities. It has increased its total seats in Rochester by 28 percent this year and increased seats to New York City by 122 percent. "We knew where and how we wanted to expand and why the routes we wanted to serve were valuable to us," Grimmett said. "It's not just being a part of a specific city or area. It's being part of the

#### Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

entire state." Delta schedules 17 flights daily from Rochester, 22 from Buffalo and 14 from Syracuse. Albany is not part of the LaGuardia hub. "We do serve Albany from our other hubs," Grimmett said. "There wasn't the demand for Albany and LaGuardia that we expected. There were people that wanted it, but I think it's easier to take the train or drive."

US Airways was the most popular airline in Rochester from 2002 to 2007 and finished barely ahead of AirTran in 2008 and 2009. US Airways and AMR Corp.-parent of cash-strapped American Airlines and its regional partner American Eagle-are negotiating a possible merger. Combined, the two airlines accounted for 22.3 percent of passenger traffic at GRIA through October. Business trips account for 55 percent of the Rochester traffic, with leisure traffic at 45 percent, said **Michael Giardino**, the Rochester airport's director of aviation.

Delta operates seven of GRIA's 11 daily non-stop flights to New York City, he said. "That's significant," he said. "Delta meets the demand of the business traveler. New York is our No. 1 destination. They have four flights to Atlanta, but Atlanta has traditionally been a strong market for Delta, obviously, as one of their hubs."

Kennedy International is the top destination for Rochester departures, **Giardino** said. Orlando International Airport in Florida is second, and Atlanta's Hartsfield-Jackson International Airport is third. LaGuardia is seventh. The agreement between Delta and Virgin Atlantic gives Delta the 49 percent stake held by Singapore Airlines Ltd. The Virgin Group Ltd., owned by Richard Branson, holds 51 percent of the shares. The new joint venture, expected to be implemented by the end of 2013, will produce 31 round-trip flights between North America and the United Kingdom, the airlines said. London's Heathrow Airport will accommodate 23 of the flights.

#### Terminal construction

At GRIA, meanwhile, work continues on a \$4 million terminal upgrade. "That's not huge when you're talking about airport dollars, but it's a big deal for Rochester," **Giardino** said. The project commenced during the summer and is scheduled for completion in the spring. It includes new ticket counters and a new facade on the upper west side of the building. "We're doing significant work," **Giardino** said. "Our airlines partnered with us to give us ideas for their ticket kiosks and, basically, what the front door looks like and how we present ourselves when customers walk through the door. "They've been very patient during the construction phase. People are coming through the door, and the first thing they face are walls of plywood or a floor that's torn up, or bare walls and hanging wires. It doesn't look great now, but I think the place is going to look great in the spring."

## Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

[CB&A Note: We normally do not include articles from blogs, as they are opinion pieces. But since this article is question and answer based, we included it.]

https://blog.suny.edu/1898/alumni-profile-meet-michael-giardino/ June 13, 2012

Alumni Profile: Meet Michael Giardino

Author: Megan Wolszczak

Alumni Profiles Power of SUNY Wellness & Success

SUNY Brockport alum **Michael Giardino** was recently appointed director of aviation for Monroe County's Greater Rochester International Airport. **Giardino**, a retired US Navy Commander, was excited to share with us some great stories and details about his SUNY education and the pathway it provided to his success.

How did your SUNY education help you prepare for your military experience? First and foremost, I would not have qualified for a officer's commission without a bachelor's degree, so you could say that my SUNY degree meant everything to me as far as preparing me for the military. However, in practice, the study habits that I had to developed in college were instrumental to my success in office candidate school and flight school. I could name a few SUNY Brockport professors (but I won't), who knew the right time to turn up the heat a little bit, and that paid off a great deal because the competition in flight school was pretty tough. When I studied meteorology at SUNY Brockport, I learned that knowing the physics, math, and chemistry of the atmosphere very well improved my ability to understand and forecast weather. But I also learned that the forces that determine our weather are fluid and extremely dynamic and being wrong was part of the business. We had a weather forecasting contest every semester at SUNY back in those days. Developing thick skin was part of that contest because one SUNY grad, who shall remain nameless (but now runs the weather office in Buffalo), would say things like, "you're out of your mind" or "you're crazy" when critiquing another students forecast. We had some good debates and it was a positive learning atmosphere always based on fact and science, but enough room for a little bit of 'gut feel'. Whether in the Navy, other government enterprise or private business, to succeed, you have to be as well-informed as you can be, sometimes make decisions from your 'gut', learn from your mistakes, and move to the next problem (or weather forecast) when it's all said and done.

#### What is a typical day at work like for you?

Lucky for me no two days are the same at the airport and in County Government. The airport is a dynamic environment and that suits me just fine. That said, I am a creature of habit and routine. I succeed and fail by my ability to manage my time and calendar. I firmly believe in having a plan. As a Naval Aviator and US Navy Officer I relied heavily on policies, procedures, manuals and instructions. Well crafted documents and checklists are extremely useful tools to ensure consistent and safe operations in any organization, not just on the bridge of a ship or in the cockpit of an aircraft. At the same time, leaders and managers have to have the skills and flexibility to change course and react to "life". So to answer your question, I am just as

## Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

comfortable with a day of staff meetings and office visits as I am with leaking pipes, a business meeting out-of-town or unexpected snowstorms that slow down (and hopefully don't shut down) airport operations. I do try to get out in the airport terminal at least once a day as well as tour the grounds by foot or car once a day too.

What was your involvement with any clubs/student organizations on campus? I was active socially within the Department and we had a chapter of the American Meteorological Society. Outside of that, I worked a job in Rochester and, sadly, I commuted from Rochester. If I had it to do over again, my living arrangements would have been on or near campus. I came to Brockport after two full semesters at the University of Rochester, so I missed out in that respect.

How does it feel to be one of the few Monroe County airport directors with aviation experience? It certainly helps that I understand the aviation side of the operation, but aviation is not all we do. We have to run like a business. That means we have to generate revenue, not just airline revenue but non-airline revenue. Non-airline revenue keeps the costs low for us and thus reduces the amount we have to charge the airlines for operating here. For the airlines, lower operating costs means lower fares and more frequent flights and that's good for Monroe County and the surrounding region. Therefore, I am fully involved in marketing this place. Not just advertising but coming up with ideas for attracting businesses that may want to operate at or near the airport. We are in a perfect geographic location and we are THE transportation hub for a 9 county Region. The airport director must also be cognizant of security and law enforcement procedures, facilities management, environmental compliance, construction planning and execution, public relations and customer service. Having aviation experience helps and aviation is why we exist, but aviation is just one piece of the puzzle when it comes to the overall operation.

What do you think you can bring to the Monroe County airport that your predecessors have failed to?

The former directors should be commended for their work. Since I left Rochester in 1985, the improvements to this airport are remarkable. The terminal project, service roads and parking area are the most obvious to the naked eye, but what the traveling public does not see are the tremendous improvements to the runways, taxiways, ramps and airfield lighting as well as many other safety upgrades on the entire property. The staff here are top-notch professionals and well-respected around the country for their expertise.

What advice do you have to share with SUNY students?

Work hard (now and in the future), have a passion for something, and then pursue it. Take a chance, manage the risk, and execute. Setbacks WILL come along. It's the response to the setback that is what is important. Having fun and working are not mutually exclusive.

We'd like to thank **Michael** for his time and help. His passion is obvious and we wish him the best of luck in his new job.

#### Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

Westside News Inc April 8, 2012

#### Brockport's proposed budget calls for no change in tax levy for 2012-13

Author: Kristina Gabalski

The Village of Brockport's 2012/2013 tentative budget calls for no change in the tax levy. Appropriations total \$4.7 million, down from \$5.17 million (projected) in the 2011/2012 budget. During what was his last regular village board meeting before he begins his new job as director of the Greater Rochester International Airport, Village Manager/ Treasurer **Michael Giardino** presented the budget to trustees. **Giardino** said areas with the greatest jumps in cost include health insurance -up 18 percent this year and expected to increase another 20 percent in January 2013. He noted that fuel and petroleum costs also continue to increase.

At the end of the current fiscal year, **Giardino** says he expects an unreserved fund balance of \$365,000. "Employee benefits make up a large portion of the budget," **Giardino** said. The plan includes a three percent salary increase for both union and non-union full-time employees. The Police Department allocation is increased from \$1,155,715 to \$1,181,357 in the 2012/2013 tentative budget. Also included is \$15,000 for maintenance of the Smith Street Bridge and a \$150,000 unallocated appropriation (contingency), **Giardino** said.

The budget includes no capital improvements or funding for celebrations. A \$215,000 deficit in the tentative budget "will be mitigated through use of fund balance," **Giardino** said. The water budget includes no rate increase, he said.

Mayor Connie Castaneda told the board following the presentation that the village's revenue streams are limited. "The largest part of our budget is employee costs – 71.8 percent," the mayor said, and added that the only way to cut appropriations is "by the cutting of staff and limiting benefits." "We are making no long-term plan, the fund balance is decreasing annually," she said. "We are still a village in fiscal distress."

Trustee Scott Hunsinger questioned **Giardino** as to whether the use of \$215,000 from the fund balance was "fiscally responsible." "It would be prudent to use no more than ten percent of the current fund balance," **Giardino** responded. He noted the village will have about \$1.2 million in fund balance at the end of this fiscal year. During his report, Trustee Hunsinger said the budget is a "living document. Over the next couple of weeks I hope the issues we bring forward will be looked at non-politically." A public hearing on the budget is set for 7 p.m. Tuesday, April 10 at the Middle School Auditorium.

#### Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

US Fed News (USA) February 22, 2012

# MONROE COUNTY EXECUTIVE BROOKS TAPS FORMER U.S. NAVY PILOT, OFFICER GIARDINO TO SERVE AS AIRPORT DIRECTOR

The Monroe County Executive issued the following press release: Monroe County Executive Maggie Brooks announced the appointment of **Michael A. Giardino** to the position of Director of Aviation for Monroe County's Greater Rochester International Airport. **Giardino**, a retired United States Navy Commander, possesses over two decades of military experience in the fields of aviation program planning, emergency preparedness, and community relations, in addition to financial, facilities, and human resources management. **Giardino's** appointment follows an intensive national search process that yielded more than 100 applicants.

"With over twenty years of experience in aviation operations, financial management, and emergency preparedness, Commander **Michael Giardino** is both eminently qualified and tremendously prepared to serve Monroe County as Director of Aviation," said Brooks. "Commander **Giardino's** breadth of knowledge and expertise, accumulated over a decorated career of service in the U.S. Navy, certainly make him a tailor-made candidate to lead our airport. In light of his impeccable qualifications, I am proud to entrust **Michael Giardino** with the task of building upon the Greater Rochester International Airport's already strong reputation as one of the best mid-sized airports in the nation."

Prior to his retirement in 2011, **Giardino** served as the Executive Officer and Deputy Commander of Naval Air Station Key West, Florida, which supports operational and readiness requirements for the Department of Defense, Department of Homeland Security, National Guard units, federal agencies, and allied forces. As the station's second-in-command, **Giardino** served as de-facto Chief Operating Officer and Chief of Staff, directing operations of the 7 annex, 6,300 acre facility which supports 39 tenants; houses 5,500 employees and family members; receives 20,000 visitors annually; controls nearly 100,000 general aviation/military flight operations per year; and operates on a \$55 million annual budget. The Air Station also has the exact same regulatory oversight (FAA, Homeland Security, OSHA) as civilian airports.

Before accepting his post to Naval Air Station Key West in 2007, **Giardino** served as Chief of Air Operations (Kabul) and Lead Planner (Kandahar) during two deployments over the course of three years, where he supervised all North Atlantic Treaty Organization (NATO) allied command air operations in Afghanistan. Prior to his dual deployments to Afghanistan, **Giardino** held a variety of high-ranking positions within the U.S. Navy leadership, including serving as a top research analyst at the Pentagon during the 9/11 terrorist attacks and accumulating 2,540 mishap-free flight hours over the course of 26 years.

"I am honored to have the opportunity to serve Monroe County Executive Maggie Brooks, the Monroe County Airport Authority, and, most importantly, the citizens of our community as the next Director of Aviation for Monroe County," said **Giardino**. "The military provided me with

#### Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

the opportunity to develop 26 years of effective problem-solving experience in some of the most complex and demanding environments on earth. I hope to bring those experiences to my new role as Monroe County's Director of Aviation and look forward to expanding upon the airport's exceptional standing as our community's 'Gateway to the World' in the days to come."

"I would like to thank Monroe County Executive Maggie Brooks for carrying-out an exhaustive and thorough search for a highly-qualified Airport Director - a process which yielded an outstanding candidate like Commander **Michael Giardino**," said Monroe County Airport Authority Chairman James G. Vazzana. "The Monroe County Airport Authority Board looks forward to working in partnership with Commander **Giardino** to continue the record of exceptional operational success and customer satisfaction that the airport has built over the past several years."

"Michael Giardino is the ideal candidate to serve as Director of Aviation for Monroe County," wrote Admiral James G. Stavridis, U.S. Navy; Commander of United States European Command in a letter of recommendation. "He has trained and worked in aviation for over 26 years, he has experience in running multi-million dollar enterprises both in and out of the military, he has worked at the highest levels of government both nationally and internationally, and he works well in a multitude of environments from the taxiway to the boardroom."

**Giardino** is a graduate of Charlotte High School in Rochester, NY. He has studied at the University of Rochester and Monroe Community College, and holds a BS in Meteorology from SUNY College at Brockport. Over the course of his service with the Navy, **Giardino** completed two graduate programs, including Information Systems Management at the Naval Postgraduate School and an MA program from the Naval War College in National Security and Strategic Studies. Upon returning to Monroe County in 2011, **Giardino** was appointed Village Manager/Treasurer for the Village of Brockport, a position he holds currently. **Giardino** is a resident of the City of Rochester's Charlotte neighborhood.

**Giardino's** appointment is subject to confirmation by the Monroe County Legislature and will be addressed in the March committee cycle and subsequently at the April meeting of the full Legislature. **Giardino** will also be subject to appointment as the Executive Director of the Monroe County Airport Authority at a future meeting of the Authority Board. **Giardino** is slated to assume his new role within 30 days as he transitions from his current position.

## Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **Michael A. Giardino** is listed below.]

Rochester Examiner (NY) February 16, 2012

#### Positive things are happening in Brockport

Author/Byline: Unknown

- 10. Leadership by Politicians and Community Members:
- \* Excellent, qualified people assuming leadership.
- \* Hiring of **Mike Giardino**, Village Manager/Treasurer, who brings a level of professionalism to the village every day.

## Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

Key West Citizen, The (FL) January 7, 2011

Jets, noise, commerce to increase - Winter brings influx of trainees, retirees Author/Byline: Adam Linhardt

Lower Keys skies will roar back to life this weekend as the previously quiet few weeks over the holidays give way to Naval Air Station Key West's busy season. Each year the North's cold, gray and snow-filled skies send many squadrons south to the Boca Chica Key base to take advantage of the clear weather.

The annual migration sends as many as 900 pilots and support personnel per day into town to eat and shop as well. "Weather up North [is] so miserable, and having been stationed up there, I know what it's like," said Executive Officer Cmdr. **Mike Giardino**, originally from Rochester, N. Y. "The squadrons can come down here and really bang out sorties and get more done in three weeks than they can in three months up North." This winter has been particularly brutal in the Midwest and Northeast, where record snows shut down airports, and freezing temperatures have made flights for one Canadian F/ A-18 Hornet squadron impossible. That Alberta-based squadron is headed to Key West to take advantage of Keys weather. "They told us it got so cold up there that the exhaust from launching just two aircraft created a fog on the airfield that is so thick no other aircraft could take off for an hour or more," **Giardino** said.

Along with many naval squadrons and their F/A-18 Super Hornets, many Air Force squadrons, possibly one Marine squadron and the famed Army 160th Special Operations Aviation Regiment, which flies helicopters, are all heading to Key West. There may also be an aircraft carrier stationed off the coast of South Florida in the coming weeks, doing its own training, but flights sometimes are diverted from a carrier to Key West for maintenance or other issues, which could translate into even more air traffic, base spokesman Jim Brooks said.

As many as four different Air Force squadrons are already scheduled to arrive in the next four weeks, he said. On the heels of "Hell Week" - the busy days between Christmas and New Year's - local businesses, particularly restaurants - can expect hundreds of military personnel to flood into town. "We have no galley on base, so all those people receive a daily food per diem (stipend)," **Giardino** said.

As the base fills with squadrons, the RV parks on Trumbo Point and Sigsbee Park are also filling with mostly retired former military personnel, Brooks said. There are about 300 RVs in town already, and that number is expected to swell to at least 500 by next week, Brooks said. "You're going to see a lot more military traffic overheard and in town for sure," Brooks said.

## Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **Michael A. Giardino** is listed below.]

Key West Citizen, The (FL) October 31, 2010

# Sailor returns home after dangerous detail in Afghanistan - BOCA CHICA

Author/Byline: Adam Linhardt

"You're the eyes and ears for the rest of the guys up there [in the turret] and it's something you take very seriously."

The recent violence coincided with recent elections as insurgents moved across Pakistan for what Woods described as their "fighting season." Woods' service in the Paktika province did not escape the attention of senior leadership, including that of Naval Air Station Key West Executive Officer **Michael Giardino**, who has completed two tours elsewhere in Afghanistan. "There are some provinces in my favorite central Asian country that aren't too bad," **Giardino** said. "Paktika, Khost and Kunar ain't them. This MA (Master-at-Arms) was on the front line." Woods' team stormed two improvised bomb areas and shut them down - a point of pride, he said.

"That's a good feeling," Woods said. "Most of our people are getting hurt by those [bombs], as well as the villagers." Woods volunteered for the mission, which scores points with supervisors, said Chief Petty Officer James Blagg. "Doing what he did reflects tremendously on his future ability to get a raise," Blagg said. "It's a tough, scary job and he raised his hand." Woods' wife, Selene, and their two children, Anthony, 6, and Mia, 3, were in Chicago and not able to meet him at the airport, but Woods credited his family for inspiring his decision to volunteer. I want my kids to be proud of my service and know that you don't always take the easy route; sometimes you stand up and make a difference," Woods said.

Woods planned to go to a Key West restaurant first thing, he said. "I'm going to Mattheessen's (4th of July Ice Cream) and get a Midwest burger and grasshopper sundae before I call my wife to rub it in a little," Woods said laughing. "That's our favorite place."

## Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

New York Daily News (NY) May 23, 2010

# **REVERSE COURSE - Marine Park golf green changes tune after rejecting kids program** Author/Byline: Simone Weichselbaum

A CITY-OWNED golf course that turned away a black golf coach who wanted to teach minority kids with special needs the sport wants a mulligan after a Daily News inquiry about the rejection. Marine Park Golf Course in Brooklyn - a 18-hole park that investigators had tied to the mob during a 2007 probe - snubbed coach Charles Lightfoot's proposal in a March 3 e-mail. Lightfoot said he never heard from Marine Park again. "I was shocked and I was disappointed," said Lightfoot, 56, head of the Advanced Lesson Academy of Golf and a freelance golf journalist. "They think golfing isn't for us," he said.

Lightfoot designed the 10-week Junior Scholarship Program to help children suffering from a range of mental disorders, from attention deficit to autism, use golf as a tool to learn how to focus. Admission is free and would be a city first if Lightfoot finds a public golf course to sign on. Marine Park was Lightfoot's first choice because it's the only Brooklyn public course with a driving range. Lightfoot said he wanted to make his classes accessible to local families. "Innercity kids need to have opportunity. They don't get to see these things," Lightfoot said.

Mel Rodriguez, whom Lightfoot tapped to be a "mentor to parents" in his new program, agreed, and is taking steps to see that his young son Emilio learns the game. The elder Rodriguez said that mastering golf at an early age can pay personal dividends later in life. Lisa Maynard, 42, and her daughter Makiya, 11, were looking forward to hitting golf balls this summer. The Maynards were heartbroken when they learned the budding program wasn't working out. "My daughter doesn't have any friends but me," said Lisa Maynard about her little girl, who suffers from autism. "She needs friends and I want to interact with other parents who understand."

The Parks Department oversees Marine Park and another dozen or so courses throughout the city. A department spokesman referred all questions about the rejection to Marine Park. Marine Park course manager Michael Watkins cited the course's "different academic golf clinics" as the reason behind the refusal in his March 3 e-mail to Lightfoot. When reached by phone last week, Watkins said he thought Lightfoot's program had nothing to do with kids. However, a reporter read him his old e-mail that said: "Being the golf professional here I appreciate any efforts to grow the game of golf especially with kids. We here at Marine Park wish you the best in locating a home for your program." Watkins then suddenly changed his old veto into a new possibility. "It wasn't a definitive no," he said, before handing the phone off to his apologetic boss, **Michael Giardino**: "If Mr. Lightfoot wants to speak to us in depth about it, we are very willing to talk to him." For his part, Lightfoot said he is open to forgiveness. "My concern is the kids," he said.

## Internet – Newspaper Archives Searches Michael Giardino

(Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **Michael A. Giardino** is listed below.]

Key West Citizen, The (FL) July 4, 2007

## **Declarations of - Independence**

Author/Byline: Traci Rork

Freedom to live

**Mike Giardino** had been working at the Pentagon for just six weeks when it happened. "Suddenly the building shook and we heard an explosion," said **Giardino**, now the executive officer of Naval Air Station Key West on Boca Chica Key.

When he looked out his window, he saw smoke and, strangely, paper flying through the air about 100 to 150 yards away. "Turned out that I was looking at the area directly above where the plane came to rest - directly below our old office space that we had vacated in July," he said.

Sept. 11 - the terrorist attack, the chaotic aftermath of gathering colleagues and fleeing from the building - that is the day he truly gained an appreciation for what life must have been like in Afghanistan under the Taliban.

"We are fortunate to have our way of life and we are thankful for those who are charged with its preservation," said **Giardino**, who recently completed two tours in Afghanistan. "Freedom is precious. Kids, especially little girls, now walk freely to school in Kabul. They play in the streets; they wave at us when we drive by."

They weren't the only ones to express their gratitude to **Giardino**. Soon after the 9/11 attacks, he was in his uniform, waiting for the subway when he locked eyes with a woman sitting on a bench. She quietly offered a simple, "Thank you." "I smiled and said, 'You're welcome.' "

Research Compiled by: Shannon Farr

Colin Baenziger & Associates



Rick J. Rudometkin

Belle Isle City Manager Candidate Report

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# Section 9

## **TABLE OF CONTENTS**

|                         | <u>PAGE</u> |
|-------------------------|-------------|
| COVER LETTER AND RESUME | 1           |
| CANDIDATE INTRODUCTION  | 7           |
| BACKGROUND CHECKS       | 15          |
| CB&A REFERENCE NOTES    | 19          |
| INTERNET SEARCH         | 31          |

g.

# Cover Letter and Resume

Rick J. Rudometkin 1479 Elkins Lake Huntsville, TX 77340 575-200-5550

May 1, 2023

Lynelle Klein – Sr. Vice President Colin Baenziger & Associates 970-433-7189

Dear Ms. Klein,

The City Manager opening in Belle Isle, Florida is an ideal opportunity for me to provide excellence in leadership at a great organization. A city in pursuit of outstanding performance and professionalism is key in my search for the future. The City of Belle Isle fulfills this objective and provides far more, being a family friendly community with low crime and an excellent place to have longevity for my daughter to grow up.

As a seasoned executive, I embrace new ideas and am committed to implementing the best management practices to ensure the city's continued economic vitality, development, security, and growth. My experience at an engineering firm (Greater Los Angeles Area), a prestigious small beach city (Dana Point, CA), a rural county, a full-service city, a flourishing industrial county (Eddy County, NM), two top-rated cities, and recently a high-growth city has made me well-balanced with great depth and understanding of local governance.

Recently, I was laid off from Huntsville, TX, where I served as Deputy City Manager for one of the fastest-growing communities outside the Houston area. Previously, I was the City Administrator of Snoqualmie, WA, during the outset of COVID-19, successfully managing the city and maintaining morale. Also, I served as the City Manager of Sammamish, WA, as their fifth manager in 1½ years, navigated a divided council. Before that, I was the County Manager of Eddy County, NM for 5½ years. We experienced a strong upturn in the economy due to the oil and natural gas industry returning to full capacity with an unprecedented influx in population, along with increased economic vitality and tourism. We instituted practices to prepare the local economy for a tremendous future. Lastly, as the Chief Administrative Officer for Modoc County, CA, I was appointed to the role in the middle of the county's worst economic crisis and enacted measures that successfully prevented the county's bankruptcy.

My years of municipal and county government experience, including the private sector, have given me the ability to successfully help lead the City of Belle Isle into a prosperous and sustainable future. You will find me to be a multi-faceted, visionary servant leader with a vast knowledge of local government that holds to a high standard of excellence while working with the utmost integrity and flexibility.

Sincerely,

Rick J. Rudometkin

#### RICK J. RUDOMETKIN - CPM, ICMA-CM

(575) 200-5550 • rick2carrie@gmail.com

#### CITY OF HUNTSVILLE – Huntsville, TX Deputy City Manager, 03/2021 – 10/2022

Huntsville is one of the fastest-growing communities outside of Houston. With a population of almost 46,000 and a forecasted population of 68,000 by 2040. Huntsville is poised to be a hotspot for years to come.

- Oversaw the design/construction of a new City Hall, new Service Center, new Community Center, and a new Animal Control Facility for Y 2022
- . Oversaw the final punch list items on the newly completed Police Station and Fire Station
- Reviewed the feasibility of and the costs associated with relocating overhead utilities either underground or behind properties
- · Assisted local non-profits through the use of American Rescue Plan Act funds
- Completed transit study and made recommendations for funding during FY 2022/2023 Budget
- Updated the City Development Code and Engineering Criteria Tech Manual for Y 2022
- · Considered new zoning requirements for consistent development standards for new growth
- Oversaw the newly created MUDs and PIDs approved by the Council for economic development and community enhancement tool that finances the costs of qualified public improvements that confer a special benefit for a definable part of the city and/or its extraterritorial jurisdiction
- · Implemented the newly approved 2040 Comprehensive Plan

#### CITY OF SNOQUALMIE - Snoqualmie, WA

#### City Administrator/Chief of Staff, 01/2020 - 03/2021

The city is ranked #4 "Best Place to Live in Washington" and #1 "Safest City" for three straight years. Snoqualmie operates under a "Strong Mayor" form of government. It is a full-service city.

- Successfully negotiated with the Fire Union for a new (1) year contract due to COVID-19
- Applied new mitigation strategies/policies due to COVID-19, kept essential city services while helping our community businesses stay open and sustainable during our state's 4 phase plan
- Acting Community Development Director during the search for a new permanent
- Rebuilt morale and council/staff relations during my tenure
- Addressed "build-out" development concerns and new development for vitality and sustainability
- Evaluated utility rates, including the expansion of our wastewater treatment facility
- Continued EIS for the 261-acre Mill Site Development Project
- Completed Council Retreat with a new vision for development and sustainability
- Chairman of eCityGov Alliance Executive Board
- Alternative city rep and eCityGov rep for WCIA Board of Directors

#### CITY OF SAMMAMISH - Sammamish, WA

#### City Manager/CEO, 5/2019 - 11/2019

The city has 134 total allocated positions and is 22 square miles in size. The 2019-2020 Biennial Budget is \$250 million. Sammamish was ranked #9 in Money Magazine's, "2018 Best Places to Live." According to the Seattle Times, "Sammamish Leads the Country in Median Income."

- At the council's request, implemented the elimination of all City Council Committees in 2019
- Lead recruitment processes for Deputy City Manager, Director of Public Works, Director of Human Resources, Director of Community Development, and Police Chief
- Former representative on the King County Sheriff's Office Oversight Committee
- · Former Treasurer of the eCityGov Alliance Executive Board
- Under council direction, resolved concerns in the contract agreement between YMCA and the city
- . Diligently worked on securing an independent audit of the council-approved Concurrency Traffic Model

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## Section 9

#### COUNTY OF EDDY - Carlsbad, NM County Manager/CEO, 10/2013 - 4/2019

Eddy County experienced a boom in economic growth and vitality due to the oil and natural gas industry returning in full force. The county had a stable population of approximately 70-75,000 and was growing rapidly. The daily population in and out of the county was over 100,000 and was rising rapidly as well. Eddy County was extremely fast-paced and still is one of the top revenue producers for the State of New Mexico. The county has 394 total allocated positions. FY18/19 budget is \$134 million and is 4,200 square miles in size.

- Implemented Incode & Eagle product suites, along with Kronos timekeeping software
- · Used strategic/tactical planning for continued economic vitality during this upturn in the economy
- Affordable Housing, Master Transportation, Master Comprehensive Plan implementations
- Implemented economic development processes, including IRB's, Bonding, Zoning/ETZ, housing for growth
- Secured unmodified/clean FY 14/15, FY 15/16, FY 16/17, and FY 17/18 audits
- Ordinance update and adoption: zoning, manufactured home, RV park, GRT, weed, trash, rural addressing
- Volunteer Fire Department restructuring, reorganization, and possible life-flight EMS for exceptional service
- Implemented first ever "Energy Advisory Board" with the Energy Industry and the community
- Resolution with state/federal legislators on the highly extensive brine-well cavern remediation project
- Implemented and secured additional LNG cryogenic plants with IRBs approaching \$2 billion
- Risk Awareness Program Award (RAP) reduced WC claims-28%, Auto claims-65%, Multi-line claims-91%
- Vice Chairman for NMCIA Worker's Compensation Pool Board of Directors, Y 2018 to 2019
- Instructor, NM EDGE through NMSU Leadership, Ethics, Y 2018 to Y 2019
- USFS Wildland Fire Meta-Review Focus Group Advising Member, Y 2018
- Vice Chairman for NACo Environment, Energy and Land Use subcommittee Land, Y 2018 to Y 2019
- Vice Chairman and former Treasurer for NMCIA Multi-Line Pool Board of Directors, Y 2016 to Y 2019
- NMCIA Worker's Compensation Pool Board of Directors Member Y 2016 to Y 2019
- Treasurer of the NMAC Manager's Affiliate Y 2016 to Y 2017
- NMCIA Multi-Line Pool Board of Directors Member Y 2014 to Y 2019
- NACo Environment, Energy and Land Use (EELU) Steering Committee Member, Y 2014 to Y 2019
- Chairman of REDA (Regional Emergency Dispatch Authority) Executive Board Y 2014 to Y 2019
- Executive Member of Eddy County Fire Service Fire Board of Directors Y 2014 to Y 2019
- Carlsbad Department of Development Board of Directors Member Y 2014 to Y 2019
- Lieutenant, La Huerta Volunteer Fire Department Eddy County Fire Service, Y 2014 to Y 2019
- Eddy County's designated Lobbyist, Y 2013 to Y 2019

#### COUNTY OF EDDY - Carlsbad, NM

### Public Works Director, 04/2013 – 10/2013

Planned, organized, and directed the county's public works, waste disposal and road departments with a staff of 64 in two districts, landfill, and a \$15 million budget with 1,252 miles of roads. Responsibilities included: policy development, program planning/strategic planning, CIP, personnel, and budget. (Quickly promoted to County Manager).

- · Provided a strategic analysis of the department
- Evaluation of personnel revealed: understaffed and recruitment difficult
- · Existing policies were updated and their implementation successful
- Pavement management system (PMS) installed and implemented

#### CITY OF COLORADO SPRINGS - Colorado Springs, CO

#### Streets Division Manager (Deputy Director Equivalent), 1/2012 – 02/2013

This position entailed leadership to a staff of 130, which are divided between five districts and 16 grids in a city with a population of 445,000 and 197 square miles in size. Hired as a change agent to implement the strategy of the first strong Mayor form of governing in the history of Colorado Springs. Tasked to initialize outsourcing of the Streets Division, beginning with resurfacing operations and snowplowing.

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(Co-Chairman of County EOC Disaster Committee. Given duties of Debris Manager).

- · Transformed division's safety culture from a compliance enforcement program into a core value
- Decreased Worker's Comp claims: down from 26 claims/\$75,000 in 2011 to 11 claims/\$13,000 in 2012
- Led the design and implementation of an innovative 50/50 cost share concrete program citywide
- Help coordinate response activities related to the 18,427-acre blaze called the Waldo Canyon Fire that destroyed more than 350 homes and killed two residents, also led the enormous debris removal effort
- Successfully outsourced in-house resurfacing operations, which saved the General Fund \$500,000 annually

#### COUNTY OF MODOC - Alturas, CA

Director of Transportation / Public Works Director / Building Official, 12/2007 – 12/2011 Chief Administrative Officer (CAO) / Director of Admin Services / Trans, 11/2009 – 06/2011

#### Chief Administrative Officer (CAO) / Director of Admin Services / Transportation:

Promoted while serving as Director of Transportation / Public Works Director / Building Official to provide focused financial and administrative leadership amid the worst economic crisis in county history. Drafted and administered a \$70 million total annual budget and oversaw 280 employees to support the interests of 9,500 residents. Enacted measures that successfully prevented the county's bankruptcy.

- Functioned as the Interim County Hospital Chief Executive Officer to oversee a \$27 million budget and 150member staff (position given to Chief Fiscal Officer after 11 months)
- Established budget incorporating major cuts in the general fund and a large reduction in staff and
  expenditures with a bond debt service of \$1.5 million and \$150,000 budgeted for the counties first "rainy
  day" fund
- Led a broad-based collaborative effort with the California State Treasurer, Attorney General, Controller, Finance Department, Senator, and the Governor's Office to develop short and long-term alternatives to the county bankruptcy option
- Successfully negotiated with the two union bargaining units to attain a reduction in benefits, for a cost savings of more than \$700,000 over a two-year MOU agreement contract

#### Director of Transportation / Public Works Director / Building Official:

Provided direction, management, and leadership to a staff of 40 members with 5 districts. Responsible for two distinct departments while properly administering a total budget of \$20 million. Serving a 4,000-square mile area, 1,000 lane miles of roads, engineering, projects, buildings, equipment, parks and recreation, utilities, and infrastructure.

#### Education/Training

- Woodbury University, Burbank, CA, Bachelor of Science Business Management
- NM EDGE, Certified Public Manager CPM
- NM EDGE, Certified Advocate for Public Ethics CAPE
- ICMA, Credentialed Manager ICMA-CM
- Eddy County Fire Service, Academy certified, IFSAC and other certifications
- Huntsville Leadership Institute Graduate/CERT

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## Candidate Introduction

## **EDUCATION**

Bachelor of Science, Business Management, Woodbury University, Burbank, CA Certified Public Manager (CPM), NM EDGE Certified Advocate for Public Ethics (CAPE), NM EDGE Credentialed Manager (ICMA-CM), ICMA Firefighter training (IFSAC, Academy and other certifications)

## **EXPERIENCE**

| Deputy City Manager, Huntsville, TX                                      | 03/2021 - 10/2022 |
|--|-------------------|
| City Administrator/Chief of Staff, Snoqualmie, WA                        | 01/2020 - 03/2021 |
| City Manager/CEO, Sammamish, WA  | 05/2019 - 11/2019 |
| County Manager/CEO, Eddy County, NM                                      | 10/2013 - 04/2019 |
| Public Works Director, Carlsbad, NM                                      | 04/2013 - 10/2013 |
| Streets Division Manager (Deputy Director Equivalent)                    | 01/2012 - 02/2013 |
| Colorado Springs, CO   |                   |
| Director of Transportation / Public Works Director / Building Official   | 12/2007 - 12/2011 |
| Modoc County, CA   |                   |
| Chief Administrative Officer (CAO) / Director of Admin Services / Trans. | 11/2009 - 06/2011 |
| Modoc County, CA   |                   |
| Public Works Manager/Streets Manager, Dana Point, CA                     | 08/2003 - 12/2007 |
| Utility/Project Manager, Willdan, Los Angeles region, Industry, CA       | 12/2000 - 08/2003 |
| Senior Public Works Inspector, Willdan, Greater Los Angeles Area, CA     | 03/1994 - 12/2000 |

### **BACKGROUND**

The City of Huntsville, TX is experiencing a boom in economic growth and population due to the current domestic migration. The city has a population of approximately 46,000. The community is known for its prison system and Sam Houston State University. The City of Huntsville is a full-service city. The reporting structure is a council-manager form of government. The City Manager, City Attorney, and City Secretary report to the council. The staff report to the City Manager.

The City of Huntsville currently has 277 employees. I supervised 4 department directors with a total of 142 employees within those 4 departments. The general fund budget is \$32M with an overall budget of almost \$81M.

The current issues affecting the community, agency, and departments are rapid growth. There have been 52 commercial projects and seven residential projects using tax deferment, PID, and MUD agreements. There are currently four vertical projects going on now in different phases: Animal Control Facility, MLK Community Center, Service Center, and City Hall.

Three of the most important issues currently facing Huntsville:

- Infrastructure and facility upgrades. A \$20 million bond is needed for a new trunk main sewer line. Rehab/replacement of a critical lift station, three sewer treatment plants to upgrade, and numerous water line upgrades/upsizing to provide more potable water to the ever-growing area. Roads are in dire need of expansion and rehabilitation. New facilities are being constructed.
- Drainage has become an elevated issue as well, with all the development and we were looking to implement a "drainage fee" to address these issues.
- Expansion of the local airport to accommodate the growth and air traffic has increased due to development. Longer runways for larger planes are desperately needed.

### GENERAL, MANAGEMENT STYLE AND EXPERIENCE

My interest in the City of Belle Isle stems from reading about the organization's values. It is a wonderful community, which would be a great place for my family to thrive. Also, there are many surrounding amenities and of course, Disney World for my 11-year-old daughter! Last year, she danced in the "Summertime Spectacular" at Disney World and loved the Orlando area. This would be an exciting opportunity for me, as the next City Manager, to implement plans that will allow the city to flourish in a healthy way. Under the leadership of the Council, I would focus on serving and bringing the city to a greater level of functionality and exploring new avenues to offer extraordinary customer service to the citizens. My experiences and continued education have made me an outstanding executive and a great fit to meet the needs Belle Isle has today. I am at a place in my career where I can utilize my experiences and knowledge to address challenges and solve issues, including thoroughly exploring and utilizing the opportunities.

My management style is best described as a Visionary Servant Leader, which has developed during my years of local municipal/county government service, including time in the private sector. Part of my vision comes to life in creating a team spirit that connects the staff to the council's vision. Together we spark an internal partnership, so we can work toward common goals. Mentoring and offering advice/counsel helps dramatically in building the team. People will follow and perform, when there is a genuine interest in helping them to succeed and get the due credit they deserve.

My management style uses ideas/skills such as:

- Exercising absolute integrity
- Being authentic
- Having an executive presence
- Open door policy

#### RICK J. RUDOMETKIN

- Resiliency
- Hybrid skills
- Continuous Quality Improvement
- Working in collaboration with all parties
- Emotional Intelligence

Other strategies used in my management style are: "active and effective listening, forgive and forget philosophy, build trust, empathy for others, always do what is right, see the humor, relax - will you!" All these strategies for me are self-generating. To be successful, these tools need to be used. We all have our goals and achieving them together is possible with cooperation and thinking outside the box or finding something inside the box that was overlooked.

Here is a quote from a staff member that reflects how my management style is viewed:

"Mr. Rudometkin is a manager that loves his job, his County and the people serving the County in every elected and departmental office. His style is truly leading by example and assisting any elected official or department head if, and when, needed. He allows those individuals the latitude to manage their respective offices and personnel, with each and all of those individuals being aware that he is there to assist them with any needs they have. He will monitor and will step in, when necessary, to give advice, assistance and recommendations, and will step in and direct actions, when necessary or requested."

The consensus from elected officials is that I treat them with respect, compassion and honesty. My reputation as a leader and partner is excellent. My openness to partner paired with my genuine interest in seeing their vision fulfilled has brought about healthy relationships. They appreciate that I work diligently, while keeping clear communication between all parties. I couple that with integrity, ethics and a willingness to always be transparent. Transparency is vital as part of the organizations core value and communication between all parties opens the door for success, as we are all in this together.

One of my strengths is reflected in actively and regularly communicating, in a candid manner, to build a strong accountable team. Each member will see me leading by example and know that they are valued and understand their responsibilities. Openly facing workplace issues will be welcome, while showing each team member care for their development and growth.

For example, upon being hired as the County Manager at Eddy County, I knew the Director of Administrative Services had also applied for the position. Many were afraid he would leave, but through my concern and interest in him, he stayed. My interest was to see him succeed and he could tell it was genuine. I learned his strengths and weaknesses, listened to his ideas and vision. As time progressed, so did his productivity, outlook, and contributions. He started to work at his full potential. He was promoted to the Assistant County Manager position and we have had and continue to have a great relationship, even after his retirement.

Part of my strength in practice is reflected in the emphasis put on strategic planning. It is an

organization's life blood. It sets the priorities, focus, short and long-term goals, toward the direction of the future of the organization. Within this plan, tactical planning is used to achieve each individual action and is used to directly go from A to B. My whole career has been spent on creating or following a strategic plan. I have used this planning to reinforce where an agency is going, to reinforce the actions needed for progress in moving forward and to measure if the organization will be successful.

Another strength of mine comes from my extensive experience in finance and budgets. This began while working for Willdan (an engineering and construction management company), the City of Dana Point, CA and City of Colorado Springs, CO. As my career has progressed, the depth of my understanding into fund accounting and finances has grown immensely.

At the County of Modoc, CA, we established a budget incorporating major cuts in the general fund and a large reduction in staff and expenditures, with a bond debt service payment of \$1.5 million annually and \$150,000 budgeted for the counties first ever "rainy day" fund. While scrutinizing the county's finances, I identified \$800,000 in cost saving measures, sufficient to fund the first effective external audits in the county's history. Under my leadership, Eddy County had its first unmodified/clean (FY 14/15) audit in twelve years and have continued with four straight years of clean audits. While working through the oil and gas revenue shortage, during the FYE 17 budget, we implemented a flat based budget and made \$17 million in cuts to balance. I continued with budget presentations and workshops at Sammamish (\$250M bi-annual) and Snoqualmie (\$62M annually).

Concerning weaknesses, I can care too much about the issues the organization faces and want others to care as much as I do, when that's not always practical or possible.

Concerning performance measures, annually each team member should be evaluated at every level. If there are issues, a Personal Improvement Plan will be implemented and specific goals will be documented to be achieved. It is essential to develop a clear communication loop in which expectations and needs are constantly evaluated during this process. These steps are taken to ensure that successful team members will be able to promote into positions that suit their talents. I also strive to create a safe work environment, where people are comfortable taking chances and thinking for themselves.

I have used documentation, agency resources, examples, comment boxes and other performance tools to make sure that the best practices and efficiencies are being used and followed. An organization is only successful when the leaders look at ways to improve processes and implement these processes. It is important that the council and their executive are on the same page with common goals moving the organization forward.

The process of tracking an organizations progress is one that requires planning, listening and people skills. Meeting established goals is very important. You can do this with performance management, or other proven systems that track this performance. Be a great listener and facilitate this type of process to ensure that all avenues are taken into consideration. I have used

### RICK J. RUDOMETKIN

the "smart goal" framework:

- S Specific
- M Measurable
- A Achievable/Attainable
- R Results oriented/Realistic/Relevant
- T Time bound

This is a very good tool. By keeping these goals relevant, we can reinforce the importance of the strategic objectives and communicating why the goals of the city are so important. We need the proper training for staff, so they can realize their true potential as well. This creates a person who is comfortable and confident in the job they were tasked to do.

My biggest success and failure are intertwined and occurred in my previous position as the Chief Administrative Officer of Modoc County. I was appointed to the role in the middle of the county's worst economic crisis and enacted measures that successfully prevented the county's bankruptcy. Previous management had misappropriated monies from the treasury and moved them to balance the hospital's budget, which is an enterprise fund. Almost \$13 million dollars was moved from the treasury to the hospital. The state controller told the BOCC to put the money back into the treasury since it was moved illegally, which I agreed. We tried to secure a revenue bond through a financial team to restore the treasury, but the BOCC did not want to do that. Instead, they wanted to pay themselves back at the displeasure of the state and myself. My failure was not seeing the revenue bond through as the State Treasurer directed. We moved forward against the direction of the state, which led us to ask the BOCC with our auditor and bankruptcy attorney to let us dry-period loan monies from the treasury to pay our bills or we would go insolvent. The BOCC agreed and the county did not go bankrupt and critical county services were retained. The community stayed intact, and the county was able to function. Modoc again became a place to be proud of, although the county has suffered a reduction in services due to the fact the misappropriated money was not restored to the treasury. Throughout the ordeal the community was kept well informed as I continually updated the local newspaper of the events as they unfolded. Also, at all board meetings updates were given. The community was kept up-to-date, and we acted in full transparency.

In my career, I have laid off or terminated over thirty plus employees. In all cases, it was handled with professionalism and compassion, whether facing sadness over losing a great employee due to a reduction in workforce or satisfaction that a bad employee is gone (which typically creates a morale boost). As a leader and mentor, difficult situations are faced daily, and the decisions made impact the lives of others deeply; but I am always willing to make the hard decisions to make sure the agency continues to function properly, have sustainability and a quality workforce.

In my career I have faced many challenges. These are the challenges I see facing Belle Isle:

- Keeping the city, a safe place to live, work and play with minimal crime
- Healthy growth with limited opportunities

#### RICK J. RUDOMETKIN

- Working with the County to annex land for expansion
- Upgrading and building new facilities to accommodate expansion
- Funding for the new facilities expansion
- Relationships and collaboration need improvement to help resolve issues
- Improving communication with the citizens and councilmembers
- Look into the airport issues facing the city to see if anything can be done
- Infrastructure improvement is needed for proper sustainability
- Cost sharing between agencies needs to be addressed

During my first six months in Belle Isle, I would be an excellent listener and learn as much as possible about the culture of this city. My initial purpose would be to meet with each individual councilmember and inquire about the vision of the city. Secondarily, I would get to know the department heads and staff. Next, I would start interacting with the citizens and attending pertinent meetings to gain insight to the functionality of the community. This way within the first six months, development of great relationships will begin, while understanding the processes of Belle Isle. Time would also be spent reading the Policy and Procedure Manuel, Ordinances and other Policies to examine whether they are sufficient and functioning in the most efficient way. During this time, my hope would be to create partnerships and a culture of trust.

I am very responsive and proactive with the media and work to provide the most accurate information for the community. I have used Facebook, Twitter and Live Streaming at Huntsville as a customer service tool. Our postings captured information that would be useful to our citizens, like employment opportunities, traffic, counsel meetings, public safety issues, local government trends and events.

There is not anything in my background that would embarrass myself or the city.

In Belle Isle, I would use social media and transparency to keep the community informed on all pertinent activities taking place in the city. Social media is a tool to keep the community aware and it allows for greater transparency. It is critical to have something in place capable of providing an avenue for people and the media to get the answers to their questions and possible resolution to their issues. We need to facilitate open and direct dialog in the community. An environment must be created that gives access to open communication that maximizes dialog and a willingness to listen.

If I am chosen as a finalist, there should not be anyone contacting the city.

During my limited leisure time, playing with my daughter brings me the most joy. My family loves spending time with each other. We enjoy walking, biking, trips, camping and of course...golf and dance!

### SIX ADJECTIVES OR PHRASES I WOULD USE TO DESCRIBE MYSELF

- Resourceful
- Adaptable
- Honest
- Considerate
- Diligent
- Reliable

## **REASON FOR LEAVING PREVIOUS POSITION**

In Huntsville, I was laid off. The official reason for being laid off was a reduction in workforce. The letter from HR will be provided, if desired. Confidentially, my approach in going forward differed from the current management. In my long career, I have kept a high ethical standard and would like to move my next agency forward with that mindset.

## **MOST RECENT OR RELEVANT SALARY**

My most recent base salary was \$150k annually.

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# CB&A Background Checks

## **Background Check Summary for RICK JOHN RUDOMETKIN**

#### **Criminal Records Checks:**

Nationwide Criminal Records Search No Records Found

County

Walker County, TX

King County, WA

Eddy County, NM

No Records Found

Not Available\*

Not Available\*

State

Texas No Records Found
Washington No Records Found
New Mexico No Records Found
Colorado Not Available\*
California Not Available\*

### **Civil Records Checks:**

County

Walker County, TX
No Records Found
King County, WA
No Records Found
Eddy County, NM
No Records Found
El Paso, County, CO
Not Available\*
Modoc County, CA
Not Available\*

Federal

Texas No Records Found
Washington No Records Found
New Mexico No Records Found
Colorado Not Available\*
California Not Available\*

**Motor Vehicle** 

Texas No Records Found

**Credit** Excellent

Page 16 of 83

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## Section 9

## **Background Check Summary for RICK JOHN RUDOMETKIN**

Personal Bankruptcy No Records Found

Sex Offender Registry

Not Listed

**Education** Confirmed

**Employment** Confirmed

Social Media Nothing of Concern Found

Under the Fair Credit Reporting Act, 15 U.S.C. 1681-1681Y, credit and bankruptcy information are very sensitive and should not be used be in the consideration of hiring. The information is included for each candidate because we do not want you to be surprised if third parties raise what they consider to be a concern. Also, some states have limited the reporting to seven years, so any records older than that will not be available in those states. In addition, motor vehicle reports are limited to three to seven years, depending on the state.

<sup>\*</sup> Records are only available in this state for the past seven years and the candidate worked there prior to that period.

# **Background Check Summary for RICK JOHN RUDOMETKIN**

### **Personal Disclosure**

## Personal Disclosure Questionnaire

| Name o  | of Applicant: Rick J. R  | .vc                                     | dometkin  |  |
|---|--|---|---|--|
| backgreelimina<br>and that<br>compete<br>question | ound. Please answer them hosted from all further searches cout charges do not mean you were assation. The bottom line is thems, please contact us for clarific | nestl<br>ndue<br>guil<br>nat v<br>ation |   |  |
| <u>Please</u>                                     | explain any yes answers on a s   | epar                                    | rate sheet of paper.  |  |
| 1.  | Have you ever been charged or  | con                                     | victed of a felony?   |  |
|   | Yes  | No                                      | X   |  |
| 2.  | Have you ever been accused of  | or h                                    | have been involved in a domestic violence or abuse incident?  |  |
|   | Yes  | No                                      | X   |  |
| 3.  | Have you ever declared bankru  | ptcy                                    | or been an owner in a business that did so?   |  |
|   | Yes  | No                                      | X   |  |
| 4.  | Have you ever been the subject lawsuit?  | of a                                    | a civil rights violation complaint that was investigated or resulted in a                                     |  |
|   | Yes  | No                                      | X   |  |
| 5.  | Have you ever been the subject   | of a                                    | a sexual harassment complaint that was investigated or resulted in a lawsuit?                                 |  |
|   | Yes  | No                                      | X   |  |
| 6.  | Have you ever been charged wi  | ith d                                   | lriving while intoxicated?  |  |
|   | Yes  | No                                      | X   |  |
| 7.  | 7. Have you ever sued a current or former employer?  |   |   |  |
|   | Yes  | No                                      | X   |  |
| 8.  | Please list links to all your socia<br>personal web page if you have   | al mo                                   | redia accounts (Facebook / Instagram / LinkedIn / Twitter, etc.) and your                                     |  |
| 9.  |  |   | ground that, if made public, would cause you, our client or our firm arough the press or any other mechanism? |  |
|   | Yes  | No                                      | X   |  |
| 10.   | Please provide a list of any law   | vsuit                                   | is in which you are or have been a party either as plaintiff or defendant. N/4                                |  |
|   |  |   | Attested to: Signature of Applicant   |  |

Please email this form via PDF DOCUMENT to Monique@cb-asso.com or via fax to (561) 621-5965 no later than 5:00 PM MST 05/15/2023.

Page 18 of 83

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# CB&A Reference Notes

## Mark Hofman – Former Community Development Director, Snoqualmie, WA 208-721-8548

Mr. Hofman has known Mr. Rudometkin since January of 2020. Mr. Hofman worked for the city of Snoqualmie for seven years and was grateful for his time working with Mr. Rudometkin. Mr. Hofman was sad to see Mr. Rudometkin leave but understood his reasons for doing so.

When Mr. Rudometkin was first hired, the staff felt a little apprehensive because of his short tenure in Sammamish. However, after working with him and watching videos of Sammamish Council meetings, they realized that his supportiveness of the staff created problems with the Council majority at that time. The events since his departure have shown that he was on the right side of the issues, and his departure was not a reflection of him or his performance. He did an exceptional job in Snoqualmie, and while no one is perfect, he has a good memory and good instincts. Everyone hoped that he would stay a very long time and establish a home base in Snoqualmie. He has a calming personality and is a manager that you hope will never leave.

Following an Administrator who had been in place for many years, Mr. Rudometkin was very professional and fantastic. He learned very quickly and helped them through a difficult time. He provided the organization what was very needed and brought them through covid.

When bringing an issue to Mr. Rudometkin, he requests a recommendation as well. He asks for all sides as well as potential impacts, and then works with staff to find a solution. His depth of experience and patience is truly an asset.

Snoqualmie had a strong four term Mayor when Mr. Rudometkin was the administrator, which was unusual. The Mayor knew more than most elected officials because he was one of the first residents in Snoqualmie Ridge. Mr. Rudometkin handled that balance and everything else very well. Whether it was buying resources, working on grants, or working remote during covid, every decision in such a chaotic time was perfect. His leadership made a significant difference to the staff and organization.

While Mr. Hofman and Mr. Rudometkin may not have always agreed, Mr. Rudometkin was always respectful, and he listened. When the meeting was over, they left as one team no matter what the decision was. When they were working remote, he had to ensure accountability for the staff even though he was not working alongside them and did so in a way that did not create any pushback. 99.9% of residents support his style, he is fiscally conservative and relatively risk adverse, but he also can make a decision.

Mr. Rudometkin is very responsive, almost immediately, to a highly demanding community. He recognizes that responding quickly with the right resource saves work and time in the long run. He is not shy about delegating or asking staff to contact residents. He requests that they return voicemails from constituents in a day, and emails in one or two days, if not immediately. He kept the staff very informed as well and was always respectful in his communications. His door was open, and staff could come in at any time to discuss City matters.

In 24 hours, Snoqualmie went from 'business as usual with a high workload', to 'how are we going to survive a pandemic and can we even work'. Businesses were closed, construction was halted by the state, and everyone was worried. The Mayor was one of the first to contract covid and he had to step back. Mr. Rudometkin gathered everyone together and led them through the difficulties. He never showed stress or misspoke, and he was always patient. He was very even tempered.

Two thirds of Snoqualmie was built at the same time by the same developer who then left town, and because of this, it has a significant revenue issue. Mr. Rudometkin brought tools that helped for the short term. He walked them through the process and got facilitators. Even though he was fairly new to Washington State, he knew what tools were available and where to get answers. He stayed a few steps ahead of a very educated City Council and handled the matter sufficiently.

Everything they did was controversial to some degree. The Mayor was running for a state seat and was heavily involved in regional activities. He did not demand the staff participate in regional issues, but wanted them to know what was happening. Nothing was easy or boiler plate, but while Mr. Rudometkin was there, the City ran well. Mr. Hofman is not aware of anyone who has a negative opinion of Mr. Rudometkin.

Mr. Hofman would hire Mr. Rudometkin and wishes he never left. If Mr. Hofman was asked to recommend a City Manager, two individuals are at the very top of his list, Rick Rudometkin and Bob Larson. Both are very calm, but they get things done.

## Words or phrases used to describe Rick Rudometkin:

- Accountable,
- Friendly,
- Professional,
- Insightful, and
- Fun to work with.

Strengths: Good to work with, accountable, polite, very experienced, good skillset, very

collaborative, has a nice depth of experience and patience.

Weaknesses: None identified.

### Kevin Lunsford – Former Police Chief, Huntsville, TX 936-662-1844

Mr. Lunsford was the Police Chief in Huntsville, and he worked with Mr. Rudometkin from 2021 to 2022.

Mr. Rudometkin was easy to work with and very responsive when employees had a question. They worked together very well. His decisions in general are good. He was not brought in to be a change agent, but he was very innovative. He handled personnel issues which included disciplinary actions and made changes for the betterment of the organization.

Being very personable, Mr. Rudometkin works well with the public. He was always very respectful of everyone including the staff, citizens, and elected officials. He was never flippant or demeaning in his interactions. He responded positively in every situation, whether it was stressful or not. He was always full of energy and ready to go.

They did not work together on a daily basis but on the projects that they worked together on Mr. Rudometkin was very good about keeping everyone informed. Some of the projects included building a new police facility and going through the punch list. They also managed some issues with the animal shelter and preparing to build a new facility for the shelter.

During the construction of a new 40k square foot policy facility, Mr. Rudometkin leveraged his vast experience and helped them through the process. He resolved every issue and did not hesitate to jump in. A few times they found errors, like a sink had been installed in the wrong place, and the construction company balked when asked to fix it. He followed through until it was corrected.

Mr. Rudometkin has not been involved in anything controversial, either professionally or personally. While everyone has detractors, Mr. Lunsford cannot recall anyone who dislikes Mr. Rudometkin. They worked well together, and Mr. Rudometkin is more enjoyable to work with than most government officials.

Mr. Lunsford would hire Mr. Rudometkin and highly recommends him. He is a nice person.

### Words or phrases used to describe Rick Rudometkin:

- Personable,
- Respectful,
- Dedicated, and
- Appropriately tenacious.

**Strengths:** Personality, thoroughness on getting the job done and following through.

Weaknesses: None identified.

## Bob Sterbank – City Attorney, City of Snoqualmie, WA 425-890-0232

Mr. Sterbank worked with Mr. Rudometkin for about eighteen months from 2020 to 2021. Mr. Rudometkin was the Interim Manager and then was appointed to the position permanently. Mr. Sterbank handled external policy and provided direction on policy. Mr. Rudometkin ran the day-to-day operations.

An excellent manager, Mr. Rudometkin has a very approachable, easy-going personality. He likes to involve others and he kept Mr. Sterbank informed, which is important. The attorney cannot adequately advise the city if he is not involved. Mr. Rudometkin was also very open to legal advice, unlike some managers.

Mr. Rudometkin was very good about getting input and focusing on a practical outcome when making decisions. He consistently arrived at a good solution, which is one of the reasons that he was so good to work with. He maintained the organization at a high level notwithstanding covid challenges and staffing shortages. He managed the transition to zoom meetings and all of the other necessary changes from the pandemic.

One area important to Mr. Sterbank is communication and Mr. Rudometkin was very good at relaying data. He conveyed information to the executive team as they have their hands on most of the day-to-day decisions.

Mr. Rudometkin is very responsive. He is a calm, no-nonsense guy. He is very upbeat and positive. The pandemic was tough, particularly for those who contracted the virus as the effects often persist after the illness. He worked through every difficulty and was good at encouraging people to put infighting aside for the greater good. He also worked through the burnout that came with the shift to remote work and working longer hours with less staff. He brought his positive, cheerful, upbeat personality to every issue and circumstance.

While Mr. Rudometkin's departure from Sammamish was rocky, the organization was going through many challenges that were not of his doing. His tenure in Snoqualmie was very good and without any issues. His conduct and background would not concern an employer.

Mr. Sterbank would hire Mr. Rudometkin and highly recommends him. Everyone was uniformly pleased with his performance and disappointed when he left.

## Words or phrases used to describe Rick Rudometkin:

- Practical,
- No-nonsense,
- Upbeat,
- Positive,
- Brings out the best in others, and
- Collaborative.

**Strengths:** Approachable, good at details, well versed in public works, development issues

and complicated capital projects.

Weaknesses: While not a weakness, he was more accustomed to a City Manager form of

government.

### Matt Larson – Former Mayor, City of Snoqualmie, WA 425-444-3596

Mr. Larson hired Mr. Rudometkin after their long tenured Manager took a new position. They were looking for an interim and Mr. Rudometkin was available, so they snatched him up. He settled in nicely, the staff liked him, and he worked well with the Council and with everyone. Generally interim managers are not a candidate for the permanent position, but they liked him so much they cancelled the search and offered him the job on a permanent basis.

Mr. Rudometkin has a very high EQ, he can come into a room and quickly make everyone feel comfortable. He shakes their hand and is very affable. He empowers employees to take ownership for their responsibilities. He managed employees to best showcase their individual strengths. He comes into a room with a smile and lights up the room, putting everyone at ease. He created an environment where people could acknowledge what went wrong, without being berated, and determine how to do better next time. He was always in a mode of positive improvement.

When Mr. Rudometkin was hired in Sammamish, there was much contention about growth issues and some activists successful ran for the Council to stop growth. Communities have three buckets to keep the lights on. They can raise taxes and fees, cut costs, or they can gain income through economic development. The Council at that time wanted to reduce taxes and fees, improve service, and stop growth all of which reduce city funding rather than increasing it. When the City encountered financial issues, they blamed everyone else. The City was quite dysfunctional at that time, and they chewed through several managers. Mr. Rudometkin tried to explain to them that they were going to be sued if they continued their course of action on a development agreement. The Council wanted to continue the unwise path they were on, and he separated from the organization. He is a high caliber manager, and he was treated atrociously.

In Snoqualmie the same trend was happening, and the same types of activists were winning seats. They were creating so much chaos, and they were in league with the activists in Sammamish who were so detrimental to Mr. Rudometkin's employment there. The situation felt very reminiscent to Sammamish, so when a position came open in Texas, he accepted it.

Mr. Larson would hire Mr. Rudometkin again in better circumstances, he was slightly risk adverse after Sammamish but has proven to be more independent in other positions.

## Words or phrases used to describe Rick Rudometkin:

- Collaborative.
- Personable,
- Mentors staff,
- Manages people well,
- Affable, and
- Very high EQ.

**Strengths:** 

Very collaborative leader, empowers staff, very flexible in his management style and leads in a way that plays to the employee's strengths, warm, affable, charismatic, always looking to improve.

Weaknesses: Snoqualmie has a Strong Mayor form of government. Mr. Larson was finishing his fourth term and was feeling burned out. They also had some turnover in the executive staff. Mr. Rudometkin did a wonderful job, but he was very vulnerable after his experience in Sammamish and leaned on Mr. Larson perhaps more than he normally would have. That said, the environment itself, plus covid, was extremely difficult and he did an admirable job with what he was handed.

## Stella Davis – Former County Commissioner, Eddy County, NM 575-302-9492

Ms. Davis has known Mr. Rudometkin since his arrival at the County in 2013. She worked with him as a Commissioner until December 2018. They continue to stay in contact.

Mr. Rudometkin's job performance has been most excellent. He articulates well what he wants for the County and is knowledgeable in all aspects of County and State government. He is also excellent at educating himself further and sharing that knowledge with others.

When decisions have to be made, Mr. Rudometkin does very well. He always researches and thinks everything through during the process. He does not jump to conclusions when it is time to make a decision but is thoughtful. He does the same when it comes to hiring personnel. He ensures to get a good feel for each candidate to hire the best people for each position.

Ms. Davis would say that Mr. Rudometkin is innovative, a change agent, and someone who maintains an organization at a high-performance level. He has high expectations for himself and his staff, but he is always looking forward thinking outside the box for ways to move the County into the next phase.

Mr. Rudometkin also has top-notch problem-solving skills. He, Ms. Davis, and another elected official were out of town for a conference and during that time he received a call about an employee who had gone off the rails. He was a veteran who possessed a gun and had taken off

from the workplace. He was communicating with staff members in the office in an effort to resolve the situation. He also was in contact with the Sheriff's office giving them directions on how to handle this particular employee so that they could successfully secure the situation. At the end of the day, they were able to resolve the matter. However, he did not merely terminate his employment, but he ensured that the employee received the mental help that he needed.

Ms. Davis does not know of anything from Mr. Rudometkin's background that would be seen as embarrassing or unflattering if the press were to investigate. He is a family-oriented person who is caring and not rude or obnoxious to others.

## Words or phrases used to describe Rick Rudometkin:

- Outgoing,
- Articulate,
- People person,
- Thinks outside the box,
- Kind, and
- Caring.

**Strengths:** An articulate and caring individual with tremendous problem solving skills.

**Weaknesses:** At first he did not interact much with his employees until the Commission brought it to his attention.

### Bill Morris – Former Community Development Director, Roswell, NM 575-937-1162

Mr. Morris met Mr. Rudometkin in 2013 when he came to Eddy County. He was the Community Development Director and they worked together for a little over a year. They continue to stay in contact mostly via community events.

Mr. Morris has always thought very highly of Mr. Rudometkin. He is smart, aggressive, open minded, and full of energy. He always had a great attitude and Mr. Morris truly enjoyed working with him. Additionally, he worked well with the Commissioners even when they could be challenging and difficult. He is very engaging, communicative, and knows how to speak to people and is respectful, but at the same time always gets his point across.

While Mr. Morris was still with the County he recalls Mr. Rudometkin being a good decision maker. He listens to others' ideas and input and then uses that information to move forward with a solid decision. Additionally, he is not the type of person who will continue doing the same things that others have done for years. He is innovative especially in terms of changing software and technology to make the organization more effective and efficient.

Mr. Rudometkin is a manager who is out and about in the community and amongst his staff. He is definitely a leader in the sense that he rallies his employees around the vision of the organization. Although, at times, he was forced to be in his office dealing with the daily business that is typical for running a County, between him and his Assistant Manager they formed a winning team to tackle all the aspects of managing in and out of the office.

In terms of stress Mr. Rudometkin dealt with it quite well. He is an individual with a religious component to his life that gives him peace. He is grounded and has found a healthy work/life balance. He is truly a well rounded individual.

Mr. Morris is not aware of Mr. Rudometkin having anything in his background that would be thought of as embarrassing. He knows Mr. Rudometkin had some issues while in California, but a good and bad side exists to every issue. Mr. Morris is not privy to any details from that situation and could not comment any further. He would absolutely hire Mr. Rudometkin if he had the opportunity. Mr. Rudometkin definitely excels when working in an organization and community that is interested in moving forward.

## Words or phrases used to describe Rick Rudometkin:

- Smart,
- Energetic,
- Confident,
- Reliable.
- Forward thinking, and
- Not bound by tradition.

**Strengths:** An engaging and intelligent individual who interacts well with people.

Weaknesses: None identified.

## Kenney Rayroux – Former Assistant County Manager, Eddy County, NM 575-706-1238

Mr. Rayroux first met Mr. Rudometkin in 2013 when he came to the County as the Public Works Director. When he was promoted to Manager is when Mr. Rayroux began reporting directly to him. They not only worked together at the County, but they also served together as volunteer firefighters, albeit in separate departments. Mr. Rayroux worked with him until Mr. Rayroux's recent retirement in December 2018. They continue to stay in contact thus far.

Mr. Rayroux and Mr. Rudometkin enjoyed a solid working relationship that was a tag team effort. Mr. Rudometkin is very progressive and forward minded. He truly wants what is best for the residents and his employees. He is always questioning how they should be conducting business as a government entity. He promotes a team atmosphere and excels working in that type

of environment. He is a well-rounded manager who handles conflict well and was always fair in his dealings with his staff and the Commission.

Mr. Rudometkin does well in his dealings with the public. He not only gives back to the community in his role as a volunteer firefighter, but he is also visible at community meetings and events. He is well spoken at public meetings and forums and communicates his message eloquently. Additionally, he is excellent at keeping his staff informed of what is happening in the County and wants his employees to know what is going on at all times.

During Mr. Rudometkin's time working in California, he dealt with some elected officials who were misappropriating funds and from Mr. Rayroux's understanding of the matter, Mr. Rudometkin spent a large amount of time with the state ironing out that problem. He definitely learned the ins and outs of municipal finance from that experience. He was always savvy with the budget at Eddy County and knew what to do with its money.

During Mr. Rudometkin's tenure he has had to deal with his fair share of controversies, however one in particular turned into something that it should not have turned into. The Board wanted to increase the gross tax receipts for capital improvements primarily for some much-needed road improvement projects. What should have been taken care of and approved after only a few meetings turned into a nine-month fiasco where Mr. Rudometkin was attacked by the public. What the public failed to realize, however, is that the increase was put on the agenda by the Board.

While Mr. Rudometkin was in California a newspaper published that he had some anger issues, but he has since matured and changed. He is the type of person who will look into the mirror and do some self reflecting and he has worked through any prior weaknesses and has changed and improved. During the time that they worked together Mr. Rayroux only saw him visibly upset or mad a few times. Additionally, while he was in Colorado the municipality changed from a council manager form of government to a strong mayor. Unfortunately, the newly elected mayor tried to give his friends all of the public works contracts. The employees, including Mr. Rudometkin, filed a lawsuit against the mayor which has since been settled. Mr. Rayroux does not consider those past situations to be cause for embarrassment, but they might give some people pause when looking at him for a position.

Mr. Rayroux is not aware of Mr. Rudometkin having anything in his background that would suggest anything except high morals and ethics. He has never seen Mr. Rudometkin do or say anything that would imply that he would do anything illegal or immoral. Knowing what he knows about Mr. Rudometkin he would hire Mr. Rudometkin in a heartbeat if he were given the chance.

## Words or phrases used to describe Rick Rudometkin:

- Personable,
- Hardworking,
- Dedicated to his team,
- Fair,
- Knowledgeable, and
- Well rounded.

**Strengths:** A well rounded professional who is forward thinking and genuinely wants the

best for his organization and community.

Weaknesses: Sometimes if he believes they need to go in a certain direction it can be difficult

to change his mind. However, if he is given more information and facts, he will

reconsider his position.

### Jon Henry – County Commissioner, Eddy County, NM 575-361-9904

Mr. Henry has known Mr. Rudometkin since 2017 when he came onto the Board of Commissioners. He has worked with him as the Chairman since January 2019.

Mr. Rudometkin has done a fine job for the County. Every time that Mr. Henry has needed anything Mr. Rudometkin always helps him. Mr. Rudometkin has an excellent knowledge and understanding of municipal government. He does a wonderful job of bringing options to the board and doing what they ask of him.

Mr. Rudometkin is a combination of innovative and someone who maintains the organization at a high-performance level. Mr. Rudometkin serves as the liaison for the County to the oil and gas industry in their area. he has really pushed for the County, the oil and gas companies, and the constituents to work together on issues.

In terms of communication Mr. Rudometkin overall does well communicating with the Board. He does a fine job of getting them what they need most of the time, but Mr. Henry is sometimes surprised by issues. However, he is not certain where the breakdown lies and does not put the blame on Mr. Rudometkin.

Mr. Henry is not aware of any controversies involving Mr. Rudometkin since he has known him. He has no knowledge of anything in Mr. Rudometkin's background that would be considered embarrassing if the press were to go digging. If given the opportunity to hire Mr. Rudometkin, he would.

## Words or phrases used to describe Rick Rudometkin:

• Positive,

• Knowledgeable in his field, and

• When he understands the vision, he is good at following through.

Strengths: An excellent professional who is well versed in municipal government and who

does what is asked of him.

Weaknesses: None identified.

Prepared by: Lynelle Klein

Colin Baenziger & Associates

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## CB&A Internet Research

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## Internet – Newspaper Archives Searches RICK J. RUDOMETKIN

(Articles are in reverse chronological order)

The Houstonian (TX) April 19, 2021

## Huntsville hires new Deputy City Manager Rick Rudometkin

Author: Jordan Pemelton

On Tuesday, April 6 during the Huntsville City Council meeting, city manager Aron Kulhavy introduced **Rick Rudometkin** as the new deputy city manager. "I can tell you there is nobody happier to have him on board than I am," Kulhavy said. "He has vast experience in working for local governments in several states."

**Rudometkin** started on March 29 with the city of Huntsville and along with Kulhavy, **Rudometkin** will dive into major projects that the city has planned. "Major projects we are currently working on are the MLK Community center, new police and fire stations and the design of a new City Hall," Kulhavy said. "The DCM assists in managing several departments for the city and also helps drive projects from the council's strategic plan to completion."

**Rudometkin** was previously living in Snoqualmie, Washington where he worked as the cities, administrative administrator. "The growing city, great opportunity, my in-laws are here in Huntsville, sunny weather and great welcoming people," **Rudometkin** said when asked what brought him to Huntsville.

**Rudometkin** is the first to hold the deputy city manager position. According to **Rudometkin**, he hopes to support the vision of Huntsville, help department heads with their projects, and address citizen needs and issues while supporting the city council. "Since I am new, I want to provide great service, get to know the community and provide support wherever I can," **Rudometkin** said. "Then, help make Huntsville the best place to live, work and play."

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## Internet – Newspaper Archives Searches RICK J. RUDOMETKIN

(Articles are in reverse chronological order)

Snoqualmie Valley Record (WA) March 10, 2021

With Snoqualmie's Rudometkin resigning, fire chief to serve as interim city administrator Author: Unknown

Snoqualmie City Administrator **Rick Rudometkin** has resigned and will be replaced, for now, by the city's Fire Chief Mark Correira. The city council appointed Correira unanimously at the March 8 council meeting. It is expected that the fire chief will serve in the role of interim city administrator for at least three months, overseeing the city departments. The city will begin the process of recruiting a permanent city administrator.

**Rudometkin** was appointed interim city administrator little more than a year ago, in January 2020. The council approved him as the full time administrator only last June. Prior to working for Snoqualmie, he served in the same position for Sammamish.

Mayor Matt Larson said **Rudometkin** started in his position during a snowstorm and following flood, and later the COVID-19 pandemic. "I'm very grateful for his service," Larson said. "He's got a very positive, upbeat attitude, and I think we couldn't have been served better."

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## Internet – Newspaper Archives Searches RICK J. RUDOMETKIN

(Articles are in reverse chronological order)

Living Snoqualmie (WA) June 11, 2020

Snoqualmie City Council names Rick Rudometkin permanent city administrator Author: Danna McCall

On June 8th, the Snoqualmie City Council approved the hiring of **Rick J. Rudometkin** as its permanent City Administrator. He has served as the interim city administrator since January 3, 2020 when Bob Larson left to head the city of Gig Harbor.

According to a city news releases. **Rudometkin's** role in Snoqualmie started with a major January snowstorm, followed by February flooding, and is now managing the city's response to the COVID-19 pandemic. "This has been a very interesting and rewarding start for a new job," said **Rudometkin**. "I've had the opportunity to dive into the thick of city operations during three crises, allowing me to quickly become a member of a great team of city employees. I have the challenge of leading in the new 'abnormal' and it has taught all of us new methods for serving our wonderful community. I look forward to a long tenure here in Snoqualmie." "I look forward to working with **Rick** as we move through the current crisis and beyond," said Mayor Matt Larson. "He has proven to be a strong leader over the past six months and has gained the respect and trust of our city council and employees."

**Rudometkin's** permanent role as Snoqualmie City administrator was approved by a vote of 6-1, with Councilmember Peggy Shepard voting no. He has served in city and county government since 2003 in California, Colorado, and New Mexico, and was most recently employed at the City of Sammamish in 2019 for approximately 6 months. He entered into a separation agreement with Sammamish, which has gone through multiple city managers over the past four years.

Per the city news release, **Rudometkin's** previous positions include County Manager for the County of Eddy in Carlsbad, New Mexico; Public Works Director for the County of Eddy; Streets Division Manager for the City of Colorado Springs, Colorado; and Chief Administrative Officer for the County of Modoc, California. In addition, he worked for the City of Dana Point, California, and has nine years of experience working for an engineering/project management company.

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## Internet – Newspaper Archives Searches RICK J. RUDOMETKIN

(Articles are in reverse chronological order)

Snoqualmie Valley Record (WA) January 10, 2020

## Snoqualmie mayor appoints new interim city administrator

Author: Natalie DeFord

Snoqualmie Mayor Matt Larson has appointed former Sammamish city manager **Rick Rudometkin** as Snoqualmie interim city administrator. He takes the position left by longterm Snoqualmie city administrator Bob Larson, who is now the city administrator in Gig Harbor. The appointment was scheduled for confirmation from the city council at its Jan. 13 meeting, but that meeting has been rescheduled to Jan. 15 due to snow. **Rudometkin's** name has appeared on recent city meeting agendas, including for the Jan. 7 parks and public works council committee meeting, where he is listed among present staff.

The city of Snoqualmie put out a news release Jan. 10, announcing his appointment. "I am excited to work with **Rick**, who comes to Snoqualmie with an impressive depth and breadth of municipal governance experience that will benefit our community," Mayor Larson said in the release. The Sammamish City Council at its Nov. 19, 2019 meeting authorized the mayor to enter into a separation agreement with **Rudometkin**. He had started that position in May of 2019. He is just one of several city managers Sammamish has gone through in recent years.

**Rudometkin** was given the nine months of severance pay owed him, as per Sammamish's employment agreement with him, plus three additional months of severance pay in exchange for release of all claims and assistance with a smooth transition. That motion passed 6 to 1 with Sammamish Councilmember Ramiro Valderrama against extending the severance pay.

**Rudometkin's** resume of government experience goes back to 2003. Before he worked for Sammamish, he held other positions including for the County of Eddy in Carlsbad, New Mexico, where he worked as public works director and then county manager for about 6 years. He also worked for the city of Colorado Springs, Colorado, as streets division manager, and for the county of Modoc, California, as chief administrative officer.

**Rudometkin** is a manager with ICMA (International City-County Management Association) and also holds a Woodbury University business degree as well as several public services certifications. "I am pleased for the opportunity to serve this beautiful and vibrant community and look forward to working with the mayor, city council and residents," **Rudometkin** said in the Snoqualmie news release.

### g.

## Internet – Newspaper Archives Searches RICK J. RUDOMETKIN

(Articles are in reverse chronological order)

Sammamish Comment (WA) November 19, 2019

City Manager fired Author: Mike Mullor

The Sammamish City Council voted 6-1 tonight to authorize the Mayor to enter into a separation agreement with City Manager **Rick Rudometkin**. The vote authorized a one year severance pay for **Rudometkin**, who started last May. **Rudometkin's** contract entitled him to 9 months of severance pay. The Council voted to grant him additional three months in return for a "smooth transition" and release from litigation. Council Member Ramiro Valderrama objected to the additional three months severance.

No reason was given to the decision, likely because the decision was discussed in an executive session and is therefore confidential. The Council unanimously voted to appoint Deputy City Manager, Chip Corder, to an acting City manager.

### g.

## Internet – Newspaper Archives Searches RICK J. RUDOMETKIN

(Articles are in reverse chronological order)

https://patch.com/washington/sammamish/sammamish-city-council-picks-new-city-manager March 20, 2019

Sammamish City Council Picks New City Manager

The Council whittled down a list of five candidates in a final round of interviews conducted on Sunday.

Author: Neal McNamara

The City Council has picked a county executive from New Mexico to be the new city manager. **Rick Rudometkin** managed Eddy County, New Mexico, and was a finalist for a similar job last spring in southeast Washington.

**Rudometkin** was one of five candidates who went through a final round of interviews with the City Council on Sunday. Citizens were able to meet the finalists at a meeting last Thursday.

According to his resume, **Rudometkin** was the public works director in Eddy County before becoming county manager. The county is in a rural area in southeast New Mexico along the Texas border. He holds degree in business management from Woodbury University in Burbank, Calif.

Last spring, **Rudometkin** was one of two finalists for the county manager job in Clark County. In 2015, he lost a bid to become county manager of Bernalillo County, which is where Albuquerque is.

### g.

## Internet – Newspaper Archives Searches RICK J. RUDOMETKIN

(Articles are in reverse chronological order)

http://cqrcengage.com/asce/app/document/29478789;jsessionid=vcwznv3xvdbfx8zptmxzqs06

ASCE-August 18, 2018

## **Eddy County Board of County Commissioners unanimously approve right-to-work ordinance**

The Eddy County Board of County Commissioners adopted a right-to-work ordinance that would prevent employees from being required to pay membership dues or join unions. The commission unanimously approved the ordinance July 17.

Eddy County Manager **Rick Rudometkin** recommended that the county proceed with the adoption of the ordinance despite an ongoing lawsuit against Sandoval County by two unions regarding right-to-work in New Mexico.

Carla Sanntag, a representative of the nonprofit New Mexico Business Coalition, said data has proven right-to-work benefits workers, economies and business. "Wages go up. Real disposable income is generally \$2,200 higher than in states without," Sanntag said. "Thank you for putting your citizens and those in New Mexico ahead in your decision today."

County Commissioner Stella Davis said she hopes the ordinance will encourage business to move into Eddy County. 'I think New Mexico needs to move forward on this. It's important for site selection; we've heard our local department of development and the Artesia department of development say how important it is to them. It costs more money to do business in New Mexico and I think we need to show the rest of the country that we are business friendly." Davis said.

New Mexico State Rep. Cathrynn Brown (D-54) agreed that the ordinance may prove Eddy County more desirable for business. "Anything the commission can do to make this a more friendly business economy would benefit us," Brown said. "I fundamentally believe that people have the right to decide what people want to belong to and what they don't. There is all kinds of testimony given about how unions are benefit from right to work ordinance because unions have to make their case about how they're benefiting the worker."

The New Mexico Federation of Labor said right-to-work laws actually have the opposite effect. "'Right to work' laws always result in lower wages and more dangerous working conditions in states where they are in effect," their website reads. "Site Selection Magazine and other research consistently ranks the availability of a skilled, educated workforce as a top driver of economic activity.

"'Right to Work' laws will deeply harm existing union apprenticeship programs and training facilities that do the invaluable work of certifying New Mexico's next generation of highly skilled craftsmen and women."

## g.

## Internet – Newspaper Archives Searches RICK J. RUDOMETKIN

(Articles are in reverse chronological order)

County Commission and Chair of the board Susan Crockett voted in favor of the ordinance despite the controversy over the issue. "I think this is something politics needs to stay out of," Crockett said. "It's about doing what is right and what is right for Eddy county, and I feel this is the right choice for us."

### What legal issues are there?

The New Mexico Federation of Labor has filed a lawsuit against Sandoval County claiming that its right-to-work ordinance is illegal. The lawsuit states two unions -- the International Brotherhood of Electrical Workers, AFL-CIO, Local 611 and the United Food and Commercial Workers, AFL-CIO, Local 1564 -- will be negatively impacted by the ordinance.

State Attorney General Hector Balderas has issued an opinion saying state law does not give counties the authority to pass right-to-work ordinances.

### Internet – Newspaper Archives Searches RICK J. RUDOMETKIN

(Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **Rick J. Rudometkin** is listed below.]

Targeted News Service (USA) July 13, 2018

### Three Earn New Mexico Certified Public Manager Designation From NM EDGE

New Mexico State University issued the following news:

Three public officials have joined the ranks of New Mexico Certified Public Manager, the feature and nationally accredited program of NM EDGE.

Lawrence Griego, Sandoval County appraiser supervisor; **Rick Rudometkin**, Eddy County manager; and Michael Steininger, New Mexico Department of Finance and Administration special director, received the top tier designation from the NM EDGE certification program.

They joined 17 public officials, who earned other designations, during the New Mexico EDGE County College graduation at the New Mexico Counties annual conference in Socorro on June 21.

NM EDGE, which stands for Education Designed to Generate Excellence in the public sector, is a program administered by New Mexico State University's Cooperative Extension Service. "The certified public manager designation is the culmination of 60 three-hour classes, plus a supervised capstone project," said Mary DeLorenzo, program director. "They have each earned their certified public official and certified public supervisor designations prior to receiving this culminating certification." The three recent graduates join 13 other county, municipal and state public officials who have earned this title.

"Completing this program has given me a wonderful sense of accomplishment," **Rudometkin** said. "As a leader, I continue to have a renewed focus and vision to be the best I can be. I am very thankful that there is a program that provides practical continuing education for those of us that serve the public."

**Rudometkin** has also earned the certified advocate for public ethics designation at an earlier date.

### Internet – Newspaper Archives Searches RICK J. RUDOMETKIN

(Articles are in reverse chronological order)

Roswell Daily Record (NM) December 7, 2017

### Eddy county leaders spend time in jail

Author/Byline: Mike Smith

Eddy County Detention Center Warden Billy Massingill gave county leaders an up close look at the inner workings of the county lock up Tuesday. "I think it's state mandated," Massingill said. Massingill added that jail operations take up 35 percent of the county's budget. "Thirty-five percent of that funding you want to be pretty in tune with what's going on with it," he said.

During the tour which included all five county commissioners and **Rick Rudometkin** county manager and Kenny Rayroux assistant county manager, Massingill told them of the staffing shortages that the jail has been with. "It's a particular craft," Massingill said of working in a jail setting. He said when he talks to children of their adulthood career activities, most want to be a police officer or doctor. "I've never had anybody say, 'I want to go to work where all the bad people are.' You have to have individuals that want to do that," he said. Massingill said once they find those people who want to work in the jail they must meet certain criteria.

Massingill said there are 15 positions within the Eddy County lock up that have been frozen for sometime due to the county's budget situation. County finances appear to be picking up and Massingill said those positions are being talked about. "The county manager and I have talked one-on-one to try and free up some of those individual spots," he said. "One of the things were trying to get accredited through the New Mexico Association of Counties and some of those criterias have guidelines and we want to meet those guidelines are people that are overseeing those guidelines."

During the tour, county officials were told of tier time. "That's a tier rotation in our Alpha pod," Massingill said. "You have one group of individuals say on the top tier that will be locked down the majority of the day and then they come out the end of the day." Massingill said inmates are able to come out and eat their meals while they are locked away. "Then at the end of the day their able to come out and take their showers and call their family. The opposite happens the next day. So their locked down and the opposite tier is now locked down for the entire day," Massingill said.

County leaders also toured the former juvenile detention facility. Massingill said it was closed down due to numbers. "The average population for a juvenile was four," he said. "Today we have three, when I first got here we were busing out or having other entities keep our adults and the peak of that number was 71." He said that was costing the county a lot in per diem. "So now what we do is the services or the individuals that we use for retention or holding our inmates we try to keep them local in Lea County or Chaves County so they can get to their courts and come back-and-forth," he said. Massingill has been the warden for three years.

### Internet – Newspaper Archives Searches RICK J. RUDOMETKIN

(Articles are in reverse chronological order)

Carlsbad Current-Argus (NM) November 9, 2017

County manager receives pay raise Salary increasing 2.5 percent to \$180,700

Author: DeJanay Booth

Eddy County Commissioners voted 4 to 1 to increase County Manager **Rick Rudometkin's** annual salary in a closed session Tuesday. **Rudometkin** was given a 2.5 percent raise, increasing his salary from \$176,300 to \$180,700.

Commission Chairwoman Stella Davis said **Rudometkin**, who became county manager in October 2013, had not received a salary increase since 2014. The increase will come from the commissioner's contingency fund.

"I really appreciate the BOCC (Board of County Commissioners) and the increase they gave me," **Rudometkin** said in an emailed statement. "(I am) looking forward to helping the BOCC move our county forward into the future."

County commissioner Jon Henry declined to give a reason for voting against the raise citing the issue as a personnel matter.

Since he was hired, **Rudometkin** has received about \$60,000 in pay increases. When **Rudometkin** was first hired he was given an annual salary of \$120,000. An annual review of his performance is part of his employment contract with the county. A cost of living adjustment and a salary comparison resulted in a salary increase – \$130,961 – in January 2014.

In November 2014, **Rudometkin's** salary was again increased by about \$42,000 – with approval from county commissioners – to \$172,000, according to county officials. County commissioners were accused of violating the Open Meetings Act when they approved the 2014 raise. There have been no other determinations regarding the actions of the Eddy County Commissioners in relation to the Open Meetings Act since then.

In January 2016, all county employees received a 2.5 percent cost of living adjustment, cacording to county officials, increasing **Rudometkin's** salary to \$176,300. "He worked hard for that," Davis said. Davis was not on the commission at the time of the 2014 allegation.

**Rudometkin** is not the highest paid county manager in New Mexico. He ranks slightly behind Lea County Manager Mike Gallagher, who is paid a \$196,267 yearly salary. According to Lea County officials, Gallagher has been county manager since 2010 and received a recent pay raise in June 2017. County managers in Bernalillo, Chaves, Santa Fe, Dona Aña and San Juan County receive an annual salary between \$140,000 and \$180,000. Sandoval, Sierra and Rio Arriba county managers earn annual salaries between \$113,000 and \$125,000. Otero County's manager earns about \$92,000 and Cibola County's interim manager earns \$75,000.

### Internet – Newspaper Archives Searches RICK J. RUDOMETKIN

(Articles are in reverse chronological order)

Carlsbad Current-Argus (NM) June 7, 2017

### County OKs \$125K for brine well

Commissioners say state left them with no choice but to contribute the funding

Author: Adrian C. Hedden

County officials said they were "blackmailed" by the state of New Mexico into approving a \$125,000 appropriation for studies of the Carlsbad Brine Well to prevent its collapse. Commissioners said Tuesday they had no other choice but to contribute the funds to get the problem solved, despite their insistence that the state is to blame for the danger posed by the brine well.

Carlsbad and Eddy County leaders said in recent public meetings that the state should take responsibility for the brine well. The state collected profits from the well which it licensed and ultimately decided to close in 2008 when the ground was found unstable.

"Call it blackmail, call it coercion," said County Manager **Rick Rudometkin**. "Bottom line is they wanted some skin in the game. We're going to get sued regardless if that thing falls."

Vice Chair Susan Crockett moved to add language to the resolution absolving the county of liability. "Eddy County is accepting no ownership of the Carlsbad Brine Well," Crockett said before the vote. "We're only approving the money of the appropriation to go to the state."

Commissioner Jon Henry voiced his displeasure at the vote. "We're putting \$500,000 to see if we can fill a hole," he said. "We're not actually using it to fill the hole. That's great. I'm entirely against it, but if that thing falls, with the economic impact to Carlsbad, what choice do we have?" But Crockett and Chair Stella Davis could not deny the importance of fixing the well by any means necessary. "If we don't do this, it's going to put a target on us with our constituents," Crockett said.

Davis said she heard concerns from Carlsbad residents, especially in the southern area of the city, urging officials to find a solution soon. "It's not if it collapses, it's when," Davis said. "I know a lot of constituents have asked us to please put the \$75,000 in."

The county and City of Carlsbad both initially approved \$50,000 each earlier this year under the assumption the state would contribute \$400,000. In April, House Bill 2 was passed by the Legislature requiring Eddy County and the City of Carlsbad together to come up with half of \$500,000.

Carlsbad city councilors approved a \$125,000 line item in the city's budget and are planning to vote for final approval at a June meeting. The money will be used to study the brine well which is danger of collapsing and creating a massive sinkhole that experts said would destroy infrastructure and kill residents.

#### g.

### Internet – Newspaper Archives Searches RICK J. RUDOMETKIN

(Articles are in reverse chronological order)

Experts testified before state house and senate committees during the regular New Mexico Legislative session that remediation would cost up to \$25 million, while the well's failure would cause up to \$1 billion in damages and litigation. The study will ultimately result in a Request for Proposals (RFP) to begin construction efforts to remediate the well before collapse.

District 1 Commissioner James Walterscheid, whose district contains the potential sinkhole, said the money the state did earmark for the well was not something to scoff at. "This is the fix they came up with," he said. "We may not like it, but this is it. I can't believe we got a dime. I was shocked. We ought to be thankful. I don't think we have a choice."

The Carlsbad Brine Well Remediation Advisory Authority will convene July 1. They are tasked with finding a solution to the brine well. Members will be from Carlsbad, Eddy County and New Mexico governments.

### Internet – Newspaper Archives Searches RICK J. RUDOMETKIN

(Articles are in reverse chronological order)

Carlsbad Current-Argus (NM) May 26, 2017

#### **Commission OKs tax hikes**

Residents, officials express opposition to the three new ordinances

Author: Maddy Hayden

Correction: District 2 County Commissioner Jon Henry voted against an ordinance raising gross receipts tax to pay into the state's Safety Net Care Pool Fund. District 3 Commissioner Larry Wood voted in favor of the ordinance. Their votes were incorrect in a Friday story in the Current-Argus.

Taxes paid by Eddy County residents will increase as of Jan. 1, 2018, after the county commission voted to pass three new gross receipt taxes on Tuesday morning. All three ordinances were met with opposition from members of the public, elected officials and commission members.

The first, a 1/12 of 1 percent levy to be paid into the newly created Safety Net Care Pool Fund, was approved by all commissioners but District 3 Commissioner Larry Wood.

A 1/8 of 1 percent gross receipts tax to benefit the Eddy County Detention Center passed 4-1 with District 2 Commissioner Jon Henry dissenting. Henry also voted against the third ordinance, a 1/8 of 1 percent general purpose gross receipts tax, as did District 1 Commissioner James Walterscheid.

The third ordinance was amended to include a sunset date of Dec. 31, 2019, at which point county manager **Rick Rudometkin said** the county will reevaluate the state of the oil and gas industry in the area.

All told, the increases equal an extra 30 cents for each \$100 spent by consumers on services, with food and medicine excluded.

Tensions ran high at times as several Artesia residents expressed opposition to the increases. The additional taxation will increase the city's gross receipts tax rate to 8.15 percent, above the 8 percent "magic number" **Rudometkin** said can adversely affect business transactions.

### Internet – Newspaper Archives Searches RICK J. RUDOMETKIN

(Articles are in reverse chronological order)

Carlsbad Current-Argus (NM) May 5, 2017

### County slashes budget before approval Several reductions in works to shore up revenue deficit, counter expanding cuts

Author: Adrian C Hedden

Several budget cuts are being planned by Eddy County to account for shortfalls in revenue and increased state cuts. Last year's total funding for the county was about \$110 million, while this year's cuts brought funds down to about \$99 million. Budget losses were attributed to millions of dollars in unfunded state mandates, along with losses in tax revenue from the oil and gas industry.

Commissioners feared more state cuts could be coming as New Mexico lawmakers are expected to enter a special session this month to grapple with the state's still unapproved budget. The proposed county budget was presented to Eddy County commissioners at Thursday's special meeting for final changes before it is brought back for approval via a vote at a May meeting.

The budget presented to commissioners was balanced, with a \$300,000 in contingency funds. Commissioner Jon Henry proposed freezing any staff raises in the upcoming fiscal year to save money and worried the county would have to make salary reductions. County **Manager Rick Rudometkin** said the county has never had to make salary reductions.

"I would rather do no increases now rather than doing a salary reduction in the future if it's going to be as bad as we think it is," Henry said. "I would rather protect our staff now." After a divisive and unpredictable state legislative session, Henry argued for funding for lobbying services for both Artesia and Carlsbad. He said lobbying efforts should be focused on Santa Fe. Artesia's lobbying budget was initially cut completely, while Carlsbad's was set at \$90,000. Commissioners agreed to split the funding evenly between each city to use to lobby next year.

"What we heard in Washington is the Trump administration is pushing everything to the states," Henry said. "It's going to be devastating to us, because we have a very confused, liberal state. We need to stay proactive or we're going to lose. If we don't spend more in Santa Fe, we're going to regret it."

Funding for professional services in Carlsbad, Artesia, Hope and Loving was reduced by almost half in each community. **Rudometkin** said funding was lower than the cities had requested in all four cases. "They can ask for the moon, but we can't afford the big numbers," he said. "They have to provide services either way. We would love to give the cities more money, but we just don't have it."

Carlsbad's funding in FY 2017 was at \$571,000, but next year was reduced to \$250,000. Artesia saw a reduction from \$360,000 to \$150,000 Hope went from \$33,300 to \$10,000 and Loving was dropped from \$58,500 to \$20,000.

### g.

# Internet – Newspaper Archives Searches RICK J. RUDOMETKIN

(Articles are in reverse chronological order)

Professional service agreements, which appropriated county funding to several public organizations throughout the Eddy County, were also on the chopping block at Thursday's budget workshop with county commissioners.

Compared with fiscal year 2017's budget, next year's budget initially cut about \$557,000 to the PSAs, removing county funding from almost all of the agreements. Commissioners used almost all the county's contingency money replacing funds to multiple PSAs.

Contracts could be negotiated with PSAs in the future, but funding put in the budget will insure limits are set, **Rudometkin** said. "It's a place holder," he said. "We can go out and negotiate, but what if they request more than we have? PSAs are the big thing for discussion. They're very political."

### Internet – Newspaper Archives Searches RICK J. RUDOMETKIN

(Articles are in reverse chronological order)

Carlsbad Current-Argus (NM) February 8, 2017

#### County deals with budget woes

Author: Adrian C Hedden

Eddy County is preparing for a continuously declining budget due to shrinking revenue from the oil and gas industry and unfunded state mandates. The Eddy County Board of Commissioners received a review of its finances at Tuesday's meeting led by Finance Director Roberta Smith and County Manager **Rick Rudometkin**.

Eddy County budgeted \$19.5 million for oil and gas during the 2015-2016 fiscal year. The county's expected budget this year is \$15.7 million, about \$4 million less. And with the county's general fund showing a \$1.6 million deficit, officials are looking to find alternative sources of revenue and preparing to finalize the adjusted budget before bringing it to the commission for approval. "We get a lot of flak for overspending," Smith said. "But we have kept the budget flat. We have continued to ask the department heads to stay within the means we have."

The latest year-to-date budget report from December showed the county's revenue at \$42.4 million, 60 percent of the budgeted \$70.8 million. Expenses were held at \$53 million, or 45 percent of the \$119.4 million expected. This leaves revenue at about \$10 million less than expenses.

Despite the declines, **Rudometkin** said the county needs to stay focused on improving infrastructure and repairing county buildings. He said to avoid spending on repairs could lead to higher costs in the future. "We've had commissions that were conservative. Nothing wrong with that," he said. "But when you don't fix things, you end up paying for them later when things cost more. Some things have to get done. Big picture is very important."

**Rudometkin** pointed to unfunded mandates imposed by the state legislature as creating a burden for Eddy County. He said taxes have been raised recently to counter money being taken for the state's initiatives. "I'm not a fan of taxes. I don't like taxes," **Rudometkin** said. "But they are what runs government."

Cuts to public service agreements the county holds with several local non-profit organizations are predicted soon, **Rudometkin** said. He estimated some PSAs could see funding cut by up to 25 percent. **Rudometkin** said he is planning to send a notification to all non-profits that operate under PSAs with Eddy County to inform them of the impending cuts. "I've no choice but to recommend cuts," he said. "We need to replace what the state has stolen, what the state has mandated we give them."

**Rudometkin** said the county will have to send the state \$5 million next year if the legislature decides to impose additional costs on the county for Medicaid expenses during its current session.

### **Section 9**

# Internet – Newspaper Archives Searches RICK J. RUDOMETKIN

(Articles are in reverse chronological order)

BOC Chair Stella Davis said the state mandates are leaving the county struggling in making up the difference. She questioned where the money the state received from the county during the oil boom two years ago went. "I want the community to know Eddy County is going to do everything they can to make it better," Davis said. "But when your hands keep getting tied by the state it's hard. They've constantly got their hand out. What did they do with all the oil and gas money when times were good?"

### Internet – Newspaper Archives Searches RICK J. RUDOMETKIN

(Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **Rick J. Rudometkin** is listed below.]

ICMA-https://icma.org/articles/article/members-recommended-receive-credential-december November 22, 2016

Twenty-seven ICMA members have been recommended by the Credentialing Advisory Board to receive ICMA Credentialed Manager or Candidate status in December.

The ICMA Credentialed Manager (ICMA-CM) designation has become widely respected, frequently requested in recruitment of positions, and cited in positive media coverage of public stewardship. Congratulations to the following members, who have been recommended by the Credentialing Advisory Board to receive ICMA Credentialed Manager or Candidate status in December.

ICMA Credentialed Managers are professional local government managers qualified by a combination of education and experience, adherence to high standards of integrity, and an assessed commitment to lifelong learning and professional development. Objections must be filed in writing to the ICMA Executive Director (via credentialing@icma.org) and received by December 16, 2016.

ICMA Credentialed Manager Candidates **Rick J. Rudometkin,** Carlsbad, NM

### g.

# Internet – Newspaper Archives Searches RICK J. RUDOMETKIN

(Articles are in reverse chronological order)

Carlsbad Current-Argus (NM) October 5, 2016

#### Rudometkin contract renewed

Author: Jessica Onsurez

Eddy County commissioners reviewed the performance of County Manager **Rick Rudometkin** in a closed session Tuesday. Royce Pearson, chair of the Board of County Commissioners, said that no changes were made to **Rudometkin's** current salary or benefits. "In essence there were no revisions, it (the contract) was renewed with no changes for one more year," Pearson said following the meeting.

**Rudometkin's** contract wasn't adjusted in 2015 either after an annual review, when then-Commission Chair Susan Crockett said raises for county employees were also on hold because of budget issues. **Rudometkin** was hired in 2013 with an annual salary of \$120,000. An annual review of his performance is part of his employment contract with the county. A cost of living adjustment and a salary comparison resulted in a raise in his salary to \$130,961 in January 2014. His current annual salary is \$172,000, according to county records.

### Internet – Newspaper Archives Searches RICK J. RUDOMETKIN

(Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **Rick J. Rudometkin** is listed below.]

Roswell Daily Record (NM) September 10, 2016

# Grand jury's disbandment not to be appealed; New grand jury initiative unfolding in Eddy County

Author/Byline: Jtucker

**Eddy County petition** 

Marcy Britton of Albuquerque, who in 2001 spearheaded a citizen-petition grand jury in Valencia County to investigate claims of animal cruelty at the Valencia County animal shelter, is organizing a citizen-petition grand jury in Eddy County to investigate claims of wrongdoing. Britton said she was contacted by Eddy County residents to help launch a citizens' petition for a grand jury investigation because she has successfully done them in Torrance and Valencia counties.

"We, the undersigned registered voters of Eddy County, hereby petition the judges of the Fifth Judicial District, pursuant to Article II, Section 14 of the New Mexico State Constitution, to convene a grand jury to investigate allegations of malfeasance, conspiracy, misappropriation of funds, misrepresentation of Eddy County manager's contract, salary increases of Eddy County manager and/or any other illegal or fraudulent acts occurring in Eddy County, New Mexico, committed by any individual(s) associated with or employed at any time by Eddy County," the petition states.

Britton told the Daily Record Friday she's shooting for 800 signatures to meet and exceed the threshold of 2 percent of Eddy County's registered voters. "Citizens in Eddy County are frustrated with their efforts to get the (Attorney General) and (Office of the State Auditor) to investigate exorbitant raises given by the Eddy County commission to the County Manager **Rick Rudometkin,"** Britton said Friday. "In 13 months, he has received a 44 percent increase going from \$120,000 to 172,000."

Britton said the Attorney General's office found multiple examples of Open Meetings Act violations by the Eddy County commission. "They gave the county the chances to re-vote on everything, but people are very frustrated about that, because they didn't see any of this in action," she said. "All the county commissioners did was just vote on it. It wasn't open for public discussion. It was thrust on the county, this raise. "They may not have even realized they were violating the Open Meetings Act. They may not have realized that in this economy, and with Artesia just facing the 10 percent cut in salaries, that this was not an appropriate use of taxpayer money to pay this guy such an exorbitant raise. And it's not in his contract either. His contract specifies he can get a cost of living increase and an annual review, nothing like the 44 percent raise in 13 months. That is not in his contract." Britton encouraged registered voters in Eddy County interested in signing the petition to call her at 505-292-1472.

### Internet – Newspaper Archives Searches RICK J. RUDOMETKIN

(Articles are in reverse chronological order)

http://www.dchieftain.com/news\_stream/new-mexico-association-of-counties-workers-compensation-self-insurance-pool/article\_1e1b12d0-3e27-11e6-a7fd-c7d6a5a6f683.html June 29, 2016

# New Mexico Association of Counties' Workers' Compensation Self-Insurance Pool elects board members

Jun 29, 2016 🔍

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**SANTA FE** – The New Mexico Association of Counties (NMAC) held its 80<sup>th</sup> Annual Conference in Lea County the week of June 20. Member representatives of the Workers' Compensation Self-Insurance Pool attended the Pool's annual general membership meeting in Lea County on June 22 and held elections for geographic district Board of Director positions.

The Board welcomes one new member: Eddy County Manager Rick Rudometkin, who represents geographic district 4, comprised of De Baca, Roosevelt, Lincoln, Chaves, Otero, Eddy and Lea Counties. Rick was elected to the board at its May 12 meeting to fill a vacancy left by Chaves County Public Services Administrator Brenda Sanchez and was elected by the membership to serve the current two-year term. Rick also serves on the Multi-Line Pool Board of Directors and was elected secretary/treasurer at its March 9 meeting.



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### Internet – Newspaper Archives Searches RICK J. RUDOMETKIN

(Articles are in reverse chronological order)

Carlsbad Current-Argus (NM) June 8, 2016

County speaks on OMA issues Commission is still facing opposition after violations

Author: Connie Lee

Eddy County Commissioners faced contention from two residents regarding the previous board's violations of the Open Meetings Act during a board meeting Tuesday. The New Mexico Office of the Attorney General found the previous board to be in violation of the OMA for failing to provide specific descriptions for multiple 2014 commission meetings, according to a May letter to the commission. The current commissioners were given the opportunity to cure the violations at Tuesday's meeting by voting again on the past closed meeting items.

Cas Tabor, the county's attorney, said he discussed the letter with the Office of the Attorney General following the finding of the violations. The letter said county employee raises, including one given to County Manager **Rick Rudometkin**, were invalid because they had been approved in closed meetings with generic agenda descriptions. **Rudometkin's** salary was increased twice in 2014, raising his salary from \$120,000 per year to \$172,000 a year in total, according to documents in the AG's letter. **Rudometkin** declined to comment.

But Tabor said Tuesday that the employee raises were not approved in closed meetings, but rather in open budget meetings. "They looked at the April 15 and the May 6 minutes and then weren't able to visualize the fact that there was a closed session and then there was a budget meeting where personnel salaries, capital outlay, all the different aspects of budgeting (were discussed)," Tabor said. "Every department of the county was discussed in an open meeting April 15 and May 6."

He said the AG's office dropped multiple violations, but that he agreed to keep the raises on the agenda for Tuesday's meeting. "They admitted their confusion about the votes that were at the end of these budget hearings," Tabor said about his discussion with the AG's office. "And that's why a number of the items were withdrawn and only these six were put on the agenda today." However, one resident was unsatisfied with the explanation and raised his voice from the back of the room.

"You're having this meeting because you did not give the public an opportunity to comment before you voted," said Dan Banks, an Eddy County resident. County commissioner Royce Pearson ended Bank's comment by asking if he would like to be escorted out of the room. "Royce, you're going to have to escort a bunch of people out if you do that," said Ronald Barron, the resident who filed the original complaint to the AG's office.

The raises continued to be a hot topic of discussion at the end of the meeting as well, when both Banks and Barron decided to give public comments. Banks shifted his speech to address the same issue that he had brought up earlier in the meeting. He said the county's residents did not

### Internet – Newspaper Archives Searches RICK J. RUDOMETKIN

(Articles are in reverse chronological order)

have enough notice prior to the raises and that the county manager and assistant county manager were paid too highly. "Eddy County is the second highest paid management team in the State of New Mexico," Banks said. "What are we getting for \$304,000?"

Barron continued to denounce the vote made by the current board earlier in the meeting, saying that because some of the commissioners were not present on the board at the time of the raises, they were not qualified to vote. "How can someone that wasn't here, in the commission, wasn't county commissioner, make motions to vote on something that they weren't in closed session for?" Barron asked. "That I don't understand."

Three members of the current board, including Susan Crockett, Glenn Collier and Royce Pearson were members of the board at the time. Stella Davis and James Walterscheid were not.

Five other 2014 agenda meeting items found to be in violation of the OMA, including a motion to join a lawsuit involving the Endangered Species Act, were also passed at Tuesday's meeting.

### Internet – Newspaper Archives Searches RICK J. RUDOMETKIN

(Articles are in reverse chronological order)

Carlsbad Current-Argus (NM) April 20, 2016

### Revenues affect county salaries

Author: Connie Lee

With the downturn in the oil industry, Eddy County's plans for the fiscal 2016-2017 year budget may include cuts for all departments, freezes on all county employee salaries and on allocated positions in order to cut trim close to \$17.2 million off the budget.

County Manager **Rick Rudometkin**, Assistant County Manager Kenney Rayroux and Finance Director Roberta Smith presented the proposed budget to Eddy County Commissioners at Tuesday's meeting. Many of these actions were suggested in a letter from New Mexico's Department of Finance and Administration.

**Rudometkin** said when the county originally began planning for the next fiscal year, they had to find ways to cut about \$17.2 million. Adding in the freezes and cuts allowed them to drive down the number and create the final balanced budget of about \$76 million. The freezes would prevent county employees from receiving pay raises and promotions for the fiscal year. It would also prevent hiring additional allocated staff, excluding public health and safety positions during that same time frame.

**Rudometkin** said although the upcoming year would be tight, but the plan lacks any employee layoffs and would still allow the county to perform their usual activities. "Yes, it's hard to freeze raises and not give employees raises. Yes, it's hard to freeze allocated positions when we really need them," **Rudometkin** said. "Yes, it's hard to take material out of the road department when we need to fix roads. However, we can still function, we can still operate this next fiscal year, which is way more important than those other items."

Rayroux explained that capital requests, such as new vehicles and equipment, were calculated into the original \$17.2 million. By including the requests in the \$17.2 million, the county would be able to potentially grant them at a later time if revenue picked back up. "We asked them to include those things so that if things started turning around and they come back, they're going to be able to say honestly and truly to you, yes that was in our budget," Rayroux said.

However, the commission decided not to decrease Public Service Agreement (PSA) funding, which is used to contribute money to non-profit organizations. They plan to keep the amount the same by using \$189,000 from the contingency fund, which is money set aside for unforeseen circumstances or losses. PSA funding underwent a 10 percent cut last fiscal year.

Multiple commissioners said they understood the need to tighten their belts, but some disagreed on whether or not they should cut PSA funding by an additional 10 percent this year. Commissioner Stella Davis said she thought it would be fair to decrease their funding. "We're

### **Section 9**

# Internet – Newspaper Archives Searches RICK J. RUDOMETKIN

(Articles are in reverse chronological order)

asking our county to give up money, to give up things, and yet we're not asking our PSA non-profits to give up anything," she said. "And I think the pain has to be across the board." Commissioner Susan Crockett said she was against the cut and suggested strengthening their communication with the non-profit groups. "I'm not in agreement to cut them 10 percent this year," Crockett said. "I am in agreement that we meet with them and start letting them know so they have a year to start planning their budgets, because they're all in budget time right now and 'whammo' we're going to do another 10 percent when they are providing a service, they are constituents."

**Rudometkin** said the budget will be adjusted to reflect the decision on PSA funding and presented to the commissioners May 3 for approval.

### Internet – Newspaper Archives Searches RICK J. RUDOMETKIN

(Articles are in reverse chronological order)

Carlsbad Current-Argus (NM) April 15, 2016

REDA board approves budget \$1.5M deal reflects 7.31% cut from 2016

Author: Jessica Onsurez

A \$1.5 million budget for fiscal year 2017 was approved by the board of the Regional Emergency Dispatch Authority (REDA) Thursday in Artesia.

Director of REDA, Robbie McCormick presented a budget to the board members that she said had been cut back to reflect dwindling revenues for Eddy County representing a 7.31 percent decrease from the 2016 fiscal year. That budget includes a freeze on salaries for the staff of the dispatch authority and virtually eliminates over time, a move that McCormick said she discussed with staff prior to the presentation of the budget.

Board Member Vernon Asbill suggested that given the situation with revenues in the county and municipalities, future consideration might be given to not only pay freezes but salary cuts for staff at the dispatch authority.

McCormick said that she would prefer to eliminate positions rather than cutting salaries, should the situation warrant the consideration. McCormick told board members the approved budget also reflects choices to go with free or reduce administrative and operation costs, adding that it would be necessary to review those cost-saving solutions in 2018.

The budget was approved unanimously, but not without significant discussion. **Rick Rudometkin**, Aubrey Hobson, Vernon Asbill and Phil Burch were all present at the meeting. When asked by **Rudometkin**, president of the board and Eddy County manager, if the budget presented was adequate for the fiscal year and wouldn't require adjustment, McCormick said that she was confident the facility could manage through the fiscal year.

Board members also touched the subject of the dispatch authority's mandated Criminal Justice Information Services (CJIS) compliance; REDA has not been CJIS compliant in five years board members said, putting them at risk of closure.

It's a situation that McCormick said in the meeting isn't helped by present revenue difficulties. REDA serves as a consolidated dispatch center that takes non-emergency as well as 911 calls for Eddy County, excluding the city of Carlsbad. They serve the Eddy County Sheriff's Office, the Village of Loving, Hope, Artesia Police and Fire Departments and Eddy County Fire Services. The board will meet again May 19 at 11 a.m. at the Artesia City Council Chamber, 512 W. Texas Street in Artesia.

### Internet – Newspaper Archives Searches RICK J. RUDOMETKIN

(Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **Rick J. Rudometkin** is listed below.]

US Fed News (USA) February 6, 2016

# NEW MEXICO EDGE GRADUATES 13TH CLASS DURING COUNTY ASSOCIATION'S LEGISLATIVE CONFERENCE

New Mexico State University issued the following news release:

A graduating class of 40 public servants received certification in their fields recently through an education program administered by New Mexico State University's Cooperative Extension Service.

The nationally accredited New Mexico Certified Public Manager program administered by NM EDGE, which stands for Education Designed to Generate Excellence in the public sector, graduated its 13th class of public servants at a recent ceremony during the Legislative Conference of the New Mexico Association of Counties held in Santa Fe.

Since 2008, the program has certified 314 public officials with one or more designations. "We are proud to continue to bring new designation curriculum into our program," said Jon Boren, NMSU assistant dean and director of the extension service. "We strive to provide meaningful training to help our public servants to have better government through education."

Receiving designations were:

\* Eddy County: Rick Rudometkin, county manager, certified public official.

### Internet – Newspaper Archives Searches RICK J. RUDOMETKIN

(Articles are in reverse chronological order)

Carlsbad Current-Argus (NM) December 19, 2015

County receives clean audit for 2014-15 Finance department implements change

Author: Jessica Onsurez

County officials are pleased with the results of the 2014-2015 budget audit which received a modified opinion from the state auditor's office. "A clean audit is the goal of every agency," said County Manager **Rick Rudometkin**. "Coming to Eddy County and having this done is tremendous for all of us."

**Rudometkin** said that being good stewards of taxpayer money was part of the goal for county officials and the county finance department whose priority this cycle was to address findings in previous audits.

Previous yearly audits for Eddy County have been disappointing; in 2011 the county received a "disclaimer," and has had several findings in following years.

Finance Department Director Roberta Smith said that the finance department staff has hurdled several challenges in getting to this point. Those changes included addressing internal policy, inventorying around \$76 million in fixed assets, updating to electronic timekeeping and taking a new financial system live.

"All (administrators) our vision was to move forward more with technology, we wanted to go to a financial system that everyone could be on and it was a huge deal," Smith said. "Basically from January to the time we got audited in August of this year we made huge changes," Smith said. County officials are hoping that the clean audit will have positive repercussions for the county.

"This is a tremendous way to end our calendar year," said Commission Chairwoman Susan Crockett during Tuesday's commission meeting. "This is excellent news and what we've been striving for my three years on commission." "It's not just having the clean audit and knowing we are responsible and financially we're able to be accountable," she said adding that the county can benefit in eligibility for bonding and grants in addition to acting as fiscal agents.

While Smith said the long hours and hard work of the finance staff have paid off, the work continues to keep the trend going. "It's still going to be a challenge to stay on top," Smith said, citing that the largest challenge is implementing changing policies which are driven by regulations and requirements from the state auditor's office.

### Internet – Newspaper Archives Searches RICK J. RUDOMETKIN

(Articles are in reverse chronological order)

Carlsbad Current-Argus (NM) October 21, 2015

### **Eddy County manager not given raise**

Author: Current-Argus Staff

The county commission decided not to give the county manager a raise after his annual performance review.

"We as a BOCC (Board of County Commissioners) continue to be pleased with and support our county manager, **Rick Rudometkin**," said commission chairwoman Susan Crockett. "This has nothing to do with his performance whatsoever."

Crockett said that the decision not to give **Rudometkin** a raise has to do with the budget that the county passed this fiscal year.

Because the budget was zero-based, it allowed only for cost-of-living adjustments for employees, not actual raises. "We as a BOCC could not constitute a raise for our county manager when we could not give a raise to county employees," Crockett said. "Our county manager can ask for his contract to be reviewed at any time."

The commission conducted **Rudometkin's** performance review Tuesday during a closed session. No action was taken when the commission resumed the open meeting, meaning no changes, salary or otherwise, were made to **Rudometkin's** original contract from when he was hired two years ago.

**Rudometkin** has received cost-of-living increases and raises since signing the original contract. His current annual salary is \$172,000.

# Internet – Newspaper Archives Searches RICK J. RUDOMETKIN

(Articles are in reverse chronological order)

Carlsbad Current-Argus (NM) October 20, 2015

### Officials to review county leader

Author: Katie J England

Eddy County's chief administrative officer will be undergoing a performance review, which could mean changes to his contract. The county commission will discuss County Manager **Rick Rudometkin's** performance in a closed session during its regularly scheduled meeting at 8:30 a.m. today.

Each of the five county commissioners received a written evaluation form that he or she will fill out and bring to the session. "We'll get copies of what they wrote, go over and discuss it," said Commission Chairwoman Susan Crockett. "We'll talk to **Rick**, then probably have more discussion without him in the room."

The commission will then come out of closed session to make changes, if any, to **Rudometkin's** contract. The county manager is evaluated once a year, according to the original contract.

**Rudometkin** was hired by the county two years ago, with a contract outlining a \$120,000 annual salary. A cost of living adjustment and a salary comparison resulted in a raise in his salary to \$130,961 in January 2014, said Cas Tabor, Eddy County attorney.

**Rudometkin** then received positive feedback at his interim performance review and first annual performance review, resulting in increases which raised his annual salary to its current rate of \$172,000. "Last year, he (**Rudometkin**) had a good performance review," Crockett said.

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### Internet – Newspaper Archives Searches RICK J. RUDOMETKIN

(Articles are in reverse chronological order)

Carlsbad Current-Argus (NM) October 7, 2015

#### Treatment, not incarceration

Commission teams up with new initiative to help keep mentally ill out of jails

Author: Katie J England

The Eddy County commission has agreed to participate in a program to reduce the number of people with mental illness in jails. "Stepping Up" is a national initiative with more than 100 counties signed up to participate. "It's a good networking initiative, because you can talk to other counties about how they're dealing with their mental illness in jails," said Commissioner Stella Davis, who originally proposed the idea to the commission.

According to the Stepping Up website, there are 2 million adults with mental illnesses incarcerated across the nation. Eddy County Detention Center Warden Billy Massingill said that anywhere from 40 percent to 50 percent of those that come through the detention center in Carlsbad suffer from some of mental illness, often diagnosed or untreated.

"Nationally, it's a huge topic, but for the state of New Mexico, it's even bigger," said **Rick Rudometkin**, county manager. "It's on the radar as one of the number one priorities for us."

Massingill said the mental health issues he sees inmates living with range from attention deficit disorder to post-traumatic stress disorder. The program's website mentions other disorders such as schizophrenia and depression commonly found in incarcerated populations.

And while some inmates are already on medication, many are not, Massingill said. Massingill also said that mental health and substance abuse often overlap, and that those who aren't incarcerated are left to fend for themselves in the community. "This is also trying to address some of their (mental illness, non-incarcerated) needs," Massingill said. "Where can they go, where can they get help?"

Passing the resolution allows the commission access to tools such as webinars and access to experts, the website said. Stepping Up has a series of action steps that guide counties to effectively facilitate access to treatment and provide alternatives to jail time for those with mental illnesses.

Davis said that participating in the initiative is free to the county, and though it's a national program, Davis said no one will be ordering Eddy County around. "This is an organization that provides tools to local communities to look at different avenues that we can address mental health," Davis said. "They don't have a finger in our pie."

### Internet – Newspaper Archives Searches RICK J. RUDOMETKIN

(Articles are in reverse chronological order)

Carlsbad Current-Argus (NM) July 31, 2015

### County ends year with millions more than budgeted

Author: Katie England

Eddy County commissioners were relieved to hear Friday that the county ended the 2015 fiscal year with millions more than it had budgeted for. The original budget showed the county ending the fiscal year June 30 with a nearly \$2 million deficit. Instead, there was a \$4.5 million surplus, meaning that some cuts made for the 2016 fiscal year can be negated.

Revenue came in at \$47 million rather than the \$42 million budgeted, and the county spent about \$1.4 million less than it had budgeted for expenses, said county Finance Director Roberta Smith. Though county officials had expected oil and gas revenues to keep the county from ending \$2 million in the hole as budgeted, they had not expected to have such a large surplus.

"We were not anticipating it being there," said County Manager **Rick Rudometkin**. "We anticipated it being about \$2-3 million. But we are very proud that it is a little bit over, because of the way oil and gas and everything else was."

The commissioners have made drastic cuts to next year's county budget over the past few months, cutting a \$10 million deficit down to zero in order to balance the budget. Every county department was affected as items such as vehicles or computers that are not automatically rebudgeted were denied for every department.

The county has now moved funds from the general fund to other county funds to purchase equipment that was previously denied by the commission. "I was glad to see money getting put back in for necessary items," said Royce Pearson, who acted as commission chairman in the absence of Chairwoman Susan Crockett.

The \$28.6 million left in the general fund at the end of the year also drew some negative attention from the state. "Because we had such a surplus, we were actually kind of targeted by the (state) auditor's office because we had such a high balance of unrestricted funds in our general fund," Smith said.

**Rudometkin** said that the auditor's office will sometimes target entities that have too much money in unrestricted funds because they want the tax dollars spent to benefit the taxpayers. As a result, a total of nearly \$14 million was transferred out of the general fund, including \$4 million to the road fund, \$1.5 million for the fire service complex, \$1 million to purchase vehicles for the Sheriff's Office, \$100,000 to the IT department and \$5 million to the capital improvement fund.

The \$5 million in the capital improvement fund can be used by the commission to grant requests from departments that were denied during the first budget go-round. "They (departments) will

### Internet – Newspaper Archives Searches RICK J. RUDOMETKIN

(Articles are in reverse chronological order)

come back to you (the commission) for the next three to six months, I imagine," **Rudometkin** said, adding that should the commission choose to deny those departments' requests, the money would stay in the capital improvements fund. After that transfer, there is still \$14.7 million left in the general fund, which is well above the \$8.8 million that the state requires the county to keep in reserve.

Commissioner Stella Davis cautioned that the commission still needs to be careful with the money. "We ended the year really well," Davis said. "That doesn't mean we have to spend all that money."

Davis also mentioned that, although she was happy to see \$4 million go to roads, that wouldn't go very far in fixing county roads. She said that "\$4 million is going to be gobbled up pretty quickly," emphasizing that she still thinks implementation of a two-eighths of one percent Hold Other changes made in the budget included cutting 15 percent from the commissioners' and county manager's travel budgets.

Many cuts made to the budget, including across-the-board 10 percent cuts to Public Service Agreements such as the service agreement with the city of Carlsbad, were left in place. Smith said that the balanced budget and surplus cash bode well for next year's audit. "This time last year, we weren't even balanced for the fiscal year," Smith said. "So we're already way ahead of schedule. I'm really confident that we'll get a good audit this year.

### Internet – Newspaper Archives Searches RICK J. RUDOMETKIN

(Articles are in reverse chronological order)

Carlsbad Current-Argus (NM) June 25, 2015

#### **Eddy County Commission passes tax increase**

Author: Jessica Onsurez

An amended ordinance passed Thursday by the Eddy County Commission established a one-eighth of 1 percent increase of the gross receipts tax, which will generate money for unfunded mandates in the county. The approved ordinance also leaves the issue of an additional two-eighths percent increase to help fund road construction and repairs in the county up to the voters.

County Commissioners Royce Pearson, Glenn Collier and James Walterscheid voted in favor of the amended ordinance, proposed by Pearson. It passed 3-2. "I think we're all glad to be moving forward," said County Commission Chairwoman Susan Crockett, despite having voted against the amended ordinance. Commissioner Stella Davis was the second dissenting vote.

Even though County Manager **Rick Rudometkin** recommended that the county commissioners adopt the ordinance as written, Commissioner Vice Chairman Pearson instead proposed the amended version. The original Hold Harmless Gross Receipts tax proposal, which had been in consideration since April, would have implemented a three-eighths of a percent increase on any person engaging in business in the county, including municipalities.

The full three-eighths increase would have generated around \$15 million for the cash-strapped county. Instead the county will see about \$5 million come into the general fund next year, or about 1.25 cents for every \$10. That money will go toward unfunded mandates, including courthouse and detention center operations and renovations to the Eddy County Courthouse. Millions are also slotted to go to the state to help cover the county's share of Medicaid and the safety net care pool.

While public comments from the residents of Eddy County were few, those who spoke were strongly opposed to the additional two-eighths increase. "I suppose we have this new ordinance, but I feel it's deceptive," Regina Ballard said. "People say, 'Well, do you want the roads fixed or not?' as if that was the only choice you have."

But former Commissioner Tony Hernandez, who also spoke during public comments, said that the county's options are indeed limited when it comes to finding funds to address issues with county roads. "We're looking at \$190 million to fix roads that do not involve FEMA. That's a lot of money. You don't have that in the reserves. Where are you going to get it from? You're not, unless you impose this tax."

Hernandez formerly represented the southern district of Eddy County which has seen a growth in the amount of traffic generated by the oil and gas industry. Crockett said that area of Eddy County has been hit the hardest by the deterioration of roadways.

### Internet – Newspaper Archives Searches RICK J. RUDOMETKIN

(Articles are in reverse chronological order)

"Seventy-five percent of (deteriorated) roads are in the southern part. I feel for those people. I lived down there, I drive down there and it saddens me," Crockett said. Crockett voiced her intent to vote in favor of the ordinance as presented without amendments. "If we don't do this, there's going to be no major projects, no loop road, no nothing," Crockett said.

The amended versions did not receive Crockett's vote. Davis also didn't approve of the changes that would have put off the issue until a November election. "I'm not for taxes; I have a husband who's not for taxes, but he's driving these roads with me and even he said we need to do something now," Davis said. "It's crucial that we bring our roads up to standard. I don't know what else to say except that there's liability out there. We have to get those (roads) done." Concerns arose about whether poor voter turnout in the county might determine whether or not the two-eighths increase will pass, placing the county in a difficult financial position when it comes to roads.

However, commissioners were more concerned with whether or not a September deadline would allow time to put the issue to vote. Commissioner Glenn Collier continued to be in support of allowing the issue to go to referendum, despite concerns.

The passage of the amended ordinance is already generating repercussions; commissioners voted to table two resolutions that would have allowed the county to progress with the development of the East Loop Road. "I'm a little disappointed that a lot of people feel like the referendum won't pass and I think we need to have more confidence in the people of Eddy County," Pearson said. If the referendum fails, the county has limited options.

Walterscheid said he had looked into other ways to raise the needed funds, but wanted the public to have an opportunity to be involved in the decision. "The one thing I keep going back to, I still think, is that people need a voice in putting a tax in. This isn't a little tax. It doesn't sound like a whole lot, but it can add up to a lot of change."

Artesia Mayor Phil Burch has been outspoken about his disagreement with the proposed gross receipt tax increases. Burch said, "Three-hundred million over 20 years is not required to run Eddy County. Eddy County is one of the wealthiest counties in the state of New Mexico. Instead of tax increases the focus should be on controlling expenses. Eddy County is not underfunded, Eddy County is overexpensed." The city of Artesia had already passed a two-eighths hold harmless gross tax receipts increase earlier this year.

### Internet – Newspaper Archives Searches RICK J. RUDOMETKIN

(Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **Rick J. Rudometkin** is listed below.]

Carlsbad Current-Argus (NM) April 23, 2015

### Eddy County proposed budget must be cut by \$4.8 million

Author: Katie England

The Eddy County budget will undergo cuts that will be "painful for all involved," a county official said. County Manager **Rick Rudometkin**, Assistant County Manager Kenney Rayroux and Finance Director Roberta Smith prepared a preliminary budget to present to the county commissioners for additional changes Tuesday. The final budget must be approved and sent to Santa Fe by June 1, Rayroux said.

Though the budget had already been slashed significantly from what was requested by county departments, the county still faces about a \$9.8 million deficit for the proposed budget for Fiscal Year 2015-2016. "We took the first cuts and took a \$12 million requested budget down to about a \$9 million dollar hole that we still need to fill," Rayroux told the commissioners on Tuesday. "Either by budget cuts or by pulling out of the general fund balance,"

Rayroux said that right now, he, **Rudometkin** and Smith estimate that the general fund will contain \$22 million at the end of this fiscal year. But, Smith warned that money taken out of reserves won't reappear without some effort, comparing it to taking money from a personal savings account. Smith made a list of the big-ticket items behind the deficit, including a 2.5 percent cost-of-living increase for employees and an increase in new positions and raises for county employees. A three-percent increase in operating costs, capital and non-capital increases and expense exceptions, increases and transfers also contributed.

A projected \$1.5 million decrease in oil and gas revenue also contributed, Smith said, as well as a \$2 million deficit that will carry over from the current fiscal year's budget. Rayroux said there has been a lot of confusion about the \$2 million deficit. For this year's budget, the extra oil and gas revenue is equal to the deficit, but because the same budget carries over into next year, an automatic \$2 million deficit must be accounted for. "If you carry into next year with the same budget, you are going to start with that same \$2 million of extra expense," Rayroux said.

At the end of Tuesday's two-hour-plus budget session, the commissioners came to a consensus, directing Rayroux and Smith to come back to them during a special budget meeting on April 29. The commissioners requested that a budget be prepared that cut \$4.8 million from the current draft of the proposed budget, so that only \$5 million would have to be taken out of reserves. "This will affect all departments," Rayroux said, when commissioner Stella Davis asked whether the road department would be affected by the cuts. "We will work the spreadsheets over to see what it would entail to get us back to that \$5 million. To get us down to that, it's going to be pretty deep. It will be painful for all involved."

### Internet – Newspaper Archives Searches RICK J. RUDOMETKIN

(Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **Rick J. Rudometkin** is listed below.]

Carlsbad Current-Argus (NM) April 11, 2015

### School and city administrator top list of best paid in Carlsbad

Author: Jessica Onsurez

The Carlsbad area paid top dollar for its talented professionals in city and school administration in 2014. The high salaries are designed to make the administrative jobs more attractive to topnotch candidates, officials said.

A database created from records from the city of Carlsbad, Eddy County, Carlsbad Municipal Schools and public parks of the top paid professionals in those departments shows that both the city of Carlsbad and the Carlsbad Municipal School District have some of the highest paid professionals in the region.

In a move meant to make local government jobs in Carlsbad more attractive and competitive, the Carlsbad City Council voted in 2014 to increase compensation for local workers and bring it in line with regional averages. "We became very concerned about retaining our skilled people," McCutcheon said.

At the time, McCutcheon said, a report from a consultant put Carlsbad around 15 percent to 20 percent behind in compensation when compared with other cities in the region. McCutcheon said the change has been beneficial to the city, allowing it to better recruit for vacant positions and retain workers whose years of experience are an asset to the community.

Eddy County Manager **Rick Rudometkin** said that on top of competitive wages, the county keeps its talented professionals by creating a positive and welcoming administrative environment. "We have experience, time put in, knowledge, education and continuing education," **Rudometkin** said. "A servant (of the county) is worthy of their hire. We've got to stay competitive, give them an incentive to stay with us."

**Rudometkin** said that community factors such as recreation, schools and amenities are key to attracting talented and qualified individuals to county government jobs. **Rudometkin** said that since the county made the move to bring salaries to a more competitive level, more resumes are being received for open positions in county government,

**Rudometkin**, who has more than 20 years of experience in government administration positions, tops the list with \$160,000 annually in salary, \$30,000 more than his predecessor, Allen Sartin.

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# Internet – Newspaper Archives Searches RICK J. RUDOMETKIN

(Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **Rick J. Rudometkin** is listed below.]

Carlsbad Current-Argus (NM) January 6, 2015

### New elected Eddy County officials sworn in Tuesday morning

Author: Katie England

Davis, who worked for the Current-Argus for 33 years until late 2013, will replace term-limited commissioner Jack Volpato. Walterscheid will replace term-limited commissioner Tony Hernandez.

Both attended commissioner "boot camp" training in December along with other new commissioners from around the state. County Manager **Rick Rudometkin** also attended.

### Internet – Newspaper Archives Searches RICK J. RUDOMETKIN

(Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **Rick J. Rudometkin** is listed below.]

Carlsbad Current-Argus (NM) November 6, 2014

**Eddy County emergency services director resigns** 

Author: Jessica Onsurez

Eddy County officials will be temporarily spliting up the duties of the county's Emergency Preparedness Manager after the resignation of Joel Arnwine.

According to Hernandez, there is no rush to fill Arnwine's vacated position. Commissioner John Volpato said that Arnwine's duties will be assigned to current county administration staff, a decision which was made Tuesday. "We are splitting management of the county fire and EMS between the county manager and the assistant county manager," said Volpato.

County Manager **Rick Rudometkin** will be heading the fire services department and emergency services will fall under the supervision of Assistant County Manager Kenney Rayroux. "We will see how this (division) works and reevaluate the net fiscal year; then make the decision whether to replace Joel," **Rudometkin** said.

**Rudometkin** and Rayroux will assume the duties on Nov. 10, directly following Arnwine's leave, but both Hernandez and Volpato said they expect the transition to go fairly smoothly. "We are looking forward to see how both departments develop under the new system," **Rudometkin** said.

**Rudometkin** said that both departments should continue to function normally and there are no disruptions to services to the county expected.

According to **Rudometkin**, both he and Rayroux will not be receiving additional pay to take on the additional duties, however, that decision may change based standard employee evaluations.

Volpato said that Arnwine is working with the county on the transition and has said he will remain available to the county during that time. Arnwine could not be reached for comment.

### Internet – Newspaper Archives Searches RICK J. RUDOMETKIN

(Articles are in reverse chronological order)

Carlsbad Current-Argus (NM) September 10, 2014

### Eddy County and Carlsbad City officials head to D.C.

Author: Zack Ponce

Several Eddy County and Carlsbad officials will travel to Washington D.C. next week to ensure the Waste Isolation Pilot Plant receives emergency funding to pay for underground recovery efforts after a radiation leak. Eddy County Commissioners Susan Crockett, Jack Volpato and Tony Hernandez, along with County Manager **Rick Rudometkin** and Carlsbad City Councilor Janell Whitlock will meet with top government officials and politicians from Sept. 16 to 18 about finalizing appropriations for the nuclear waste disposal facility. Carlsbad Mayor Dale Janway and Carlsbad Mayor's Nuclear Task Force Chairman John Heaton will also separately travel to D.C. from Sept. 15 to 18. Hernandez said the lobbying trip is "crucial" because Congress does not have much more time to allocate emergency funding to WIPP.

A chemical reaction caused an explosion inside a waste drum stored in underground salt deposits at WIPP on Feb. 5. Shortly after, trace amounts of americium and plutonium were discovered in the outside air about a half mile from the site located 26 miles southeast of Carlsbad. Both the House and Senate appropriations committees passed funding bills in June to grant WIPP money for cleanup expenses in addition to its \$220 million operating budget already approved by President Barack Obama for Fiscal Year 2015. However, Congress has not yet passed a reconciled bill that would allow WIPP to receive the funding, and that worries many leaders in Eddy County. "It's very important for us to get this work done while we're in Washington because of the short timeframe," Hernandez said.

Congress has until Sept. 19 to pass an appropriations bill to fund government agencies before the legislative body will break until after the November elections. If one is not passed, those agencies including the U.S. Department of Energy can only gain access to money via continuing resolutions. According to Volpato, the problem with that route is WIPP cannot access additional money for recovery. "The money is in there (appropriations bills) but if we go into a Continuing Resolution, we won't get that money," Volpato said. "We need an additional \$130 million and we're going to be having those conversations to make sure that happens."

The Senate Appropriations Committee authorized the DOE to receive an extra \$102 million for recovery efforts. The House appropriations committee authorized the DOE to receive up to \$120 million, contingent upon any excess money that the government had saved up from anticipated overpayments of employee's pensions.

The Eddy County and city contingent will meet with Sen. Barbara Mikulski (D-Maryland), Sen. Richard Shelby (R-Alabama), Rep. Harold Rogers (R-Kentucky), and URS Corporation officials in addition to New Mexico's congressional delegation. Mikulski chairs the Senate Appropriations Committee while Shelby and Rogers are members of the appropriations committee in the Senate and House respectively.

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### Internet – Newspaper Archives Searches RICK J. RUDOMETKIN

(Articles are in reverse chronological order)

Carlsbad Current-Argus (NM) August 6, 2014

### County Commission leans toward not providing security at FLETC

Author: Jonathan Smith

The message from Eddy County officials is clear: it will not get into the security business. The Eddy County Commission sent that direction to county staff Tuesday while members discussed a proposal to contract security services for the detention center for undocumented immigrants at Artesia's Federal Law Enforcement Training Center. U.S. Immigration and Customs Enforcement had asked the county to provide security for the center.

County Manager **Rick Rudometkin** said it would not have cost the county any money. The county would have been reimbursed by the federal government.

A previous discussion was tabled during a meeting in July to give the county enough time to gather more information from ICE. However, elected county officials still had concerns over the process during Tuesday's commission meeting. "I just don't get any warm feeling with intrenching us with this," Eddy County Sheriff Scott London said. "I really don't feel that it is our job to provide security."

London and **Rudometkin** said a contract like that could have strained county law-enforcement services because the county could lose employees to the project. London stressed to the Commission that departments like the Eddy County Detention Center are still understaffed because of recruitment issues and a potential security contractor would most likely have to find future employees from Carlsbad and Artesia.

ICE had asked that a third-party company contract 88 officers for the center, **Rudometkin** said.

County Commissioners shared similar beliefs and agreed that it should be ICE's responsibility to contract the security service without getting the county involved. "I'm not in favor of it for multiple reasons," Commissioner Susan Crockett said. "It's not something we should get involved with." "The lack of support from ICE terribly disturbs me," Commission Chairman Tony Hernandez said.

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### Internet – Newspaper Archives Searches RICK J. RUDOMETKIN

(Articles are in reverse chronological order)

Associated Press State Wire: New Mexico (NM)

July 8, 2014

### Immigration security help vowed for New Mexico

Author: Unknown

Federal authorities are promising a southeastern New Mexico county that immigration officials will pay for any additional security connected to a temporary detention center.

The Carlsbad Current-Argus reports (http://goo.gl/ELEbeu) that Eddy County **Manager Rick Rudometkin** (ROO'-doh-MEHT'-kin) said last week U.S. Immigration and Customs Enforcement asked the county to provide backup security.

But **Rudometkin** says the county will have to go through a contractor to hire close 90 security personnel. He says ICE will foot the bill.

Federal officials are using Artesia's Federal Law Enforcement Training Center as a detention center for 700 Central American women and children. The three barracks at the Artesia site will hold people as they await deportation or seek asylum amid an influx of women and children fleeing gang violence and poverty in Central America.

# Internet – Newspaper Archives Searches RICK J. RUDOMETKIN

(Articles are in reverse chronological order)

Region: Carlsbad NM UPI NewsTrack

February 27, 2014

### 13 WIPP workers test positive for radiation, DOE says

**UPI News Service** 

Thirteen employees at the Waste Isolation Pilot Plant near Carlsbad, N.M., have tested positive for radiation after a leak at the plant, officials said. More people will be tested for radiation during the ongoing investigation into how the Feb. 14 leak at the plant happened, KRQE-TV, Albuquerque, reported.

The Department of Energy said 13 people who were working above ground the day of the leak have tested positive for radiation. It is too soon to tell how the radiation will affect the workers' health, but people they come in contact with are not at risk, the DOE said.

In a letter sent out Wednesday to the residents of Eddy and Lea counties, the DOE said radiation got into the air at very low levels, posing no more risk than a chest X-ray. An underground facility that stores contaminated waste from Los Alamos and other nuclear sites has been closed since the incident. Residents said they are concerned about the leak.

I don't think the people really know what's going on at WIPP, said Carlsbad resident, Robert Ortiz. WIPP has always been secretive.

However, Eddy County Manager **Rick Rudometkin** said he believes the DOE is handling the situation well. Whenever you have a disaster of any kind, there are always issues. You always mitigate the disaster and you move forward, **Rudometkin** said.

## Internet – Newspaper Archives Searches RICK J. RUDOMETKIN

(Articles are in reverse chronological order)

Carlsbad Current-Argus (NM) November 6, 2013

#### Eddy County Commission OKs \$120K contract for new manager

Author: Jonathan Smith

Eddy County Commission officially approved the hiring of new County Manager **Rick Rudometkin** after the commission finalized the contract during the commission meeting Tuesday morning.

**Rudometkin**, former public works director for the county, was announced as the replacement candidate for current County Manager Allen Sarkin during a commission meeting Oct. 15. He will be paid \$120,000 a year, according to the contract.

The salary will be reviewed after a full year, and he'll be entitled to the same cost-of-living increases provided to other members of Eddy County's management staff. The contract also calls for use of a county vehicle.

Sartin, the current acting manager, earned around \$130,000 last year in salary, according the Rio Grande Foundation website. Lea County's manager netted \$151,000 according to the website. The county manager in Chaves County, meanwhile, earns \$123,000 annually.

**Rudometkin's** contract does not list a figure amount for benefits, but it did indicate he should receive the same benefits provided to all other county employees. He will also be entitled to 160 hours of paid vacation leave per year. He is eligible for 80 vacation hours immediately.

**Rudometkin**, who was hired in April for the public works position, beat out a field of 30 candidates for manager position. **Rudometkin** made the transition to the position in October. He will continue to work with Sartin until he retires on Dec. 20.

# Internet – Newspaper Archives Searches RICK J. RUDOMETKIN

(Articles are in reverse chronological order)

Carlsbad Current-Argus (NM) October 15, 2013

### Public works director Rick Rudometkin gets Eddy County manager job

Author: Stella Davis

Eddy County Public Works Director **Rick Rudometkin** has been named the New Eddy County manager. County Commission Chairman Jack Volpato said the commission believes **Rudometkin** comes well-qualified for the job and the commission's choice is a good one. The county initiated the search for a new county manager in July after current manager Allen Sartin announced he planned to retire Dec. 20.

Starting next week, **Rudometkin** will transition into the county manager's office and work with Sartin until he leaves. **Rudometkin** was hired in April for the public works position and was chosen for the county manager's job from a field of 30 candidates. "I'm extremely happy and very humbled that the commission chose me. I think I can help move our county into the future," **Rudometkin** said after the commission announced its choice.

Rudometkin comes to the jobs years of administrative experience. Prior to accepting the job in Eddy County, he served as the streets division manager for the city of Colorado Springs and managed a \$22 million budget from 2011 to February of this year. From 2007 though May of 2011, Rudometkin worked for Modoc County in Alturas, Calif., where he served as director of transportation and public works director and later, county administrative office and director of administrative services. He also has worked as public works manager for the city of Dana Point, Calif., as well as for a private company as a public works inspector. Rudometikin holds a Bachelors of Science in Business Management degree from Woodbury University in Burbank, Calif.

# Internet – Newspaper Archives Searches RICK J. RUDOMETKIN

(Articles are in reverse chronological order)

Colorado Springs Independent June 5, 2013

### City's severance deals require ex-workers to keep quiet Hush and be paid

Author: Pam Zubeck

Editor's note: After deadline Tuesday, the city released two more severance agreements, bringing the total to 31. This story has been updated to reflect that change.

Most of the 31 Colorado Springs employees given severance pay to leave the city since Mayor Steve Bach took office in June 2011 agreed to keep their mouths shut about those severance agreements, and about city business as well. In some cases, employees faced paying the city "damages" if they didn't hold up their end of the deal. For example, land development review division manager Dick Anderwald received \$36,777 in severance pay but risked losing half of it if he blabbed.

While the agreements vary, one "non-disparagement" clause reads: "Employee shall not make negative comments relating to the City, its employees or representatives, its services, or the circumstances surrounding Employee's departure from the City's employment. The City shall not make negative comments relating to Employee's employment with the City."

It's one of the revelations that comes after the city reversed its decision to keep the severance agreements secret. The Independent had sought the agreements in February and again in April. In May, it engaged attorney Bill Louis, who pursued them on the Indy's behalf. The city failed to respond within the time allowed by law and then sought an extension.

The Indy threatened in a May 28 letter to file a lawsuit if the agreements weren't released by Friday, May 31. Late that day, the city said it would release the records, without explaining why it was reversing course. It followed through around midday Monday.

Of the 31 agreements, only one acknowledges a previous employment contract that required severance pay. Former City Attorney Patricia Kelly was entitled to six months' pay under her 2000 contract, which in 2011 amounted to \$96,164.

Ten of the dismissals were due to "reduction in force," while others resulted from retirements, resignations or a desire by the employee and city to "resolve claims" that were pending (but otherwise not described). One such resignation agreement involved 31-year employee Steve Cox, who left last summer after serving as fire chief, interim city manager and in two high-level positions for Bach.

The total tab for severance doled out between July 2011 and May 2013 comes to more than \$950,000. That doesn't include other concessions the city made, such as paying for health coverage, paying for unused sick time, and forgoing collection of \$2,100 paid in education

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# Internet – Newspaper Archives Searches RICK J. RUDOMETKIN

(Articles are in reverse chronological order)

assistance to firefighter Scott Bond, who was with the city only 15 months and also collected \$9,918 in severance pay.

In fact, four employees who spent less than a year with the city received substantial severance packages. One for streets division manager **Rick Rudometkin** totaled nearly \$28,000; another for deputy city attorney Robert Frankel, nearly \$21,000. But shorttimers weren't the rule. Those ousted represent a cumulative total of more than 300 years of service to the city.

All that leaves Councilor Jan Martin wondering about the mayor's severance program. "It's not uncommon for the private sector to require confidentiality agreements as well as non-disparagement agreements, but as I mentioned before, city government is not the private sector and should be much more open when employees are let go with severance packages," she writes via e-mail. She adds that she's "uncomfortable" that ex-employees are prohibited from discussing their agreements and other city matters.

That's probably because it's not good policy, says Luis Toro, director of the nonprofit Colorado Ethics Watch. "The people of Colorado Springs would be better off knowing what might be going wrong inside their city government," Toro says in an e-mail, "instead of having their tax dollars used to buy the silence of potential critics."

## Internet – Newspaper Archives Searches RICK J. RUDOMETKIN

(Articles are in reverse chronological order)

Gazette, The: Blogs (Colorado Springs, CO)

January 5, 2012

#### City announces new Streets Division manager

Author: Daniel Chacon

Colorado Springs has a new Streets Division manager. The city announced today that **Rick J. Rudometkin**, whose effective start date was Tuesday, was selected after a national search and competitive process. **Rudometkin** will be paid \$110,819 a year, city spokeswoman Mary Scott said.

**Rudometkin** worked for the last four years as director of transportation/public works for the County of Modoc in California. He recently served as that city's chief administrative officer, the city said in a press release.

**Rudometkin** has a bachelors of science degree in business management from Woodbury University and has worked in both the public and private sector, the city said.

He has also worked as public works manager for the city of Dana Point and utility/project manager for the engineering firm Willdan.

# Internet – Newspaper Archives Searches RICK J. RUDOMETKIN

(Articles are in reverse chronological order)

Herald and News (Klamath Falls, OR) November 11, 2009

### Modoc OKs crisis team Supervisors reject state of emergency declaration

Author: Lee Juillerat

Modoc County supervisors Tuesday voted not to seek an emergency declaration because of the county's financial crisis, but agreed to use a newly established incident management team to help try to avert a worsening situation.

During an often tumultuous meeting, supervisors named **Rick Rudometkin**, the county's director of transportation/public works director, interim county administrative officer. He will work with departing CAO Mark Charlton, who last week announced his resignation effective Dec. 4.

Supervisors also announced their intention to seek legal action against the firm that did the county's 2007-08 audit, which was rejected by the state of California. They will hire a new firm to redo the 2007-08 audit, complete an audit for 2008-09 and audit the Modoc Medical Center.

County leaders will meet Friday with representatives from Plumas Bank, which has a bank in Alturas, about negotiating a short-term loan for \$3 million to \$4 million. Charlt on last week told supervisors the county needs a loan to cover expenses through June. He said the county may be unable to meet payroll and other expenses by February or March.

The crisis stems from long-standing financial problems at the county owned Modoc Medical Center, which, despite repaying more than \$2 million in the past year, has a remaining debt of about \$12.5 million. It was learned earlier this year that money from various earmarked accounts was transferred to the hospital.

In a meeting marked by confusion, with supervisors verbally sparring among themselves and with county department heads, the board unanimously appointed **Rudometkin** without discussing his qualifications. The action came before the supervisors heard a report from the incident management team formed last Friday to investigate and recommend possible solutions to the county's financial crisis. Several team members, including department heads and others who voluntarily worked through the weekend, were clearly upset.

Undersheriff Gary Palmer, who issued the county's emergency declaration last week and was proposed to head the management team, helped cool the tensions by pledging to work with **Rudometkin**. "I don't care who's in charge. This system works," Palmer said, referring to the incident management team process. "All he has to do is ask."

Palmer's comments came after supervisors unanimously agreed to reject his call for a state of emergency based on the financial crisis. Under state law, a county's governing board has the final decision on seeking an emergency status. County District Attorney Gary Woolverton issued a

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# Internet – Newspaper Archives Searches RICK J. RUDOMETKIN

(Articles are in reverse chronological order)

legal opinion saying he does not believe a financial crisis qualifies as an emergency. Richard Arrow, a retired auditor hired by Modoc County to assist with financial advice, said he believes steps taken Tuesday serve as good first steps in solving problems. "I wouldn't say I'm optimistic, but I'm positive," Arrow said, noting the three audits will start after Thanksgiving. "In order for this to be successful, there has to be a unified front."

#### g.

# Internet – Newspaper Archives Searches RICK J. RUDOMETKIN

(Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **Rick J. Rudometkin** is listed below.]

http://www.danapoint.org/home/showdocument?id=2374 June 8, 2005

# CITY OF DANA POINT, CALIFORNIA CITY COUNCIL REGULAR MEETING MINUTES

3. Recognition of Employees Who Assisted in Storm Related Disasters Mayor Rayfield presented Certificates of Recognition to the following individuals who assisted in recent storm related disasters in the City of Dana Point:

City of Dana Point Rick Rudometkin

Research Compiled by: Amanda Dillabough & Shannon Farr

Colin Baenziger & Associates



Stacey L. Kifolo

# Belle Isle City Manager Candidate Report

## **Section 5**

## **TABLE OF CONTENTS**

|                         | PAGE |
|-------------------------|------|
| COVER LETTER AND RESUME | 1    |
| CANDIDATE INTRODUCTION  | 7    |
| BACKGROUND CHECKS       | 15   |
| CB&A REFERENCE NOTES    | 21   |
| INTERNET SEARCH         | 35   |

## Cover Letter and Resume

## STACEY L. KIFOLO

Winter Park, Florida 32792 | 570-768-7586 | staceykifolo@gmail.com | linkedin.com/in/stacey-kifolo

April 17, 2023

Colin Baenziger & Associates 2055 South Atlantic Avenue, Suite 504 Daytona Beach Shores, FL 32118

Dear Mr. Baenziger and Ms. Klein:

Please allow this letter and attached resume to serve as my request to be considered a candidate for City Manager for the City of Belle Isle, Florida. As you are aware I expressed interest directly to the City after the vacancy announcement in March. Following that submission, the Council decided to employ your services to aid in finding the best candidates. After reading the recruitment brochure, I believe that I possess the personal characteristics desired, and I am confident that my education and experiences, including Florida municipal government, will enable me to proactively address the community's current and future challenges and opportunities as the next long-term City Manager.

Many of the City's needs are reminiscent of those I successfully managed for a 7k+ population community in Central Pennsylvania. My first major project was the construction of a new municipal building and public works facilities. As the municipality's first manager, I had a very lean staff. Providing services, improving infrastructure, and attracting grant funds required building strong relationships and developing effective intergovernmental cooperation, which included partnering with surrounding municipal leaders, county government departments, state representatives, and community members.

My career has centered on improving communities and providing opportunities that encourage and enable staff to continually strive for personal growth, which positively impacts service delivery and organizational effectiveness. I have played key roles in influencing public policy, spearheading innovative programs, strengthening infrastructure, enhancing parks and recreation, streamlining operations, improving communications, and increasing transparency. By leveraging my financial and business acumen, I have significantly improved capital reserves and operating fund balances, limited benefits cost increases, and consistently maintained, even lowering, tax rates without compromising services or projects.

The following are a few highlights of my accomplishments:

- Successfully managed numerous federal and state grants, including a major publicprivate partnership that transformed 42 acres of brownfield into a job-creating commercial zone.
- Established an investment account that will meet future needs for a previously unfunded \$3.3M pension benefits liability.
- Secured grants from the Departments of Transportation, Environmental Protection, and Conservation and Natural Resources.
- Excelled as project manager and owner representative of a \$3.5M municipal building and public works facility construction project; delivering the project with <1% cost overruns.

I believe my vision and values align with the description provided by the Council and that I would be an excellent fit for the City of Belle Isle. I am available by phone or email and look forward to discussing this opportunity with you. Thank you for your consideration.

Sincerely, Stacey L. Kifolo

## STACEY L. KIFOLO

Winter Park, Florida 32792 | 570-768-7586 | staceykifolo@gmail.com | linkedin.com/in/stacey-kifolo

#### PROFESSIONAL EXPERIENCE

#### **DEPUTY CITY MANAGER**, 8/2021 to 12/2022

City of Deltona, Florida

- Directed operations of 6 departments including Finance, Procurement, and Contracting; Asset Management; Human Resources and Risk Management; Information Technology; Communications & Marketing; Records Management; and an Event Center providing entertainment and food & beverage.
- Advised 5 departments including Parks & Recreation; Public Works and Utilities; Planning and Zoning;
   Building and Code Compliance; and Fire Department.
- Supervised staff of 375 direct and indirect reports.
- Guided development and executed a \$210M annual budget.
- Reinforced top-level decisions and strategy planning; and served as a critical advocate for change management.
- Appointed and coached department heads to expand cross-functional organizational capacity by collaborating on priorities, functions, and common goals.
- · Managed employee benefits programs to maintain a strong portfolio while reducing associated costs.
- · Researched issues, authored reports, and presented findings to city staff and the public.
- Executed existing Collective Bargaining Agreement (CBA) terms, and led negotiations for renewal.

#### TOWNSHIP MANAGER / CAO, 11/2012 to 8/2021

East Buffalo Township, Pennsylvania

- Fully remote from 2018-2021.
- Steered day-to-day operations of local government including finance, public works, planning & zoning, and human resources.
- Developed budgets, controlled costs, and optimized spending resulting in annual surpluses of up to \$500K.
- Grew operating fund balance by 150%, capital reserves by 850%, and maintained an even tax rate for four
  years followed by a 12% reduction.
- Achieved a 75% increase in OPEB assets while simultaneously reducing unfunded accrued liability by 35%.
- Contained benefits costs and sustained an average increase of 0.5% for 7 years through negotiations.
- Directed strategic planning, policy development, audit compliance, and vendor contracts.
- Strategized asset and master planning for capital construction, equipment, and road and bridge infrastructure.
- Organized bid processes from proposal parameters through contracting and project delivery.
- Cultivated relationships with local / state representatives, utility companies, and public safety agencies.
- · Secured \$1.75M in state grants for infrastructure, natural resources restoration, and park rehabilitation.
- Created public communications strategies, including website, social media, and direct mail.
- Excelled as project manager and owner representative, delivering projects on time and under budget.
- Coordinated construction and administered \$4.4M of state and federal grants to transform a 42-acre brownfield site into a job-creating commercial zone under a public-private partnership.

Page 1 of 2

#### FISCAL / PROJECT MANAGER, 7/2008 to 10/2012

Central Pennsylvania Workforce Development Corporation, Pennsylvania

- Partnered with employers, educators, and contractors to address workforce needs in a 9-county region.
- Managed vendor and partner contracts and completed related receivables and payables.
- Negotiated 7 facility leases and renovations as owner representative.
- Delivered financial and program performance presentations to executives, board, and project teams.
- Played a key role in the procurement and implementation of a \$3M Department of Labor Technical Skills Training grant.
- Created awareness of program opportunities by creating engaging marketing materials.
- Drove results by establishing standards for four industry-specific adult education and training programs.

#### EDUCATION

#### Master of Business Administration (MBA)

Louisiana State University - Shreveport, LA

#### **Bachelor of Science, Business Administration**

Bloomsburg University of Pennsylvania - Bloomsburg, PA

#### CERTIFICATES

#### **Crummer Certification in Business Management**

Rollins College - Winter Park, FL

#### Florida Real Estate Sales Associate Pre-License Certificate

Azure Tide All Florida School of Real Estate - Bradenton, FL

#### ADDITIONAL EXPERIENCE

Leadership Susquehanna Valley Board Member – 2 Years

Union County, PA, Emergency Management Operations Center Team Member – 5 Years

Buffalo Valley Regional Police Commissioner – 2 Years

Union County, PA, Greenway & Open Space Plan Steering Committee Member - 1 Year

Candidate Introduction

#### **EDUCATION**

Master of Business Administration, Louisiana State University, Shreveport, LA Crummer Certification in Business Management, Rollins College, Winter Park, FL Bachelor of Science, Bloomsburg University of Pennsylvania, Bloomsburg, PA

#### **EXPERIENCE**

| Deputy City Manager, City of Deltona, FL                        | 2021 - 2022 |
|---|-------------|
| Township Manager / CAO, East Buffalo Township, PA               | 2012 - 2021 |
| Fiscal / Project Manager, Central PA Workforce Development Corp | 2008 - 2012 |
| Business Operations Director, PA Treatment & Healing            | 1999 - 2008 |
| Credit Analyst, Advanta National Bank                           | 1998 - 1999 |
| Sales Consultant, Saturn of Harrisburg                          | 1993 - 1998 |
| Guest Services, Best Western Hotel                              | 1992 - 1993 |
| Customer Service, Family-Owned Restaurant                       | 1990 - 1993 |

### **BACKGROUND**

The City of Deltona, Florida spans 40+ square miles in southwestern Volusia County and is part of the St. Johns River Water Management District. Originally established as a planned residential community, the Deltona fire district was dissolved when the city was incorporated on the last day of 1995. The city remains primarily residential, with a culturally diverse population of 93,600+, and serves as a commuter town for nearby cities. Interstate 4 traverses near the western boundary, near the city's zoned industrial area, which includes an Amazon distribution center. The Daytona State College is expanding its regional campus in the city to provide nursing degrees, in-demand career certificates, and adult education classes to meet local demand.

In 2022, the City of Deltona General Fund budget was \$168M; Proprietary Funds, which include city-owned water and wastewater utilities, were \$60.5M; for a total budget of \$228.5M. The city had 375 employment positions, with twelve departments, six of which reported directly to me as the Deputy City Manager. The fire department, which includes, emergency management, is a city department, whereas the Volusia Sheriff's Office is contracted for law enforcement services.

The three most significant issues facing the City of Deltona are:

• Septic Systems. Attracting businesses to Deltona would alter the tax base and create jobs, however, an impediment to commercial growth is the lack of sanitary sewer, even within applicably zoned areas. In addition, despite the city having adequately sized

- wastewater treatment facilities, only a quarter of residential dwellings are connected. Septic system environmental impacts and residential sprawl are significant issues.
- Parks and Facilities. The city has an inventory of 23 parks, ranging in size and with varying amenities, from a skate park to a dog park, and nature parks to a sports complex. In addition to city hall, municipal buildings within parks have suffered years of neglectful routine maintenance and a failure to gradually upgrade parks and facilities to meet ADA requirements. This will require a significant investment by the City to make necessary repairs and upgrades for health and safety purposes.
- Increasing Pension Liability. The unfunded liability in the City's fire pension had grown from under \$400k to over \$8M in approximately 12 years. The actuarial released in 2023 reports a \$13M unfunded liability. In the best interests of the firefighters and the taxpayers, the city with the local IAFF needs to improve the fund's long-term health. This will likely require a significant increase in annual contributions, which could negatively impact future tax rates and/or other city programs, services, or facilities.

#### GENERAL, MANAGEMENT STYLE AND EXPERIENCE

The City of Belle Isle has similar demographic characteristics to my previous municipality, which happened to be in the town where I was born and raised in Central Pennsylvania. Although Belle Isle is smaller in land area and has a higher population density, my municipality in Pennsylvania had a population of 7K+. It is a college town rich with a diversity of people, cultures, food, and activities. It has a small-town feel and charm but Philadelphia, Pittsburgh, Baltimore, and New York City are within driving range. I enjoy the diverse aspects of operating a local government, the need to be adaptable, the bringing together of people to foster creative solutions, and the service to a community. I believe that I have the mindset and transferable skills to make a positive difference with a strong focus on the future.

I am an adaptive leader, who understands that individual situations and/or people require different management styles to be effective. I believe that each of us is a teacher and each of us is a student, which has positively impacted my ability to be a strong municipal manager. With the wide-ranging challenges that I may face on any given day, I realize that I cannot be an expert on every subject, but I do have the ability to reach out to knowledgeable people and collaborate with them to find solutions. Experience has shown me that building relationships within the community and with neighboring municipalities, county, and state representatives expands a municipality's access to talent and resources. I am a strategic thinker and an active listener. Decisions are made after analysis and getting necessary inputs and evaluation, always keeping the best interests of residents and guests in focus. I do not shy away from decision-making. I explain my reasoning and thought processes as a means of improving understanding, fostering teamwork, and gaining support.

My staff would say that I have an open-door policy because communication is important for a productive and rewarding work environment. They appreciate that I am available, approachable,

honest, knowledgeable, and ready to go to bat for what is right. They would tell you that I ask questions, not to find fault, but to find understanding. Sometimes the questioning is for me to find a better understanding, and sometimes it is about getting us to think about a situation from other angles. Everyone is encouraged to grow. One of the sayings I dread hearing is: "This is the way we have always done it." If it works, keep it. If there is a better way, that's what we will do. My staff knows that I won't make a change just to make it different, and I won't make a change that adds unnecessary work, but I will ask everyone to strive for continuous improvement.

The elected officials I have served would likely say that I am knowledgeable, highly competent, ethical, dedicated, transparent, strategic, and practical. I understand laws and regulations and I am capable of drafting policies and reviewing contracts. My communications are clear and concise. As one elected official once told me, I have a way of simplifying anything so that she understood, but I never made her feel inferior. I present elected officials with the information needed to make informed decisions, even if the information runs counter to what is most desired. I am an excellent negotiator with a commitment to managing costs, eliminating waste, and establishing strong internal controls. I have made significant contributions with my abilities to secure grants and manage grant-funded projects.

My greatest strength is my desire to have a positive impact on others. I am a strategic thinker, an analytical and creative problem solver, goal-oriented, proactive, and pragmatic. I realize effective communication requires strong written and verbal skills but understand that neither can be possible without empathetic listening first. I excel at cultivating relationships with key stakeholders and bringing together the right people to resolve issues and reach goals. I learn quickly, adapt to fast-paced work environments, easily grasp complex concepts, and implement sound work plans either independently or as part of a team.

In terms of weaknesses, I am a perfectionist. I must recognize when that trait is an asset and when it is a weakness. At times, I procrastinate with mundane tasks, but I never miss a deadline or hesitate in making timely decisions. Sometimes I struggle to delegate tasks, but with my previous remote work and management of a larger staff, I feel that I have improved in this area, but must remain diligent in not falling back to old ways.

Performance metrics vary depending on the project or task. Some are hard and fast, such as ontime completion, and budget management. Other metrics would include attendance, team participation, and providing friendly customer service. Progress made in reaching the strategic goals outlined by the governing body is an ongoing performance measure, keeping in mind that sometimes unanticipated matters may temporarily delay progress.

I am most proud of facing a \$3.3M unfunded post-retirement health care cost liability and putting East Buffalo Township in a solid financial position to prevent it from needing to increase taxes or diverting funds from needed projects because of this burden. I spearheaded efforts to reduce current costs, which as of the end of the 2021 fiscal year, lowered the total liability to just over \$2M. In 2013, after having our actuary perform the analysis, I established a

subaccount in the capital reserve fund to lay the groundwork for investing. By 2016, I had earmarked \$400,000. Coupled with a \$500,000 low-interest 5-year loan, we invested \$900,000. The loan was repaid in 2019 and, as of the end of the fiscal year 2021, the investment account balance exceeded \$1.8M.

Just before my employment with the Township, plans and agreements had been approved for a public-private partnership to transform a 42-acre brownfield site into a job-creating commercial zone. A clause in the primary agreement between the municipality and the developer provided for full project completion before the issuance of occupancy permits. Without advance notice to me, the Planning Director issued a certificate of occupancy for one unit before the completion of off-site transportation improvements. When I questioned the issuance, I found that the Director had been working off of an unsigned agreement draft, which was not consistent with the final contract that contained the completion clause. Ultimately, the mistake was mine because I had assumed too much. Given the Director's involvement in the project from the beginning, I assumed when I should have verified, that we were working off the same agreement. I took responsibility for the error with the elected officials and the developer, retaining a strong relationship with the developer and averting potential issues in bringing the project to a close under the terms of the original agreement. It was a communication lesson and an example that reinforced that ensuring that everyone is on the same page does not signal distrust in the abilities of others, but rather builds a stronger bond in getting everyone moving toward the same goal.

I have been in situations that required employee terminations, the circumstances of each warranted different responses and personal reactions. I fired an employee for gross negligence that put others in danger. That was handled swiftly and directly, and I have no regrets because the safety of my staff members comes first. Another example was an employee who did not respond favorably to positive coaching. I wanted to give her a chance, which is why I was coaching her, but that led to progressive discipline, which ultimately resulted in the termination of her employment.

The challenges I would expect to face with the City of Belle Isle are:

- Building trust with elected officials, all staff members, and the public.
- Exploring opportunities for expanding the City's footprint.
- Planning and construction of City facilities to meet current and future needs.
- Addressing traffic concerns on the City's two primary collector roads.
- Supporting innovative policing strategies to proactively address community needs.
- Improving interlocal agreements and ensuring that the City's best interests are addressed.
- Reviewing internal processes and staffing to ensure efficiencies and effectiveness.

During the first six months, my efforts will involve:

- I will further familiarize myself with the City's codes, and the comprehensive plan, and gain an understanding of the details for ongoing and future projects and initiatives.
- Relationship building. Although the City has maintained good relationships with key

stakeholders, my relationship-building would be a high priority. This will involve meeting with staff, council members, citizens, community groups, charter school personnel, officials of neighboring cities, Orange County representatives, state officials, MCO, and the Lake Conway Water and Navigation Control District. Gaining insight from these differing perspectives will aid in my assessment of the City's strengths, challenges, and opportunities.

- Understanding the Council's goals and perspectives to evaluate current and/or formulate actionable strategic planning.
- Assessing the City's financial position, reviewing past and anticipated future trends, exploring options for grant funding, and presenting the Council with recommendations.
- Understanding current performance measures and initiating revisions and clarifications as necessary to meet the current and future needs of the community and the Council.

In my role with the Township, I established and maintained strong relationships with local media. Local reporters had come to know that I am transparent, reliable, and a timely source of accurate information. My goal is to always provide the media with information that will keep citizens apprised of operations and programs. News outlets reported in October 2022 that I had been suspended with pay from the City of Deltona. The report, from a newly installed interim city manager, provided no details. Following the appointment of a second interim manager, he reported that I had not been suspended and that there was no disciplinary action of any kind against me. This report, however, did not make its way to any news outlet.

While serving the Township, I implemented a text messaging service that processed the mass distribution of information to subscribers and gave residents the ability to easily report concerns. Deltona had a dedicated staff which allowed for greater use of numerous social media platforms. With the City, I developed a media strategy guide to improve the effectiveness of the messaging and would work with staff to develop similar principles that would be effective in Belle Isle. The goal is to maintain consistency, educate the public, and provide timely news, while not oversaturating social media channels and remembering that not every resident uses social media.

I do not anticipate any community activists contacting the City with negative comments about me. I had a very positive reputation when serving as the township manager in East Buffalo, but given the political whirlwind in the City of Deltona is a political whirlwind so I cannot guarantee that someone won't make false claims. Should any negative remarks surface, I respectfully request an opportunity to present my perspective.

In my spare time, I enjoy reading, traveling, family time, physical fitness activities, and home improvement projects.

### SIX ADJECTIVES OR PHRASES I WOULD USE TO DESCRIBE MYSELF

- Analytical
- Approachable
- Dedicated
- Highly ethical
- Knowledgeable
- Proactive

#### **REASON FOR DEPARTING MOST RECENT POSITION**

The Deltona city manager, who hired me in August 2021, voluntarily resigned in September 2022. In mid-October, the commission installed a new city manager, who began removing staff from key positions, starting with me. I was given the option to resign or he would terminate my at-will employment. I resigned to retain personal credibility and protect the positive reputation I have carried throughout my career.

#### MOST RECENT SALARY

My base salary at Deltona was \$155,397. Total compensation with benefits was \$250,000.

## **Section 5**

CB&A Background Checks

## **Section 5**

### Background Check Summary for STACEY LYNN KIFOLO

#### **Criminal Records Checks:**

Nationwide Criminal Records Search No Records Found

County

Orange County, FL
Volusia County, FL
Union County, PA
Wayne County, PA
No Records Found
No Records Found
No Records Found
No Records Found

State

Florida No Records Found Pennsylvania No Records Found

#### **Civil Records Checks:**

County

Orange County, FL
Volusia County, FL
Union County, PA
Wayne County, PA
No Records Found
No Records Found
No Records Found

Federal

Florida No Records Found Pennsylvania No Records Found

**Motor Vehicle** 

Florida No Records Found

**Credit** Excellent

Personal Bankruptcy No Records Found

Sex Offender Registry

Not Listed

**Education** Confirmed

**Employment** Confirmed, except for PA Treatment

and Healing (1999 - 2008)

Social Media Nothing of Concern Found

Page 16 of 101

## **Section 5**

### **Background Check Summary for STACEY LYNN KIFOLO**

Under the Fair Credit Reporting Act, 15 U.S.C. 1681-1681Y, credit and bankruptcy information are very sensitive and should not be used be in the consideration of hiring. The information is included for each candidate because we do not want you to be surprised if third parties raise what they consider to be a concern. Also, some states have limited the reporting to seven years, so any records older than that will not be available in those states. In addition, motor vehicle reports are limited to three to seven years, depending on the state.

## **Section 5**

# **Background Check Summary for STACEY LYNN KIFOLO**

#### **Personal Disclosure**

| Personal Disclosure Questionnaire   |               |   |                                     |                             |   |  |  |
|---|---------------|---|-------------------------------------|-----------------------------|---|--|--|
| Name  | of Applicant: | Stacey Lynn                                   | Kifolo                              |                             |   |  |  |
| The following questions are designed so that we will be able to make full disclosure to our client concerning you background. Please answer them honestly. Cutting corners or misrepresenting your past will result in you being eliminated from all further searches conducted by this firm. We understand that frivolous charges are sometimes made and that charges do not mean you were guilty. We also understand that you may have been wronged and needed to see compensation. The bottom line is that we want to be certain that our client is fully informed. If you have an questions, please contact us for clarification. |               |   |                                     |                             |   |  |  |
|   | explain any v |   |                                     |                             | 3000 (1000 100 100 100 100 100 100 100 10   |  |  |
| 1.  | Have you eve  | er been charge                                |                                     |                             | a felony?   |  |  |
| 2   |               |   |                                     | , ,                         | involved in a domestic violence or abuse incident?  |  |  |
| 2.  | -             |   |                                     |                             | involved in a domestic violence of abuse incident.  |  |  |
| 3   |               |   |                                     | , ,                         | an owner in a business that did so?   |  |  |
| ٥.  | -             |   |                                     |                             | in owner in a business that the so:   |  |  |
| 4.  |               |   |                                     |                             | nts violation complaint that was investigated or resulted in a  |  |  |
|   |               |   | No                                  | X                           |   |  |  |
| 5.  |               |   |                                     | , ,                         | arassment complaint that was investigated or resulted in a lawsuit?   |  |  |
|   |               | 9   |                                     |                             |   |  |  |
| 6.  |               |   |                                     | , ,                         | ile intoxicated?  |  |  |
|   | -             |   |                                     |                             |   |  |  |
| 7.  | Have you eve  |   |                                     |                             | over?   |  |  |
|   | -             | 3   |                                     |                             |   |  |  |
| 8.  |               | ks to all your<br>page if you h<br>https://ww | social med<br>ave one.<br>vw.facebo | lia acco<br>https<br>ok.com | unts (Facebook / Instagram / LinkedIn / Twitter, etc.) and your s://www.linkedin.com/in/stacey-kifolo; h/stacey.kifolo; https://www.instagram.com/kifolostacey; ifolo; https://www.snapchat.com/skifolo |  |  |
| 9.  |               | ing else in yo                                | ur backgro                          | und tha                     | at, if made public, would cause you, our client or our firm express or any other mechanism?   |  |  |
|   | Yes           | X   | No                                  |                             | See attached.   |  |  |
| 10.   | Please provid | de a list of any                              | lawsuits i                          | n which                     | h you are or have been a party either as plaintiff or defendant.  |  |  |
|   | See attach    | ned.  |                                     |                             | Attested to Milly Juni Signature of Applicant   |  |  |
|   | Please        | email this fo                                 | rm via PI                           | )E DO                       | CHMENT to Manigue Wich weed cam or via fay to   |  |  |

Please email this form via PDF DOCUMENT to Monique@cb-asso.com or via fax to (561) 621-5965 no later than 5:00 PM MST 05/15/2023.

(Note: Please be sure to sign the form with your actual signature if you are sending Fax or PDF Document)

Page 18 of 101

## **Section 5**

### Background Check Summary for STACEY LYNN KIFOLO Personal Disclosure Explanation

#### Personal Disclosure Questionnaire - Explanation

#### #9

In a simple Google search, results will include news articles that the City of Deltona suspended me in October 2022. No details will be found in news articles, which only raises speculations.

I was hired by Acting City Manager, John Peters, and began with the City in August 2021. On September 19, 2022, Mr. Peters voluntarily resigned and a majority of the Commission voted to install an assistant city attorney as the interim city manager. Within weeks, there was a public report of my suspension by the city attorney/manager. News articles note that the City would not provide details. In mid-October, the Commission hired as Acting City Manager, James Chisholm. On November 7, 2022, he was questioned during a public meeting about my suspension. Chisholm stated, "There was no disciplinary action taken. The action that was taken was administrative leave." As to the reason for the administrative leave, Chisholm stated, "There's no reason stated." Chisholm further stated, "There's no documentation that indicates anything that is disciplinary in nature. In fact, there is no documentation at all. Just that fact that there was action taken to put that person on administrative leave."

As can be the case with a change in management, Mr. Chisholm informed me that he was making management changes and would give me the option to resign or my at-will employment would be terminated. I chose to resign, seeing this as my best option to retain personal credibility and protect the positive reputation I have carried throughout my entire career.

#### #10

As of this writing, May 10, 2023, I have not been a party to a lawsuit either as a plaintiff or defendant. However, given the actions of the city attorney/manager, the defamatory public comments, and the potential for negative ramifications for my future employment, I have retained legal counsel.

# CB&A Reference Notes

## Reference Notes Stacey Kifolo

### Loren King – Former Commissioner, City of Deltona, FL 386-532-7915

Mr. King has known Ms. Kifolo since 2021. They had intermittent contact because of their roles in Deltona. She was always very responsive to the Commission, and she worked very hard.

Ms. Kifolo was a tremendous employee. She was very smart, asked all kinds of questions to ensure she understood the facts, and did a great job. She was tasked with fire union negotiations and did very well. Her decisions were good because she based them on fact and not on a feeling or on the opinions of others. She learned the truth and then acted on it.

Active in the community, Ms. Kifolo attended all the events. Deltona has many activities like a memorial day event, Halloween Spectacular, and a Christmas parade and she was always there. She worked very well with the public and was always willing to speak to constituents, even the difficult ones. They have a resident who calls all the time and can be a nuisance. Ms. Kifolo heard the employee speaking to him and asked about the call. She then instructed the employee to transfer the call to her the next time he called in. Unfortunately, the City Attorney was walking by at the same time and told the employee "No, you will not take the call." The Attorney prefers to ignore residents rather than trying to find a solution, but Ms. Kifolo always tried to do the right thing. She was very responsive. She interacted with the public when they called in or made an appointment. She was wonderful.

When asked questions about the budget, Ms. Kifolo could flip to the right page of the book, she seemed to know and understand the budget well. She was the one who figured out that the pension fund for fire employees was much more in debt than they thought. She was great at keeping everything straight and working with the budget.

Deltona is not an easy place to work. The Commissioners ask for workshops on items that do not need workshops. They put a moratorium on development and then left the staff to work out the changes. The new Commission extended the moratorium and still has not done anything with it, except for putting so much on the staff that they are exhausted. Even so, Ms. Kifolo completed her work and handled the stress well.

In Mr. King's opinion, the fire union is the reason that Ms. Kifolo is no longer there. The Union has too much power in Deltona. They support certain Commissioners during the elections who then advance their cause once elected. In meetings the Commissioners who were supported by the Union while running for office treated Ms. Kifolo in a way that was totally uncalled for just because she stated that the fire pension fund was \$14 million dollars in debt. The Union said that was a lie, that the debt was only \$7 million dollars. However, since her departure a financial report has been released that substantiates her statement, the fund is \$14 million dollars in debt. If that report had been released sooner, she may still be working in Deltona.

Anyone looking at Ms. Kifolo for a position should hire her. She is very smart, and she goes by the book. She does research before she speaks, which prevents lawsuits. She needs to be in government because she does it so well. She would do well for any community.

## Reference Notes Stacey Kifolo

### Words or phrases used to describe Stacey Kifolo:

- Very intelligent,
- Researches before she speaks,
- Understands the role of government,
- Hard worker,
- Responsive, and
- Ethical.

**Strengths:** Very intelligent, does her research, ensures accuracy, handled every task given

her well.

Weaknesses: Ms. Kifolo overheard a conversation between Commissioner McCool and the City Attorney where the Attorney stated she did not trust Ms. Kifolo. Ms. Kifolo came out of her office and there was a verbal altercation. Ms. Kifolo filed a complaint with HR and was told there would be an investigation, but it was never done. The Commission made the Attorney the Acting City Manager and she immediately put Ms. Kifolo on leave, which she was not authorized to do. The City then hired another Acting Manager. Under the advice of the City Attorney, and without taking the time to investigate the facts or form his own opinion, he let Ms. Kifolo go. His reasoning was that they needed new faces at City Hall. While Ms. Kifolo could have acted better when overhearing the initial conversation, she did not deserve to be placed on leave or dismissed as she was doing an excellent job.

#### Dana McCool – Commissioner, City of Deltona, FL 386-837-0025

Ms. McCool was a Commissioner for Deltona and worked with Ms. Kifolo from 2021 to 2022. Ms. Kifolo gave 110% all the time.

The Commission does not have direct involvement with operations. While Ms. McCool cannot speak to Ms. Kifolo's hiring ability, her relationship with the staff was very good. Ms. Kifolo makes good decisions. While she is capable of being innovative and a change agent, her greatest attribute is maintaining operations at a high level. She completed every task she was given while also giving them more than they asked for.

The public loved Ms. Kifolo, she was honest and open. She gave her word, never made empty promises, and always followed up. She was amazing. She is very proactive in her communication and keeps everyone informed.

## Reference Notes Stacey Kifolo

Negotiating the fire union contract was a process Ms. Kifolo led. She was great at consensus building and helped them realize cost savings through the process. She has great financial skills. Finding ways to save money is something she excels at.

Ms. Kifolo always accomplishes her tasks and does so in a timely manner. She should take more time off, but even in the most stressful of times she never acted out of character or lost control.

Ms. Kifolo has not been involved in anything controversial. Ms. McCool believes that Ms. Kifolo was too good at her job and the political climate was not accepting of that. The majority of those in Deltona back her up, so while she left it was not her fault or due to her job performance.

Ms. McCool would hire Ms. Kifolo and wants her to return to Deltona. She is a good manager, she understands storm mitigation, parks, water, public works, and constituency issues. She is very good at what she does. Ms. McCool misses Ms. Kifolo every day and recommends that any organization that has the opportunity to hire her, do so immediately. She is very capable, and she will protect the community.

#### Words or phrases used to describe Stacey Kifolo:

- Tenacious,
- Well organized,
- Very succinct in her communication, and
- Always did more than what she was asked to do.

**Strengths:** Great communicator, great analyst, great team leader.

Weaknesses: Needs to take more vacation.

### Rebecca Wilk - Human Resource Director, City of Deltona, FL 386-337-4222

Ms. Wilk has known Ms. Kifolo since 2021 and is providing a personal reference. Ms. Kifolo was very hard working and dedicated. She oversaw the Human Resource department as part of her responsibilities. She asked questions, gathered information, met with everyone to understand their role and what was working. When she found something that did not work, she made a plan to improve it. She was always very willing to help employees, particularly when they knew something needed to change but they had not yet had time to address it. She was compassionate. She moved everything forward for the best good for everyone involved and the community.

Staff hired by Ms. Kifolo are still working for Deltona. Her decisions in general are good. She maintains operations at a high level. When given a task, she is very good about sticking to the

## Reference Notes Stacey Kifolo

deadline, doing the necessary research, and asking the right questions. She enjoys looking at problems and figuring out how to solve them and is very innovative in her approach.

While Ms. Kifolo was out in the community, Ms. Wilk was not and cannot speak to the extent. Ms. Kifolo gave presentations to the public at Commission meetings. She also responded to questions. She was good at keeping others informed.

They were in the process of revising policy. Ms. Kifolo brought together the departments that would be affected by the policy adjustments. She led the discussion to determine what worked best for everyone. Though the work was not completed by the time she left, what they accomplished was very solid and will be utilized in the future.

Ms. Kifolo spent time reviewing their financials because of her success in this area with previous employers. She is very good at finding ways to save money and better ways to work.

At times Ms. Kifolo seemed a little exasperated but that is normal for the position because of the stress that comes with it. However, even when stressed, she continued to work. She overcame it and moved in the direction that she needed to.

While Ms. Kifolo has been involved in some controversy, Ms. Wilk is not able to discuss it due to her role. Nothing in Ms. Kifolo's background would concern a reasonable person. She resigned from Deltona. The only people who might have a different opinion of her could be employees who asked for things that she did not believe were necessary, so she did not approve them.

If Ms. Wilk had her own place of business, she would definitely hire someone like Ms. Kifolo. She is dedicated to public service and has been in place for a long time. Not everyone in government is in it for the right reasons, which is so important, but she is. She wants to serve the public. She is a very valuable employee and brought innovations that made the department better. They were sad to see her go.

#### Words or phrases used to describe Stacey Kifolo:

- Good sense of humor,
- Strong,
- Firm,
- Understanding,
- Direct, and
- Very forceful.

## Reference Notes Stacey Kifolo

**Strengths:** Very thorough, attention to detail, does research, very analytical.

Weaknesses: She has a strong personality and is a 'get it done' type of person. She is not afraid

to take the bull by the horns. While some may not like that approach, Ms. Wilk

believes that it is necessary.

#### Mari Leisen – Finance Director, City of Deltona, FL 386-717-9966

Ms. Leisen has known Ms. Kifolo since 2021. Ms. Leisen enjoyed working with Ms. Kifolo, she was very effective as a Deputy City Manager, and was an asset to the City.

Ms. Kifolo was tasked with negotiating the fire contract and she was very thorough in the process. She researched the facts as their pay is very complicated and she asked the right individuals for information. She was collaborative and her research was verifiable. She communicated extremely well with the other departments and was a problem solver.

Decisions made by Ms. Kifolo were good. She attended the bi-monthly Commission meetings and their monthly workshops, along with many other meetings. She worked very well with the public. She kept everyone informed. She accomplished tasks in a timely manner and was very good natured. 90% of the time she was smiling and upbeat, she was a positive force in the organization.

Having a good skillset in finance, Ms. Kifolo was over Human Resources (HR) and Finance, along with a few other departments. Finance and HR are very collaborative. The HR department hires employees and Finance pays them, and there is some overlap. When she arrived there were some issues between the two departments that she helped to resolve. Her greatest attribute was being a valuable intermediary between a City Manager who had a background in public works and did not speak finance, and the Finance department.

A Commissioner was upset because they felt that Ms. Kifolo was not timely in responding to an email, but the matter seemed to be mostly a political one. Her background is clear of any incident that might concern an employer.

The City Manager who hired Ms. Kifolo later resigned with a three month notice at a Commission meeting. The Commissioners asked him to leave that night. Shortly after that, Ms. Kifolo resigned. Talk around the water cooler was that she was asked to resign, but Ms. Leisen cannot say for sure.

Ms. Leisen would hire Ms. Kifolo, she would be a good manager. Her departure was a real disservice to Deltona.

# Reference Notes Stacey Kifolo

#### Words or phrases used to describe Stacey Kifolo:

- Positive,
- Thorough,
- Collaborative,
- Good researcher,
- Empathetic,
- Human touch, and
- Sincere.

**Strengths:** Extremely thorough, good at research and asking the right people for information,

collaborative, great at interdepartmental communication, problem solver.

Weaknesses: When first hired, she asked many questions about the staff and workflow, and it

came across that she felt she needed to fix things which was a bit off-putting to some employees. As they worked together, they realized that she very accepting

and supportive of the staff and just wanted to help them problem solve.

#### Elbert Bryan – Charter Review Board, City of Deltona, FL 386-837-9088

Mr. Bryan has known Ms. Kifolo since 2021. He frequently attends Deltona Commission workshops and meetings and served on a Charter Review Board with Ms. Kifolo.

Ms. Kifolo did a top-notch job. She gave the Charter Review Board the information they asked for and did not push any subject or try to control the outcome. Her role was to answer questions without influencing the perspective and she did very well. She was also quick to return with an answer if she did not know it on the spot.

Decisions made by Ms. Kifolo were good because she did quite a bit of research prior to making a decision. She was also adept at negotiations and was tasked with the fire union contract. The process and the negotiations went very well. She was the one to present the retirement fund and pension plan, which indicates that she has good financial skills.

When out in the community, Ms. Kifolo represented the City and herself well. She worked well with charter review board members, and with residents on permitting issues. She also worked closely with the planning and zoning board.

One stressful situation involving Ms. Kifolo was when a Commissioner drilled her fairly aggressively. She handled it well. She stood her ground without being aggressive and did not lose her temper. As the process moved on and more research was completed, the facts backed Ms. Kifolo's perspective.

# Reference Notes Stacey Kifolo

Deltona did a great deal of research on Ms. Kifolo prior to hiring her, and everyone from East Buffalo gave her kudos. They did not hear a single negative comment about her. In negotiations, she was correcting matters that had been ignored for years, but this was not controversial. Nothing in her background or conduct would concern a reasonable person.

Turnover in the Commission resulted in turnover in the staff, which is why Ms. Kifolo separated from Deltona. A new manager was hired, and he wanted to go in a different direction. He replaced almost every department head, including the attorney. Some of the old Commissioners might have a different opinion of Ms. Kifolo, but that is typical in the political world.

Mr. Bryan would hire Ms. Kifolo in a heartbeat. She is honest, has integrity, is very intelligent, and she does not mince words. She would be a great manager. She is very capable, and her accomplishments speak for themselves.

#### Words or phrases used to describe Stacey Kifolo:

- Intelligent,
- Personable.
- Well educated,
- Very outgoing,
- Not overly aggressive, and
- Worked very well with others.

**Strengths:** Research ability and a very strong work ethic.

Weaknesses: On occasion she could talk above the Commissioner's heads and had to simplify

it for them. She is almost too smart for her own good.

#### Mike Daniloff – Former Township Supervisor, East Buffalo Township, PA (570) 412-9378

Mr. Daniloff has known Ms. Kifolo since 2014 when he was elected as a Township Supervisor. Ms. Kifolo is an intelligent, talented manager. Her job performance is not affected in difficult and stressful situations. Mr. Daniloff worked in the private business sector on an executive level for many years and has a good foundation for judging people like Ms. Kifolo. She is an exceptionally skilled person.

Ms. Kifolo deals with the supervisors and the taxpayers in a compassionate way. She has excellent people skills. She works well with the supervisors, who often have difficulty understanding things.

# Reference Notes Stacey Kifolo

Ms. Kifolo is skilled at anticipating issues. She is constantly looking ahead for potential problems. If she anticipates something, she presents the supervisors with alternatives and ways to prepare for the future. She works on an agenda to carry the township forward.

Ms. Kifolo generally makes good decisions when hiring personnel. At one time, she and the board were searching for an administrative assistant. She hired a local person who seemed like a good choice, but things did not work out. The new assistant had other aspirations and resigned from the position.

Ms. Kifolo is innovative. She consistently has creative ideas for the township supervisors. At one time, the township participated in developing a shopping area. Ms. Kifolo made well-informed recommendations to the developers and the supervisors.

Ms. Kifolo works closely with community agencies. She attends luncheon meetings with the local school superintendent. She works with agencies from the neighboring borough. She is involved in managing the regional police department that the township shares with the borough. She set up a commission to govern the police force. At one point, Ms. Kifolo was appointed as one of the Buffalo Valley Regional Police commissioners.

Ms. Kifolo is even-keeled and keeps her temper, though she is impatient at times. She gives information and the reasons behind her decisions in a calm and intelligent way. She deals with agitated citizens well.

Ms. Kifolo is a great communicator. She gives all information about board meetings to the supervisors ahead of time. The way she communicates is easy to understand. She is customer service oriented and knows that she serves the taxpaying citizens of East Buffalo Township.

Ms. Kifolo handles stress well. At one time, a former Township Supervisor was incessantly verbally harassing her. He often made attacks on her character and her gender. He saw Ms. Kifolo as a threat to his management skills. When Mr. Daniloff spoke with Ms. Kifolo privately about this situation, it was clear that it was affecting her. In public, she handled it well. The supervisor in question decided not to stand for re-election and he is no longer on the board.

Ms. Kifolo has not been involved in anything controversial. There is nothing concerning in her background or conduct. She is a determined person who always seeks to improve herself. She is an exceptionally talented manager, and any community would be lucky to hire her. Mr. Daniloff highly recommends her for the position.

#### Words or phrases used to describe Stacey Kifolo:

- Determined,
- Experienced,
- Great communicator,
- Intelligent,
- Compassionate, and
- Strategic.

# Reference Notes Stacey Kifolo

**Strengths:** Anticipating problems, and strategic planning.

Weaknesses: Impatience.

# Matt Schumacher – Former Township Supervisor, East Buffalo Township, PA (570) 412-0223

Mr. Schumacher has known Ms. Kifolo since 2015. He is an elected township supervisor in East Buffalo Township. Ms. Kifolo is a great town manager and a good person. She lived in Florida and worked virtually as Township Manager. This change did not affect the quality of her work.

Ms. Kifolo constantly seeks to better the organization. She will do whatever is needed to accomplish her goals. She is exceptionally focused on her job. She does not hesitate to put in extra hours on a project.

Ms. Kifolo is loyal to the board of supervisors. She follows what the board decides, even if she disagrees. She advises the board with facts and strives for what is best for the township. She makes good decisions.

Ms. Kifolo has a straightforward and direct management style. She is skilled at delegating tasks and does not micromanage. She is not afraid to tell people when they are doing something wrong.

When Ms. Kifolo was still living in East Buffalo Township, she did not often go out into the community unless it was needed. The Roadmaster had that responsibility. Ms. Kifolo had good people skills and interacted with the public well. She always listened to people when they came to her with concerns. She responded to them in a timely fashion.

Before Ms. Kifolo became the township manager, East Buffalo Township had no pension plans set up for retired township employees. When Ms. Kifolo discovered this, she started a fund to secure retirement benefits. She convinced the board to take out a loan of half a million dollars to fund the program. This money was invested and grew with the interest rates. The plan worked perfectly, and the loan was paid off within two years. This was a major success for the township. They were able to pay the pensions without taking money out of the general township funds.

Ms. Kifolo is calm under stress. She is skilled at remaining calm in tense situations. She does not lose her temper or take out strong emotions on her colleagues. She takes her notes back to her office and resolves the issue privately.

Some employees of the Township disagreed with the virtual nature of Ms. Kifolo's work and wanted a manager who was physically there. Ms. Kifolo will be an excellent city manager for any municipality. She did a wonderful job in East Buffalo Township.

# Reference Notes Stacey Kifolo

#### Words or phrases used to describe Stacey Kifolo:

- Focused.
- Driven,
- Thoughtful,
- Proactive, and
- Analytical.

**Strengths:** Proactivity, efficiency, communication, research skills, and financial skills.

Weaknesses: Impatience.

#### Peter Matson – Attorney, Lewisburg, PA (570) 523-3285

Mr. Matson has known Ms. Kifolo's family since about 1980. He has known her individually since 2010. She was a fantastic manager for East Buffalo Township.

When Ms. Kifolo became Township Manager, she implemented many positive changes. She helped organize the township and improved its financial condition. She was detail-oriented and meticulous.

Ms. Kifolo made good recommendations to the Board of Supervisors. She made good decisions when involved in hiring personnel. She was innovative and put the township on better financial footing. There were some future expenses such as pensions for retired employees that the township was not prepared for. She set up a reserve account for this purpose that was funded on an annual basis. She also set up financial reserves for capital projects.

Ms. Kifolo attended township meetings and other meetings with contractors. She did well in a group setting but was probably better at one-on-one interactions. She participated in these meetings remotely, after she moved to Florida in 2018. She dealt with the public and answered their questions in a straightforward way. She was a good communicator.

Ms. Kifolo completed tasks in a timely manner. She generally handled stress well. She was not involved in anything personally controversial. She followed the laws and ordinances of the township. Sometimes members of the public are upset when she refused to bend the rules to please them.

East Buffalo Township is adjacent to the Borough of Lewisburg and there is some political tension between the two municipalities. This friction has existed for many years. There is likely someone in the borough who does not have a high opinion of Ms. Kifolo for one reason or another.

# Reference Notes Stacey Kifolo

Ms. Kifolo has done an excellent job as manager. Mr. Matson would hire her immediately if he could. He highly recommends her for the position.

#### Words or phrases used to describe Stacey Kifolo:

- Thorough,
- Dedicated,
- Intelligent,
- Conscientious, and
- Consistent.

Strengths: Interpersonal skills, patience with people who are upset, and persistent problem-

solving.

Weaknesses: Tendency to want to resolve issues until they are perfect.

# Shawn McLaughlin – Planning and Economic Development Director, Union County PA (570) 524-3840

Mr. McLaughlin has known Ms. Kifolo since about 2012. They have worked on many professional projects together. Ms. Kifolo is cordial and professional. She conducts herself well in difficult situations. She is fiscally responsible. She brought a level of professionalism to East Buffalo Township that was not there before.

Ms. Kifolo has good judgment and makes good decisions. She is innovative, though many of her creative ideas are hindered by local codes and ordinances. She is customer service oriented toward all people she encounters. She makes sure her employees, contractors, elected officials, and taxpayers are all treated fairly.

Ms. Kifolo attended monthly meetings with the public, as well as county meetings representing her township. She interacted well with the taxpayers. She was a great communicator and provided people with exactly the amount of information they need. She did not give too much or too little information.

Ms. Kifolo handles stress relatively well. She often exercises to relieve her stress. She also has conversations with peers and colleagues to talk through difficult situations.

Ms. Kifolo handles controversial issues well. At one time, there was an issue regarding solar panels. A local university wanted to install the panels, but citizens in a nearby neighborhood were opposed to the idea. Ms. Kifolo helped broker a solution in which a solar ordinance was created. The university placed the solar panels in a place that did not offend the neighbors.

# Reference Notes Stacey Kifolo

Ms. Kifolo is a highly capable professional who is an excellent Manager. She understands local government and has the necessary skills. Mr. McLaughlin recommends her for the position.

#### Words or phrases used to describe Stacey Kifolo:

- Professional,
- Cordial,
- Creative, and
- Conscientious.

**Strengths:** Preparedness, financial skills, and analysis skills.

Weaknesses: None identified.

# Cynthia Peltier – Co-Founder and Director, CommUnity Zone, Lewisburg, PA (570) 713-7479

Ms. Peltier is a citizen of East Buffalo Township and has known Ms. Kifolo since 2018. Ms. Kifolo is a good listener and is easy to work with. She and Ms. Peltier often conversed about social justice matters and other township issues that arose.

At one time, Ms. Peltier came to Ms. Kifolo regarding the traffic in front of her house. Passing cars knocked down her mailbox on more than one occasion. Ms. Kifolo addressed the issue and made sure there was a yellow pole placed in front of Ms. Peltier's home, and the mailbox problem was solved.

East Buffalo Township shares a police department with the Borough of Lewisburg. This situation causes some tension in the two communities, especially concerning which finances are shared. Ms. Kifolo was involved in mediating some of this contention. There are likely people from the Borough of Lewisburg who have a negative perception of Ms. Kifolo because of this issue.

Ms. Kifolo is a good problem-solver. She is strong-willed and always prepared. Even when others do not agree with her, she remains focused. She is steadfast in what she believes to be right. She is a good advocate for causes she believes in. Ms. Peltier recommends her for the position.

#### Words or phrases used to describe Stacey Kifolo:

- Determined,
- Intelligent,
- Prepared,
- Welcoming,
- Creative, and
- Visionary.

# **Section 5**

# Reference Notes Stacey Kifolo

**Strengths:** Openness, preparedness, and willingness to listen to citizens' concerns.

Weaknesses: Too strong-willed at times.

# Seth Heintzelman – Audit Firm Partner, Herring, Roll, & Solomon, Danville, PA (570) 286-5895

Mr. Heintzelman has known Ms. Kifolo since 2015. He performs the annual audit for East Buffalo Township. He does not know Ms. Kifolo well but had no issues with her. She was a great person to work with.

Ms. Kifolo was responsible and never lost track of details. She was attentive to the needs of the auditor. She was professional and kind. She generally made good decisions.

Ms. Kifolo was customer-service oriented. She interacted well with both colleagues and residents of East Buffalo Township. She had excellent financial skills. She was skilled at budgeting, as well as searching for grants and funding for the Township.

Ms. Kifolo has many responsibilities as Township Manager and handles her stress relatively well. She has not been involved in anything controversial. There is nothing concerning in her background or behavior. She is a great Manager.

#### Words or phrases used to describe Stacey Kifolo:

- Professional,
- Timely,
- Courteous, and
- Responsible.

**Strengths:** Promptly brings issues to the attention of the appropriate party.

Weaknesses: None identified.

**Prepared by:** Lynelle Klein

Colin Baenziger & Associates

CB&A Internet Research

#### Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

West Volusia Beacon February 1, 2023

#### Deltona commissioner files ethics complaint against fellow commissioner Al Everson

In the largest city in Volusia County, the hits just keep on coming.

Bad blood, bad words and an ethics complaint filed by one Deltona city commissioner against another commissioner have come to light. Commissioner Maritza Avila-Vazquez has asked for a state investigation of Commissioner Dana McCool's alleged use of vulgar words in a confrontation last fall, following a buildup of tensions and a verbal assault that happened shortly before the Nov. 8 general election.

Tension between Avila-Vazquez and McCool came to a boiling point after the City Commission ended its Oct. 3 meeting. As they were leaving the long meeting — which did not end until 1 o'clock the next morning — Avila-Vazquez said, she encountered McCool. "She [McCool] kept on using F-bombs towards me and was very threating [sic] with her words," Avila-Vazquez wrote in the complaint. "I believe at one point I had the opportunity to ask her what her problem was, she responded by saying, 'You and your F-bombs words.' She walked away still cursing at me. Her final words were: 'It's OK. You have four F-bomb weeks left, and then [you] will be out of here.' Elections were just four weeks from that day."

That election would result in Avila-Vazquez being returned to office by voters. McCool had not been up for re-election, but had supported Avila-Vazquez's opponent, according to Avila-Vazquez. "I found this exchange, to be disrespectful behavior in the presence of employees and other elected officials," Avila-Vazquez continued, in the complaint. "Particularly coming from an elected official who should respect the Code of Ethics that, she agreed to respect when she took her seat in office."

Avila-Vazquez concluded her complaint with a "request to press Ethics charges against Commissioner Dana McCool for her disrespect towards me and those present at the time she used inappropriate language towards me." "I trust that whatever actions are taken towards her disrespectful behavior will deter other elected officials from doing the same," Avila-Vazquez wrote. Though Avila-Vazquez declines to talk about her ethics complaint, McCool is not reticent.

"She is entitled to her opinion about protocol and decorum, and I'm entitled to my opinion," McCool said. "People get mad. They work through it, and they move on. I got mad about it. I did some self-inventory. We need to move on." McCool said she had not yet received any letters from the Commission on Ethics regarding the complaint against her.

The Florida Commission on Ethics has the authority to censure or impose fines on elected officials found to have violated state standards of conduct for elected officials.

#### Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

Avila-Vazquez didn't want to talk about the complaint she filed. "I'm not going to say anything about it," she told The Beacon. Animosity began developing between the two women beginning in July 2022, according to Avila-Vazquez, who was then vice mayor of Deltona. Avila-Vazquez said she had asked then-Acting City Manager John Peters to advertise a breakfast for teachers.

Avila-Vazquez wrote that she had been asked by an outsider organization to publicize the event, which would be open to the public. She said she "finally received an answer from Ms. [Stacey] **Kifolo** [then deputy city manager] 13 days later, denying the request." Actually, Avila-Vazquez wrote, "There was no city policy on advertising."

The matter seethed until the Aug. 15 meeting of the City Commission, when Avila-Vazquez publicly questioned **Kifolo** about why her request had been rejected. Three commissioners, Avila-Vazquez alleged, then accused her of being disrespectful toward **Kifolo**. "Although my tone of voice was stern, my intentions were not of disrespect but rather to get information on the policies or policy she followed to make her decision. I was particularly vilified by Commissioner McCool," Avila-Vazquez continued, writing in the complaint.

What vilifying words were exchanged on that occasion are not mentioned. Because she directly questioned Kifolo rather than asking Peters, Avila-Vazquez noted, she also came under fire from some residents who claimed she had violated Deltona's charter, by interfering in the administrative branch of the city government.

Under the city-manager form of government in effect in Deltona, the mayor and the commission serve as a legislative and policymaking body, and the elected officials are prohibited from interfering or involving themselves in the day-to-day affairs of the administration, overseen by the city manager. Elected officials who do not adhere to the very strict separation of powers in the city's charter may risk being removed from office.

The complaint, dated Dec. 13, 2022, urges the Florida Commission on Ethics to take unspecified action against McCool "for her disrespect towards me and those present at the time she used inappropriate language towards me," Avila-Vazquez wrote. The post Deltona commissioner files ethics complaint against fellow commissioner appeared first on The West Volusia Beacon.

#### Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

The Daytona Beach News-Journal October 10, 2022

# Deltona deputy city manager gets suspended - Official says the interim post has attracted more than a dozen applications

Deltona's deputy city manager was suspended with pay last week, officials said. **Stacey Kifolo's** status was confirmed Friday afternoon by Rocco Anastasio, the city's spokesperson, but additional information wasn't immediately available. **Kifolo**, who was hired in August 2021 with a starting salary of \$135,000, didn't respond to requests for comment Friday afternoon.

Mayor Heidi Herzberg also confirmed the suspension Friday afternoon but said she didn't have additional information. **Kifolo's** suspension comes less than a month after the City Commission voted 4-3 to accept a modified version of the proposed resignation put forth by John Peters III. Peters, a licensed engineer, offered to stay on as acting city manager until Nov. 17. Commissioner Anita Bradford made a motion to accept the resignation immediately during the Sept. 19 meeting, effectively putting Peters on paid leave until Nov. 17. During last Monday's commission meeting, Marsha Segal-George, from the city attorney's office, offered to stay in the role of interim manager while helping set up interviews for interim manager candidates.

Bradford said during a special meeting Sept. 26 that she'd received a call and email from Jim Chisholm, former longtime Daytona Beach city manager, regarding the role. By Friday, the city had received 15 applications for the role of interim city manager, Anastasio said. The names of the applicants were not immediately available. A special commission meeting regarding the candidates has been scheduled for Wednesday at 2 p.m.

During the Sept. 19 meeting, commissioners Loren King and Dana McCool questioned the mayor's suggestion to appoint Segal-George in the interim when Kifolo works as the deputy city manager. Herzberg said **Kifolo** is new to Florida, and Segal-George knows Florida law and Deltona's goings-on and has experience managing municipalities. Before working for Deltona, Kifolo served as the manager of East Buffalo Township, a community of about 7,500, in Pennsylvania, just over 60 miles north of Harrisburg. According to July 2021 Census Bureau estimates, Deltona has a population of 95,782.

#### Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

Daytona Beach News-Journal April 5, 2022

Deltona commission moving 2 of Charter Review Committee's 5 proposed amendments forward Committee chair disappointed with nixing of 3 recommendations

Katie Kustura

The Deltona City Commission wants further discussion on proposed charter amendments that could change their compensation and set a term limit for "acting" charter officers. The commission during a recent workshop gave consensus to move forward the following two amendments recommended by the Charter Review Committee:

- Shall the City of Deltona Charter be amended to modify the salary of the mayor to be equal to 50% of the Volusia County chair and the salary of the commissioners to be equal to 50% of the Volusia County Council Members?
- Shall the City of Deltona Charter be amended to add language to provide for a maximum term of 18 months that the charter offices of city manager and city attorney may be appointed as acting, and to provide for an additional term of six months for extraordinary circumstances?

The commission chose to not move forward on the following:

- Shall the City of Deltona Charter be amended to modify composition and qualifications to allow for city commissioners to reside in a district and be elected on a city-wide basis?
- Shall the City of Deltona Charter be amended to increase the Charter Review Committee to seven members and to require any proposed charter amendments to be placed on the ballot of the next general election?
- Shall the City of Deltona Charter be amended to add a provision requiring standards, procedures, requirements and regulations to provide for environmental considerations on major decisions undertaken by the City Commission or city planners?

A special meeting to discuss the amendments is set for 6:30 p.m. Wednesday at City Hall.

The seven-member Charter Review Committee, which included two alternates, met more than a dozen times, beginning last July. After reviewing the city's charter line by line, the group recommended five amendments to be put forth on the ballot during the next general election.

Deltona resident and former longtime Volusia County Council member Pat Northey chaired the committee, which also included Vice Chair Chris Nabicht, a former city commissioner, and members Phyllis Allen, Elbert Bryan, Donald Philpitt and alternate members Jeffrey Brower (not the Volusia County Council chair) and Marisol Ortiz-Morales. The city's charter, which was adopted by a referendum in September 1995, requires that it be reviewed at least once every decade. Amendments were made in 2001, 2008 and 2014.

#### Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

Deputy City Manager **Stacey Kifolo** said a city's charter is comparable to the constitution and defines the structure of its government. "It establishes the terms of the elected officials and the manner of their election and also outlines powers, authorities, functions and essential procedures," **Kifolo** said. The commission also has the option, per state law, to add a charter amendment to the ballot via an ordinance. Additionally, a municipality's electors may submit a proposed charter amendment upon having 10% of registered voters sign a petition.

Commissioners shared their thoughts as **Kifolo** took them through each proposed amendment. They first discussed the proposal of being elected on a city-wide basis. Commissioners agreed that while the decisions they make generally impact the city as a whole, the districts are in place for a reason. **Kifolo** and Skip Fowler, city attorney, also expressed reservations about its legality, pointing to cases in the Voting Rights Act where at-large elections were challenged.

In discussing proposed changes to compensation — which isn't required by the charter — all of the commissioners said they weren't in it for the salary. Some commissioners expressed support for some level of increased compensation, but not to the extent of what was proposed. "I think that a good salary being paid to elected officials in the City of Deltona would attract more people to run for office," Vice Mayor Maritza Avila-Vazquez said. Commissioner Loren King said he didn't even know the position included compensation when he first made the decision to run.

The annual salary of the Volusia County Council chair is \$57,357, and council members each are paid \$47,797. The mayor and members of the commission presently are paid \$14,187 and \$10,520, respectively. According to the charter, said compensation "shall not include benefits, except medical benefits under the City's group health insurance plan, the premium costs of which shall be fully paid by the members of Commission who elect coverage."

Commissioner Dana McCool said she ran for office because she loves public service. "At the same turn of the coin, my time is worth something," McCool said. When it came to talking of charter officer terms, Mayor Heidi Herzberg said her "first question is what is an extraordinary circumstance?" "Ambiguity in a charter is a big problem," Herzberg said.

**Kifolo** said they could consider a full rewrite of the charter, which includes some things that are already addressed by state statutes.

"This is one of those areas where I think we have some hard decisions to make," King said. "We have someone in a temporary position that's doing a better job than anybody in the past 10, 15 years has done, and we have seen some really, I think, amazing and good changes in the City of Deltona." Commissioners and a number of residents have expressed strong support for John Peters III, who went from public works director to acting city manager at the end of 2020 through a contract. Peters, who owns a home in DeBary where he lives with his wife, has said he doesn't plan on moving. Commissioner Anita Bradford said her concern about the proposed amendment was that residents have previously voted in support of having the manager live in the city.

#### Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

The Daytona Beach News-Journal September 13, 2021

Deltona's acting manager rescinds tabled resignation, introduces new deputy city manager Author: Katie Kustura

Deltona's acting city manager's proposed resignation is no longer on the table. Commissioner Loren King during Thursday night's meeting made the motion, saying he felt the issues that prompted the proposal "pretty much have been resolved."

After some confusion among officials as to how exactly the motion should be worded to achieve the desired outcome, John Peters III said he was rescinding his resignation. "I noticed that Mr. Peters purchased some frames to put some pictures up on his wall," King said with a smile. Any search for a permanent city manager would occur "down the road," King said.

Peters' work as acting city manager has received positive reviews from commissioners and residents alike. The proposed resignation stemmed from what Peters said was interference from commissioners that was affecting his ability to do his job.

In June, when the proposed resignation came before the City Commission, those on the dais unanimously voted to table it until the first meeting of 2022. "Personally, I don't believe we've had a better city manager in 10 years or more," King said of Peters during the June 7 meeting, a comment that received applause from many of the residents in attendance.

During Thursday night's meeting, Peters formally introduced the commission to **Stacey Kifolo**, who was hired last month to serve as the deputy city manager with an annual salary of \$135,000.

**Kifolo** most recently served as the manager of East Buffalo Township, Pennsylvania, which has a population of about 7,500. **Kifolo** held the position from 2012 until she resigned this summer. When she moved to Florida in 2018, she did her job remotely after the township's attempt to transition to someone else didn't work out.

Peters said **Kifolo** will oversee multiple departments, including finance, IT, public information, human resources and the city clerk. "She is doing an awesome job," Peters said. "The good news is she's reporting back that we have an incredible group of people."

At **Kifolo's** suggestion, one of the commission's workshops in October will focus on the Firefighters' Pension Plan Board of Trustees.

#### Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

Daily Item, The (Sunbury, PA) May 10, 2021

#### EBT supervisors adopt sign ordinance, hear of BVRA financial woes

Author: Eric Scicchitano

East Buffalo Township Supervisors adopted revisions to an existing ordinance governing non-permanent signs in order to conform with a U.S. Supreme Court ruling mandating political signs aren't treated any differently from other types.

The revision "eliminates the distinction" between political signs and others, Solicitor Pete Matson said. Makenzie Stover, township zoning officer, said the former version of the ordinance had different regulations for campaign signs compared to yard sale signs, real estate signs and others. "We're trying to come into compliance with what the Supreme Court is saying. We recognize that our current ordinance would not stand up in court," Township Manager **Stacey Kifolo** said. "From my reading, I think it's making things less restrictive than the previous ordinance," Supervisor Jim Knight said.

The revised ordinance defines non-permanent signs, which include promotional flags and advertising banners, as specific to an event with a specified time period such as an election and not, say, a specific cause even if it's perceived as political. In response to a question from resident Katie Evans, also a candidate for the township board, Supervisor Char Gray said that a candidate's sign with an election year on it would fall under the ordinance. A sign with that same candidate's name but without a year wouldn't be regulated since it's not event-specific, Gray said.

The signs are restricted to 6 square feet in size in residential zones and 20 square feet in commercial, agricultural, woodland and agricultural/residential zones. They're not permitted to be illuminated and are not permitted in public right-of-ways. Signs must be separated by 10 feet in the more populated residential zones and 25 feet in other areas. This is meant to prevent "sign stacking" where one candidate could obstruct the view of another's sign, Supervisor Matt Schumacher said. "If you put your sign out first, the other person can't put their signs around you 2 feet away," Schumacher said.

Township resident Margaret Marr warned that in her opinion, the revised ordinance didn't provide enough clarity and felt it could instill a chilling effect on free speech. She also suggested, which went unheeded, larger signs be allowed at homes along Routes 15 and 45 since the speed limit is higher and wouldn't allow motorists to take in the full message of something more complex than a speed limit sign.

Stover said initial enforcement of the ordinance would bring about warnings for violators and guidance on how to come into compliance. Further non-compliance could bring a citation and fines of up to \$500 for each violation. BVRA money issues Schumacher and Gray agreed the township should meet with representatives of Lewisburg Borough Council to discuss the future of the Buffalo Valley Recreation Authority.

#### Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

Schumacher expressed frustration about the organization's financial standing. Gray estimated the township is providing \$123,000 this year while the borough will provide \$69,000. Schumacher said township taxpayers are too often used to supplement operations of programs that go beyond the authority's scope.

Describing herself as a fiscal conservative, Gray said after thorough review of the authority's finances she believes it is in need of greater monetary contributions from the township and borough. The gymnastics program, which generates comparatively substantial revenue, isn't bringing in money as it had in the past because of limited participation due to COVID-19 regulations. She said the swimming pool this year is projected to lose \$49,000. Schumacher credited Gray and the authority's executive director, Shirley Nelson Brough, for their work. "I'm not against it but we keep throwing money at this thing. It's not going to go away. It's just going to get worse," Schumacher said.

#### Other business

Meghan Beck and Dr. Lenaire Ahlum gave a presentation seeking support for the proposed Susquehanna Valley Community College. Gray said the board would review the proposal before potentially deciding at its next meeting about writing a letter of support. Gray said the township board completed a round of interviews for the manager position. There was "nothing to report" as to job offers. **Kifolo** hasn't said if she's seeking to retain the position.

There's been no decision yet in the lawsuit brought by Lewisburg against East Buffalo Township and the Buffalo Valley Regional Police Commission concerning municipal contributions to the regional police budget. The township and borough met several times to create a new intergovernmental agreement for municipal oversight of the regional department. Some clarifications are needed from the borough regarding suggested language. Other than that, Gray said it would be provided for review by the borough and its solicitor. The township's own solicitor has already reviewed the draft proposal.

Supervisors voted to transfer \$166,292 to a parks and recreation reserve account to raise the total to \$650,000. Another \$200,000 in grant funding is approved for the township's pending park project next to the municipal building on Fairground Road. Construction on phase one of the project is anticipated next year.

Contracts exceeding a combined \$142,000 were awarded for the paving and seal coating of Pheasant Ridge Road, from Country Road to Stein Lane, and Supplee Mill Road, from Furnace Road to Route 15. Umbriac Trucking of Harleigh received the paving contract and Russell Standard of Fayetteville received the seal coating contract.

#### Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

https://autos.yahoo.com/ebt-investment-negates-potential-tax-171800709.html The Daily Item, Sunbury, Pa. April 15, 2021

#### EBT investment negates potential tax increase for post-retirement benefits

Author: Eric Scicchitano,

Careful planning allowed East Buffalo Township to grow an investment portfolio dedicated to cover employees' post-retirement benefits without necessitating a tax hike, according to township officials.

East Buffalo's investment with American Funds, a large-blend stock fund, reached \$1.6 million and is growing, township manager **Stacey Kifolo** said during Monday's Board of Supervisors meeting. The township's estimated total liability for post-retirement benefits is more than \$2 million, leaving a net liability of about \$500,000.

"There won't be any tax increases to residents to pay for these post-retirement benefits," Supervisor Char Gray said during the meeting.

Non-uniform employees are eligible at age 65 or older to receive supplemental medical and prescription coverage on top of Medicare benefits. They're also eligible for full vision and dental coverage. These benefits are available until they die. Police officers are eligible to receive full coverage for all four benefits as early as age 55. The post-retirement benefits transition to the same coverage as non-uniform employees once the officers reach age 65. Uniform retirees are eligible for 15 years after retirement. The township's liability was \$3.3 million in 2016 when in September of that year, supervisors moved to invest \$900,000 in the market.

The board began in 2013 to build a reserve account to support post-retirement payouts. The account reached \$400,000 in 2016. The funds were coupled with a \$500,000 loan to invest. That loan was paid off in 2019 at an added cost of \$24,500, well below the dividends made on the market play.

Also, in 2016 former supervisor Mike Daniloff and current supervisor Matt Schumacher approached the Buffalo Valley Regional Police Department to shop its medical benefits plan. It was discovered the department could save about \$180,000 annually for comparable coverage, **Kifolo** said, and greatly reduced the post-retirement benefits liability for uniform employees.

The township can now draw from its reserves and offset post-retirement benefits costs rather than pulling from the general fund and raising taxes, **Kifolo** said. "I'm very confident that the township has the funding available now without raising taxes," **Kifolo** said.

#### Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

Daily Item, The (Sunbury, PA) March 30, 2021

#### EBT, Lewisburg talk funding formulas for regional police

Author: Eric Scicchitano

The sixth negotiating session concerning a regional police agreement raised the primary topic of dispute Tuesday between Lewisburg and East Buffalo Township: municipal funding contributions. What and, more consequentially, how the municipal partners contribute directly to the operations of the Buffalo Valley Regional Police Department is at the center of the five years-long dispute between the two and, ultimately, the still-pending lawsuit Lewisburg brought against East Buffalo Township in 2019.

Monday's non-binding talks between representatives of both sides were largely dedicated to how they might agree on an established formula to make the municipal funding contributions. Representing Lewisburg were council members Jordi Comas and Mike Derman along with Mayor Judy Wagner. Supervisors Char Gray and Jim Knight as well as Manager **Stacey Kifolo** represented East Buffalo Township.

Perhaps surprisingly, East Buffalo Township proposed paying the greater part of a 52-48 percent split — the same split the township board has argued is unfair in its quest to permanently lower it to something akin to 50-50. And, the township proposed either municipality pay 1 percent more for each 10% increase in their respective population size.

Members of both sides have said the township is not only larger and has more valuable taxable properties, but is also growing faster and likely will continue to do so. "Our goal was certainly to simplify the formula to make it clear and easy to understand. To that end, we would propose a percentage allocation, get rid of PPUs," Gray said, referring to the Police Protection Unit measurement currently in place used to allocate patrol hours to either municipality.

East Buffalo Township's proposal comes as Union County President Judge Michael Hudock weighs its attempt in court to have Lewisburg's lawsuit dismissed and uphold its own interpretation of the existing contract — the one both sides would like replaced.

A ruling in the township's favor would allow either municipality to request a set amount of police coverage year to year under existing terms, something the township has done since 2017. Prior to 2017, the township had abided by the 52-48 split. The existing contract isn't likely to see an extension anyway as the township board voted last year to leave the regional police cooperative if a new deal isn't reached.

Lewisburg's representatives had proposed a broader formula incorporating population size, road miles patrolled by the department and the number of incidents in either municipality. That latter statistic would favor the township compared to the prior two. Though Lewisburg didn't discuss specific percentage splits as definitively as East Buffalo Township, Comas said calculations from

#### Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

the borough's perspective had the township paying anywhere from 58 percent to 61 percent. He didn't favor that. "We don't want the police department to go away and we don't want a situation where the allocation is really imbalanced, in the sense that East Buffalo is paying, let's call it too much," Comas said. "North of 58 percent, that seems to me too much."

Because of the amount of police activity in the borough compared to the township, it generates more revenue through fines and fees. That difference combined with the township's 52-48 percent proposal "feels like we're paying a lot," Comas said.

**Kifolo** cautioned that whatever formula may result would likely need to be revisited, and altered, should a neighboring municipality ultimately choose to join the regional police department.

Police Chief Paul Yost encouraged the two sides to reach an agreement on a defined set of criteria in whatever formula might result. That could help future elected officials and commission appointees avoid disagreements like what arose from the current contract. "If you have a good formula, no matter who's sitting at the table that's what you're using. It takes the arguments out," Yost said.

So, the two sides talked over the matter towards reaching a middle ground. They didn't reach an agreement on figures; however, they did agree to pull the same data figures on population, road miles and incidents to run through the formulas and see what the results look like.

As to potential future court battles, both sides said they'd hope to avoid that altogether in the future. They discussed adding mediation and arbitration as avenues for conflict resolution prior to the courts. Comas, Knight and Derman went back and forth about whether incorporating language about arbitration without specific rules of procedure and evidence might or might not disadvantage either side. The two sides agreed more information would be sought on this topic, too. The next meeting is set for 5:30 p.m. April 6. All the sessions have been held online and are open to the public. To register, visit www.ebtwp.org.

#### Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

Danville News, The (PA) March 17, 2021

Some Valley agencies meeting in person; others remotely or both

Author: Staff reports

A year into the COVID-19 pandemic, some Valley government agencies have returned to inperson public meetings while many others continue in remote fashion only. Yet others are offering a mix, with a limited in-person attendance with live feeds online. During Sunshine Week, The Daily Item reached out to municipalities, school districts and counties to review what access is available for meetings. Some municipalities are reporting larger audiences for online meetings. In Montour County, Mahoning Township supervisors plan to keep offering teleconference and online options for public meetings, even after the public can again attend in person. "I think our attendance ended up being more online (than previous in-person attendance)," Township Secretary Carolyn Dragano said. "We've had a lot of people on. Not many on audio-video, mostly phone."

At the supervisors' first teleconference meeting, on March 23, 2020, right after COVID shut down most businesses and public buildings, 28 people, one supervisor and eight other township officials called in to the meeting. At the next regular meeting, about 100 people called in. Dragano said there was a lot of interest in the project to repair Bald Top Road at the time. Inperson meetings at East Buffalo Township's municipal building resumed in June. Capacity is limited to 25 people and social distance is maintained. Supervisors switched to virtual-only for all participants as a safety measure when the virus spread spiked earlier this winter. Zoom broadcasts have continued throughout the pandemic to expand public access.

**Stacey Kifolo,** township manager, said the virtual access adds a layer of convenience. Attendance online consistently bests in-person attendance, she said. "There have been no issues in meeting the maximum attendance in either the in-person or virtual formats. I think that future changes will be based on changes in attendance, in terms of preferred access. Personally, I think that the convenience of the virtual format is appealing to a wide-ranging demographic and has the potential to engage more residents in the local government process," **Kifolo** said.

Mahoning supervisors also have offered attendance options through Skype, which the supervisors have replaced with Microsoft Teams. Remote attendance has leveled off to just under 20 people and, more recently, about a dozen. That's still more than the eight to 12 who previously attended in-person meetings just prior to the pandemic. "I think we do better online because people can listen in their car on the way home," Dragano said. She said they can listen to a discussion of a particular issue then hang up, if they want, and not be embarrassed leaving in the middle of a meeting. "Having this has actually been good for us," she added. "I know for sure they will continue."

#### Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

Daily Item, The (Sunbury, PA) February 23, 2021

#### EBT solicits applications for township manager job

Author: Eric Scicchitano

East Buffalo Township Board of Supervisors seeks applications for the township manager position. Current manager **Stacey Kifolo** declined to comment on whether she'll reapply or is planning to leave the position. Her contract expires at year's end.

**Kifolo** served in the role since November 2012 and after a brief exit, resumed full-time duties in March 2019 when her replacement, Jamie Shrawder, resigned four months into her own tenure. **Kifolo** has worked remotely from Florida since taking back the position.

That last part is a driving factor for Supervisors Char Gray, board chair, and Jim Knight in seeking local candidates. Both supervisors said opening the position isn't about **Kifolo's** job performance. Both said she's done well. "I've heard a lot of comments from folks in the community about having someone who's physically here. I understand that concern. That would be the ideal situation: find someone with the kind of qualifications **Stacey** has who's local, lives in the community, or is willing to move here," Knight said.

"I do think it would be beneficial or ideal to have someone from the community," Gray said. "We'll float the job position out there and see what we can get. Given the amount of people we saw last time, I think we'll get a lot of resumes." When township supervisors first sought applications, 28 were returned in summer 2018 and 27 more were received when the position reopened in February 2019, according to Gray.

Supervisor Matt Schumacher encourages **Kifolo** to reapply. He said the distance from Florida to Pennsylvania in terms of **Kifolo**'s job performance is hardly noticeable, something Gray agreed with. However, he said he's following the lead of Gray and Knight. "My preference is that **Stacey** would get an extended contract. It's rare that we're going to find someone with the skill set **Stacey** already has. She is the main reason during my term we haven't had to raise taxes," said Schumacher, who is in the last year of a six-year term and hasn't decided himself if he'll seek reelection.

The Board of Supervisors met for a work session Monday and decided to advertise the position at the following places: Zip Recruiter, Glass Door, Indeed, Pennsylvania State Association of Township Supervisors, Association for Pennsylvania Municipal Managers, Pennsylvania CareerLink and the township's own website and Facebook page. The deadline for applications is March 31. All three supervisors expect the salary to be set commensurate with a successful candidate's experience. Gray estimated the starting salary from \$60,000 to \$80,000. **Kifolo**'s salary in 2021 is budgeted at \$89,000.

#### Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **Stacey Kifolo** is listed below.]

Daily Item, The (Sunbury, PA) February 22, 2021

#### Valley budgets, street crews stretched thin by winter weather

Author: Eric Scicchitano

The harsh winter is taking a toll on municipal budget and street crews who have been working overtime to keep Valley roads and streets clear during the recent crush of winter storms. **Stacey Kifolo**, manager of East Buffalo Township, estimated the township used 100 tons each of salt and aggregate road material in winter 2019-20. This year, she estimates they've used from 3 to 4 times those amounts.

Another way to look at road maintenance during winter storms is fuel use. According to **Kifolo**, the snowstorm from Dec. 16-17 that dumped an estimated 18 inches on the greater Lewisburg area saw the township road crews use nearly 550 gallons of diesel fuel to operate their trucks and plows.

**Kifolo** added that staff overtime in 2021 likely already surpassed all of 2020. "The overlooked toll is on the crews. The stress on the mind and body. The out-of-the-ordinary shifts that require the guys to be fully alert when they would otherwise be getting their body's needed sleep. They are out there when so many others wouldn't even dare. My guys don't get the level of appreciation they deserve for clearing roads so that people can get to work and emergency vehicles can get to people," **Kifolo** said.

Lewisburg Borough has used 321.45 tons of rock salt for its roadways this winter so far compared to 217.02 all of last winter, according to Borough Manager William Lowthert. Lowthert noted that most of the winter weather in 2019-20 was ice and sleet whereas in 2020-21 it's largely snow.

The borough spent a combined \$28,239 on winter maintenance: road salt, ice melt for sidewalks in public parks, parking lots and borough-owned property and employee labor. This year, the tally is \$81,383 and climbing. The major additional expense is third-party clearing and hauling of snow from parking lanes along borough streets: \$24,414. Last year, the borough didn't have to expend a dime since there wasn't nearly the amount of snowfall. Employee overtime is up, too. Regular time and overtime combined cost \$8,850 last winter compared to \$5,958 for regular time and \$18,887 for overtime this year so far, Lowthert said.

Daily Item reporters Marcia Moore and Justin Strawser contributed to this story.

#### Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

Daily Item, The (Sunbury, PA) February 19, 2021

**UPDATE Township manager: Snow plow on truck likely spared driver from serious injury** Author: Francis Scarcella

An East Buffalo Township plow truck driver escaped serious injury after an accident at the Bucknell University entrance on Route 15 Friday. According to **Stacey Kifolo**, East Buffalo Township manager, the township plow truck driver was traveling eastbound across State Route 15 from Smoketown Road to Moore Avenue around 11 a.m.

A tractor-trailer carrying vehicles was traveling northbound on State Route 15 and due to the traffic signal being in flash operation because of inclement weather it allowed the right-of-way to State Route 15 traffic, **Kifolo** said.

**Kifolo** did not give a condition on the truck driver. "It was the snowplow on the township truck that likely saved our driver or at least prevented serious injury," she said. "The plow was the only thing that prevented the driver side of the truck cab from slamming into the pavement when the truck rolled to its side. Ironically, it appears that the plow will be the only thing that will go back into service." **Kifolo** said the township was grateful for the calls received from concerned residents.

Lane restrictions along Route 15 stayed in place for nearly an hour but traffic was able to slowly work through the northbound lane of Route 15, but the entrance to Bucknell University remained closed while emergency responders cleared the scene.

A representative from the Buffalo Valley Regional Police said he was unsure if there would be a report on the incident on Friday night.

#### Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

Daily Item, The (Sunbury, PA) December 14, 2020

#### EBT supervisors adopt budget, give emergency funds to BVRA

Author: Eric Scicchitano

East Buffalo Township Supervisors adopted a final 2021 operating budget, briefly updated the public on the status of a pending lawsuit initiated by Lewisburg Borough and cast a split vote to provide \$42,000 in emergency funds to Buffalo Valley Recreation Authority. The final budget projects \$4,450,636 in revenue and \$4,932,013 in expenses. The resulting deficit will be covered by the township's existing fund balance. Supervisors Matt Schumacher, board chair, Char Gray and Jim Knight authorized the budget during a public meeting Monday.

Township Manager **Stacey Kifolo** explained that projects like road construction that was delayed in 2020 due to the coronavirus has pushed into 2021. It's reflected in the expenses but the funding to pay for the projects is in the current year's budget and will roll over into next year.

The final property tax millage rates dipped slightly from what had been planned. The street light tax and fire hydrant tax were reduced by 0.02 mills to 0.05 and 0.06, respectively. Property owners subject to the fire hydrant tax — a property within 780 feet of a hydrant — will be taxed at a rate of 4.56 mills, down from 4.6 mills. Those not subject to the hydrant tax will be taxed at 4.50 mills, down from 4.52. A rate of 4.56 mills is equivalent to \$4.56 taxed on each \$1,000 of a property's assessed value.

#### Meeting request unanswered

East Buffalo Township's request to Lewisburg to meet to review and revise the joint contract governing the Buffalo Valley Regional Police Department went unanswered, according to **Kifolo.** The borough and township are locked in a lawsuit concerning municipal funding of the police department's operations. The borough looks to maintain a 52-48 percent funding split with the township paying the greater amount. The township moved in 2017 to reduce its contribution to about 50 percent and maintains contract language allows member municipalities to request a specific amount of coverage rather than following a formula used for the department's first budget when it was created in 2011.

In November, township supervisors proposed the meetings in a letter to Lewisburg Borough Council. Should that be declined, they suggested either municipality take sole ownership of the department and sell coverage to the other. The supervisors moved Monday night to pay \$92,339.83 monthly for its funding contribution in 2021, which is the 2020 rate. The township previously rejected the department budget since it reflects a 52-48 percent split. As a result, **Kifolo** said the department must work from its 2020 budget until the 2021 version is resolved.

Township resident Joan Moreau suggested the supervisors hold the disputed 2 percent shortfall in escrow. Another resident, Margaret Marr, criticized the supervisors for their "unilateral" decision in 2017, saying it spurred the lawsuit. She suggested the township pay the disputed

#### Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

funds, previously estimated at about \$40,000 annually. Schumacher maintained the township is acting in accord with the existing agreement and that it's up to the borough to drop its lawsuit and negotiate. He estimated the township spent \$85,000 in legal fees so far. "We'll definitely be over \$200,000 wasted by the time this thing goes to trial," Schumacher said. There's a pre-trial conference in the case on Dec. 29. A trial is expected to be scheduled in Union County in the first quarter of 2021.

The supervisors voted 2-1 to provide an additional \$42,000 in funding to Buffalo Valley Recreation Authority. Gray and Knight voted in favor. Schumacher dissented saying he wasn't willing to exceed the additional \$25,000 Lewisburg authorized. The authority is struggling to make ends meet as its programming has largely been shut down due to coronavirus restrictions.

BVRA operates partially on municipal contributions. East Buffalo Township provided \$120,719 in 2020 while Lewisburg provided \$67,598.46. The amounts are based on direct terms between the authority and the individual municipalities. Kelly Township is also an authority member but chooses not to contribute financially.

All three supervisors voted in September to allow **Kifolo** to cut \$8,000 checks monthly on request by BVRA. The monthly requests weren't made. The authority's executive director, Shirley Brough, made a one-time request of both the township and Lewisburg. The borough voted previously to give the authority \$25,000 in additional funds.

The authority's governing board, which includes Gray as a member along with additional township and borough representatives, dictated the request along the lines of the municipal funding split: 2/3 from the township, 1/3 from the borough, roughly. Schumacher argued that wasn't a fair split. The funds are to maintain the organization as its revenue disappears. He said the split should be equal since it's beyond normal budgeting. "Are we not equal participants in keeping BVRA afloat?" Schumacher asked. "This isn't about programming, this is about making it whole until we start programming again."

Gray said the entire funding model for BVRA should be reviewed. She pointed to the swimming pool which annually loses money. She said she'd support additional money for BVRA to keep the pool viable in the future. "The pool can't support itself. I think as a community we want a pool and I think we're gonna need two municipalities to fund more than we have to keep the pool running," Gray said.

#### Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

Daily Item, The (Sunbury, PA) December 7, 2020

#### Some Valley municipalities see tax hikes, some balanced

Author: Eric Scicchitano

When COVID-19 struck earlier this year, Valley municipal leaders feared the longterm impact on budgets. As 2020 nears its close, it is a mixed bag as elected officials finalize 2021 spending plans. Some entities are holding the line on taxes, some are seeing slight increases and one municipality actually refunded some money.

The Brookings Institute, a nonprofit public policy organization said the financial hit could last beyond this year. Their projections estimate "state and local government revenues will decline \$155 billion in 2020, \$167 billion in 2021, and \$145 billion in 2022—about 5.5 percent, 5.7 percent, and 4.7 percent, respectively."

So far locally, most local municipalities seem to have fared OK. In Northumberland County, commissioners were able to approve a tentative budget thanks to across-the-board reductions. The group reduced each of the county's 52 department budgets by an average of 4 percent. The tentative \$82.9 million won't increase taxes on residents. "We had to meet a few times to work out the reductions with department heads," chairman Sam Schiccatano. "The department heads found ways to help us balance the budget without raising taxes."

Northumberland Borough officials approved a slight increase to help cover the costs of COVID and some stormwater issues. Their tax increase was proactive, council members said. "The borough is in pretty good shape in spite of COVID," said Councilwoman Ellie Rees. "It's something of a cushion and for stormwater issues. We thought it would be best to raise taxes a half-mill so we don't get in a predicament."

#### Slight reduction

East Buffalo Township Supervisors adopted a tentative budget last month with a final version expected to be approved Dec. 14. There is no tax increase. In fact, supervisors are discussing a slight reduction in the property tax millage rate. According to the preliminary plan, the township plans for \$4,451,236 in revenue and \$4,934,691 in expenses in 2021. The resulting deficit will be covered by the township's existing fund balance. That fund would drop to \$3,057,742 after clearing the deficit.

**Stacey Kifolo**, township manager, had repeatedly cautioned supervisors about a potential drop in revenue, especially next year, while discussing finances during the summer. At the time, the supervisors were considering a 20-percent property tax rebate on 2020 bills that ultimately was approved. As this year played out, **Kifolo** grew less anxious about financials in the upcoming year. "When this first started and everybody was shutting down," **Kifolo** said of the pandemic, "there was great concern with what was happening to people with their employment. I know I was bracing the board." However, **Kifolo** said earned income taxes and local services taxes

#### Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

weren't significantly impacted. While new home construction slowed, the township saw an increase in permits for small projects like sheds, decks and pools.

The rebates did return \$360,000 to taxpayers that would have been used for municipal business and projects. Some projects that couldn't be completed in 2020 due to pandemic complications were pushed into 2021, which raised the expenditures in next year's budget but are covered with existing funds to be rolled over, **Kifolo** said.

#### Road work implications

**Kifolo** anticipates less money from the state, called liquid fuels funds, for road work. She's not alone. William Lowthert, Lewisburg borough manager, said the anticipated reduction caused borough council to push street construction projects planned for 2021 into 2022. The state monies are often supplemented with local funds and Lowthert said the burden would be too large for the municipality to cover next year.

Lewisburg Borough Council adopted its 2021 final budget without a tax hike. It totals \$6,579,646.51 across 19 separate fund accounts including \$4,017,782.23 for the borough's general fund. "We're definitely concerned about the business privilege tax," Lowthert said. "We kept it level in the budget. That may not end up reaching budgeted expenses."

In Washingtonville Borough in Montour County, property owners will face a 50 percent tax increase next year to help fund road maintenance. Mayor Tyler Dombroski said the borough's state liquid fuels allocation is going to be less in 2021 because of the pandemic. "The main reason for the increase is road maintenance," Dombroski said. "We just paved one block of alley which came out to about \$6,000." Dombroski said \$6,000 "is a drop in the bucket to address our streets.

#### Watching expenses

In Lewisburg, A tax is collected on businesses' gross receipts at a rate of 75 cents on every \$1,000 generated, according to borough ordinance. The borough budgeted a collection of \$125,000 next year, about 5 percent of anticipated tax revenue.

The borough has been planning for a \$1.6 million project in 2021 to improve the Bull Run floodplain, create a nature play area at Hufnagle Park and expand the Buffalo Valley Rail Trail to the edge of Bucknell University's campus. That's still on and is largely funded with government grant funds, though an undetermined local match will be needed. Contractor bids are expected to be received early next year. "We're definitely watching taxes and expenses, especially with the big project we know will happen next year," Lowthert said.

Mifflinburg's tentative budget estimates \$2,451,400 in revenue compared to \$2,449,360 in expenses. Tax rates are anticipated to remain the same when the borough council votes on a final version later this month. There are, however, planned increases to the borough-owned utility services: 3 percent for sewer and 1 percent for water. Electric rates aren't planned to rise.

#### Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

Margaret Metzger, borough manager, said the borough works with residents who are late on utility payments. Metzger said the pandemic could cause a dip in earned income taxes and local services taxes but the potential impact is truly unknown. "I don't have a crystal ball," Metzger said. "I wish I did. It's unfortunate, but we kind of have to roll with things."

Taxes in Shamokin Dam Borough are projected to rise by 1 mill under the proposed \$891,344 2021 budget. While health coverage costs are down by 14 percent, Borough Manager Ed Hovenstine, said other areas of the spending plan are increasing, including salaries and benefits.

The police budget includes salary raises of \$4,000 for the chief and two patrolmen, which were approved in the 2018 contract. The public safety budget is proposed to increase from \$400,738 this year to \$422,996 in 2021, an increase of 5.6 percent, Hovenstine said. There is no planned increase in water or sewer costs. "We haven't had an increase since 2015," he said. The proposed budget represents a 3.6 percent increase over the 2020 budget of \$860,400 and will be up for a vote on Dec. 7.

#### No increases

The Monroe Township Supervisors are scheduled to adopt the municipality's proposed \$2.9 million spending plan for 2021 on Dec. 22. The budget carries no tax increase and is up from the current budget of \$2.78 million, township secretary Stephanie McKinney said.

In Danville, borough taxpayers can expect to pay the same tax rates next year — the first time in eight years — under a preliminary budget borough council passed last month.

Sunbury's city council approved its \$.5 million budget with no increase because of a \$211,000 carryover, according to Kevin Troup.

Daily Item reporters Marcia Moore, Francis Scarcella, Eric Scicchitano, Joe Sylvester and Justin Strawser contributed to this story.

#### Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

Daily Item, The (Sunbury, PA) October 13, 2020

#### EBT chair suggests leaving regional police if Lewisburg continues lawsuit

Author: Eric Scicchitano

Note: This story has been updated to correct a comment made by Supervisor Jim Knight and also clarify the reference to a funding formula.

Citing mounting legal costs of an ongoing lawsuit brought by neighboring Lewisburg, East Buffalo Township's supervisor chair suggested the board pursue a new arrangement for ownership of the Buffalo Valley Regional Police Department or consider withdrawing altogether. Supervisor Matt Schumacher estimated the township compiled \$56,000 in legal bills as of Monday. That cost stands to rise as fees for upward of 30 hours of depositions plus charges from township Solicitor Peter Matson haven't yet been calculated.

Schumacher posited that Lewisburg, which filed suit in June 2019 against the township and the regional police commission, spent at least roughly the same amount. "For what? There will be no winner," Schumacher said, with Supervisor Char Gray later pointing out that both sides would have to negotiate contract terms regardless of how the court might rule on the funding aspect. "I agree, this is a lot of wasted money," Gray said.

As a result, Schumacher suggested the township board make a decision before the end of 2020: make a change where either municipality takes on full ownership of the department and sells coverage to the other entity, or the township pulls out of the regional department and funds its own operation. Moving before year's end would allow the two sides to negotiate before potentially terminating membership in the regional department at the close of 2021, Schumacher said. That is if the borough doesn't drop the lawsuit and negotiate new funding terms directly with the township. "East Buffalo Township on its own can offer equal if not better police services to our citizens and we should do so as that's our job as elected officials," Schumacher said.

Supervisor Jim Knight said he wants to see the regional department continue. At Gray's suggestion of exploring information on alternative funding models with Chief Paul Yost, Knight said that "sounds OK to me." "It's unfortunate we're in this position. I thought we have offered a couple of times to sit down and talk with them," Knight said.

Judy Wagner, Lewisburg mayor and a police commission member, said if the township were to exit the move would be like "throwing the baby out with the bathwater." "If the regional police force dissolves, each one of us individually would pay more to start up our own police," Wagner said Monday night in response to the township supervisors' comments. "You would never have the level of service and professionalism that we do now."

#### Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

At issue are municipal funding and the contract language that dictates how municipal contributions should be determined. The borough seeks to maintain a 52-48 split, with the township paying the larger portion. The township holds that it's up to either municipality to request a specific amount of coverage — which could push a contribution higher or lower — rather than a percentage split.

The township and borough have been on opposite sides of the issue since roughly 2016 and at the end of that year, the township board chose to request a set amount of police coverage rather than stick to the prior 52-48 allotment. In doing so, the township cited contract language it interprets as allowing a specific request. The borough disputes the interpretation and filed the lawsuit last year asking a judge to uphold the 52-48 split.

A funding formula was used to determine municipal obligations as the department was being created, Mayor Judy Wagner confirmed. At a December 2016 meeting of municipal representatives from both sides, it was explained that the formula utilized population density, assessed taxable property values, incidents of crime and amount of road miles to be covered. That formula isn't included in the contract between the municipalities, known as an intergovernmental agreement.

The two sides met for joint work sessions a handful of times several years ago but those sessions have stopped. The township has floated a 51-49 split as a compromise but the offer didn't go anywhere. Late last year, township Manager **Stacey Kifolo** reminded that the township offered a draft agreement to restart negotiations with Lewisburg but that the borough didn't move to discuss terms.

Despite the tumult between the two municipalities, Schumacher said the regional police department continues normal operations and has consistently remained under budget without jeopardizing coverage.

Lewisburg Borough Council meets for a work session tonight and a voting meeting next Tuesday. The police commission meets Wednesday.

#### Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

Daily Item, The (Sunbury, PA) September 14, 2020

#### EBT agrees to help BVRA through financial woes

Author: Eric Scicchitano

East Buffalo Township supervisors pledged to provide financial assistance to the Buffalo Valley Recreation Authority as the organization struggles to generate revenue during the pandemic. The Authority, known as BVRA, faces an estimated \$80,000 shortfall by year's end as programming and participation are restricted due to government mitigation measures, BVRA Executive Director Shirley Brough said during Monday's supervisors meeting.

Supervisors Char Gray, Jim Knight and Matt Schumacher all voted to authorize township Manager **Stacey Kifolo** to cut checks of up to \$8,000 between meetings through year's end. The move allows faster action rather than waiting for a formal board vote. Additional funds could be authorized by the board at its meetings. "We're not going to let this thing fold. It's an asset to the community," Schumacher said. "We just have to get the gym back and we should be in good shape," Brough said, referring to the hugely popular gymnastics program.

The program is a major revenue driver, about \$486,000 was budgeted in revenue for 2020, but participation is restricted due to limits on social gatherings. According to Brough, when gymnastics operations halted in March the program credited \$62,000 in dues already paid by participants. Two-thirds of that amount has yet to be used. She said gym operations resumed but at 33 percent capacity.

Because BVRA is a municipal authority, it wasn't eligible for coronavirus relief funding like the Paycheck Protection Program or Union County's own grant program, Brough said. Brough said she's pursuing private grant funding opportunities and expects to hear on at least one application next week.

**Kifolo** said she questioned Union County Commissioners why that board couldn't help the authority. The county's grant program restricts help to specific nonprofit designations and BVRA doesn't qualify. "I asked specifically if there was anything that East Buffalo Township could do to help the authority. I have not heard from them," **Kifolo** said, referring specifically to funneling federal virus relief funding to the authority through the county and township, which she said is an allowable use of the federal money. The township and BVRA will stay in communication to fulfill financial needs. Brough estimated BVRA has enough cash currently to make it to mid-October.

Brough said social distancing mandates forced reduced access not only to the gym but also to programs like summer camp. BVRA opted against opening its pool this summer, which operates at a \$50,000 loss, though it incurred about \$25,000 in maintenance and repairs when a water line feeding the pool broke. The pool remained closed because the gym revenue wasn't at normal levels to offset the losses. BVRA continues to pay \$10,000 monthly to the operators of the

# **Section 5**

#### Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

GreenSpace Center in Lewisburg where its offices and gym are located. Brough said she was denied a deferral. Schumacher suggested she again raise the issue with the building owners since BVRA's barely used the space the past six months.

BVRA operates partially on municipal contributions. East Buffalo Township provided \$120,719 in 2020 while Lewisburg provided \$67,598.46. The amounts are based on direct terms between the authority and the individual municipalities. Kelly Township is also an authority member but chooses not to contribute financially.

Gray, an East Buffalo Township representative to the BVRA board, said representatives appointed by Lewisburg Borough Council anticipated a similar request for financial assistance. "In our board meetings, the borough members on the board basically said the same thing. I don't think there's going to be any questions about whether the borough will step up. They will," Gray said. Lewisburg Borough Council meets at 7 p.m. today.

#### Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

Daily Item, The (Sunbury, PA) June 8, 2020

#### EBT approves tax rebates for property owners

Author: Eric Scicchitano

East Buffalo Township Supervisors voted to approve 20-percent tax rebates for township property owners. The average rebate is \$140 and the total cost to the township will exceed \$409,000, township Manager **Stacey Kifolo** said during Monday's board meeting. The rebates are meant to aid township residents through the economic fallout of the global coronavirus pandemic. The average is skewed, **Kifolo** explained, by high-end property values such as GIANT Foods, which could receive about \$9,000 back.

Funds for the rebates will come from the township's reserve account. Residents must make a formal request in writing no later than Dec. 15. Taxes must be paid in full prior to Dec. 31. **Kifolo** said rebate forms should be mailed by July.

Supervisors Char Gray, Jim Knight and Matt Schumacher voted unanimously. "It's not our money, it's taxpayers money," said Schumacher, who credited **Kifolo**'s management with building a large reserve account to allow such a move. "Part of the reason we have a reserve is emergency purposes," Gray said, citing the spread of COVID-19. "I think this would be a good use of some of our reserves."

Knight expressed concern about the township's own projected loss of revenue. **Kifolo** estimated in April that the township could lose at least \$1.14 million across general fund revenue sources. The rebate funds did not, however, come from the general fund. "You have to weigh those two things against one another," Knight said, speaking of the projected deficit and existing reserve funds.

On Monday, **Kifolo** cautioned again that the revenue projections are unknown. She cited comments from earlier in the meeting by Gray that the Buffalo Valley Recreation Authority, to which the township contributes tax dollars, anticipates its own shortfall and could request additional funds before the year ends. Schumacher suggested the recreation authority seek private donations before making a request for more public funds.

#### Solar ordinance

Supervisors authorized Solicitor Pete Matson to advertise a public hearing July 13 before the township board on a pending solar ordinance. After months of review, the board settled on an ordinance proposal that is available for public review at www.ebtwp.org and also at the township building, 589 Fairground Road. The ordinance sets rules for solar energy systems in agricultural-preservation, agricultural-residential, Bucknell University and industrial zoning districts. The systems aren't permitted in other zoning districts. The ordinance allows from 5 to 50 acres of development in the first three zones, dependent on lot size and existing structures. Industrial

# **Section 5**

#### Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

zones don't have a maximum land amount for solar energy development but are capped at 90 percent of a lot's size not used for structures, driveways, etc.

Lawsuit

Oral arguments are scheduled for June 22 in the lawsuit brought by Lewisburg Borough against the township and the Buffalo Valley Police Commission. The arguments are about the township's motion for summary judgment asking a judge to toss the lawsuit and mandate the existing agreement between the three entities be enforced as written. **Kifolo** said a judge's ruling isn't expected immediately after the oral arguments end.

Lewisburg Borough filed suit in February 2019 against East Buffalo Township and the Buffalo Valley Regional Police Commission, a governing body consisting of members of both municipalities. At issue is municipal funding. The borough seeks to maintain a 52-48 split, with the township paying the larger portion. The township holds that it's up to either municipality to request a specific amount of coverage — which could push a contribution higher or lower — rather than a percentage split.

Asked by Schumacher, **Kifolo** estimated the township spent \$35,000 on attorney fees on the lawsuit so far. "That money could have been used at (Buffalo Valley Recreation Authority)," Schumacher said.

# **Section 5**

#### Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

Daily Item, The (Sunbury, PA) May 5, 2020

#### EBT, Lewisburg announce phased resumption of normal operations

Author: Eric Scicchitano

East Buffalo Township began a staggered redeployment of employees on Monday, while Lewisburg Borough aims to begin its own staged plan starting May 11. Lewisburg targets a full return to normal operations in early June depending on state restrictions, according to Borough Manager William Lowthert.

Lewisburg will lift its 10-person limit at social gatherings beginning at 12:01 a.m. Friday, Lowthert said. He said the borough will enforce the governor's gathering limits moving forward.

East Buffalo Township is working to acclimate employees to on-the-job social distancing, according to Township Manager **Stacey Kifolo**. Individual employees are asked to give input on identify potential changes that should be made before the full work crew is fully operational.

## Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

Daily Item, The (Sunbury, PA) April 27, 2020

### UPDATE: EBT facing \$1.14 million revenue loss, still considering tax rebate

Author: Eric Scicchitano

Note: The combined estimated revenue shortfall in East Buffalo Township is \$1.14 million. This figure was incorrect in an earlier version of this story.

East Buffalo Township Supervisors plan to vote next month on a potential tax rebate for property owners as a way to help residents during the novel coronavirus pandemic. The forecast that the township stands to lose an estimated \$1.14 million combined across general fund revenue sources didn't derail the idea as a vote is expected May 11.

Supervisors met Monday remotely and further discussed a 20 percent rebate. Township Manager **Stacey Kifolo** recalculated the estimate at that percentage, finding the move would cost \$365,000. That's down from \$392,000 after including the 2 percent discount received by the earliest of taxpayers. The percentage, for now, serves only as a placeholder. Supervisor Chair Matt Schumacher first floated the concept earlier this month.

The board directed **Kifolo** to draft a mailer that if the rebate is approved, would be sent notifying all property owners of the rebate and an as-yet-unspecified December deadline to submit a written request for cash back. The rebate wouldn't be automatically distributed. "I guess I don't envision many people saying 'no' and I'm wondering why we'd go through that extra step. I would ask for my money back if everybody else is," Supervisor Char Gray said.

Schumacher said some property owners may be in a position to either choose not to seek a rebate, perhaps out of civic duty or financial stability. Others may welcome cash back, he said, citing small business owners who may be struggling. "If we talk about people being hurt and there being so many unknowns, don't you think the people's pockets are the best place for the money to be?" Schumacher asked.

Supervisor Jim Knight already said he wouldn't seek a rebate. Schumacher has taken a wait-and-see approach. The township board reduced property taxes by 10 percent entering 2020.

**Kifolo** calculated revenue losses from earned income tax (\$332,000), local services tax (\$52,000), real estate transfer tax (\$87,000), development and construction fees (\$33,000), interest (\$27,000), extension of the real estate tax discount period (\$5,000) and real estate tax (\$365,000).

Gray asked **Kifolo** if her estimates are particularly conservative. The current pandemic — and ensuing fiscal crisis — brings about too many unknowns to say, **Kifolo** replied. She added that should Bucknell not resume in-person courses this fall, potential losses would intensify. Supervisors agreed to recommend that Union County, which sought municipal input, eliminate

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# **Section 5**

## Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

penalties for late payment of property taxes in 2020. An emergency law adopted by the state allows municipalities to extend discount periods and eliminate penalties. The township board seemed to agree that the accounting issues with extending discounts — the discount period ended last month — could create an undue burden. The county serves as the township's tax collector. Bills were already sent out and 83 percent have been paid.

Lewisburg Borough Council voted earlier this month to adjust its tax payment periods in line with whatever decision the county commissioners ultimately make.

Supervisors voted to extend the current disaster declaration until May 8, the tentative date set by the Gov. Wolf Administration to ease stay-at-home and business closure orders in lesser-impacted parts of Pennsylvania. **Kifolo** said like the state, the township would take a staggered approach to recall employees and resuming routine business.

## Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **Stacey Kifolo** is listed below.]

Daily Item, The (Sunbury, PA) March 19, 2020

### **UPDATE:** Northumberland commissioners declare disaster emergency

Author: Staff Writer

East Buffalo Township declared a disaster emergency Thursday in response to the novel coronavirus COVID-19. The declaration is done in under state law and in cooperation with Union County Emergency Management.

"Although enacted in the past for snow and flood emergencies, a declaration by the township for a response to a pandemic is unprecedented. The township will maintain cooperation with Union County Emergency Management to monitor and respond as necessary throughout this situation," Township Manager **Stacey Kifolo** wrote in the announcement.

Township facilities remain closed to the general public. All meetings and gatherings are cancelled and the recycling collection is suspended until further notice.

## Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

Daily Item, The (Sunbury, PA) March 11, 2020

## Township, borough officials fail to reach agreement over police funding

Author: Staff Writer

Attempts to settle the police funding lawsuit out of court failed as litigation continues between East Buffalo Township Supervisors and Lewisburg Borough Council, according to a statement from township officials. "There is no plan for negotiation of a revised intergovernmental agreement," Township Manager **Stacey Kifolo** said, quoting an official statement from the Board of Supervisors. "The borough is moving forward with litigation with the next step being a costly litigation process."

Citing the statement, **Kifolo** said the borough in February rejected an offer to negotiate using a township-created draft agreement as a starting point. The offer initially was made in November and reiterated through followup communications between the respective attorneys on the lawsuit, **Kifolo** said. The statement was to be read during Monday's township supervisors meeting. However, a lengthy discussion on a proposed solar energy ordinance prevented the reading, **Kifolo** said.

Lewisburg Borough filed suit in February 2019 against East Buffalo Township and the Buffalo Valley Regional Police Commission, a governing body consisting of members of both municipalities.

Attorneys for both municipalities indicated in court documents earlier this year that they were pursuing a settlement. As a result, a judicial order moved back the bench trial to the third quarter of 2020 and also delayed deadlines for discovery evidence and pretrial.

At issue is municipal funding. The borough seeks to maintain a 52-48 split, with the township paying the larger portion. The township holds that it's up to either municipality to request a specific amount of coverage — which could push a contribution higher or lower — rather than a percentage split.

## Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

Daily Item, The (Sunbury, PA) March 11, 2020

### Supervisors award park project design, management to York firm

Author: Eric Scicchitano

East Buffalo Township Supervisors voted Monday to award contracts for the design and management of a park project on Fairground Road as well as traffic signal and speed enforcement projects along Route 15 and Route 45.

YSM Landscape Architects, York, is contracted to complete final designs, prepare construction documents and oversee project inspection. The contract value is not to exceed \$68,700. The firm previously had been contracted to develop a master site plan for the public park next to the municipal building.

The township received \$225,000 in state grants and budgeted \$250,000 to matching funds. Construction isn't expected until 2021.

Herr Signal and Lighting Inc., Grantville, was awarded separate contracts. One contract is to replace the traffic signal at Route 15 and Moore Avenue, the main entrance to Bucknell University. In partnership with Union Township, the signal on Route 15 at Winfield will be upgraded. East Buffalo Township received \$372,179 and must match \$93,044.75.

Herr also is contracted to replace reduced speed zone signals on Route 45 near Linntown Intermediate School and make some upgrades at the Fairground Road intersection. The township received \$77,549.64 from the state and must match \$2,500.

Township Manager **Stacey Kifolo**, who provided the grant funding information, said both traffic projects are under budget by approximately a combined \$116,000.

## Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

Meadville Tribune, The (PA) February 12, 2020

### Support, opposition to gun sanctuary rule

Author: Eric Scicchitano

A standing room-only crowd filled the community hall at the East Buffalo Township Municipal Building on Monday as dozens of people expressed support or opposition for a suggested ordinance creating Second Amendment Sanctuary municipalities. The ordinance rejects the enforcement of certain state or federal gun control laws and would restrict the use of local government resources to abide with the higher-government statutes.

By and large, supporters argued gun control measures restricting ownership for law-abiding citizens directly violates the right to bear arms granted by the Second Amendment of the U.S. Constitution. "I support the Second Amendment," was a refrain repeated often by the 100-person crowd's majority.

"I am a firearm owner and fully support the Second Amendment as well as the reasoning behind the ordinance," said Anne Sloan, a township resident. Acknowledging members of the Moms Demand Action in attendance, Sloan said the collective energy of the community should be used to address addiction, human trafficking and infrastructure. "I am not the problem. These men and women here are not the problem. The firearms they own are not the problem," Sloan said.

Those in opposition said the local government has no place in diverting from the rule of law established in state and federal courts but should it choose to do so, it could expose taxpayers to financial liabilities if the ordinance is challenged in court.

Moms Demand Action advocates for "commonsense" gun laws and not the abolition of gun ownership. Lauren Peck, a member of the local Moms contingent, told township supervisors the municipal body had no authority to reject gun laws. "The constitutionality of future gun laws will be determined by the courts," Peck said. "People like you," she told the board, "have an obligation to carry out that law, not defy it."

The first Second Amendment Sanctuary Ordinance (SASO) anywhere in the United States was passed last week in Buffalo Township, Union County, according to Val Finnell, Pennsylvania director, Gun Owners of America. Members of the Buffalo Township board attended Monday's meeting. Hundreds more communities nationwide have adopted SASO resolutions, which amounts to a symbolic gesture compared to the binding rules ordinances bring about.

A group of Union County residents including Shawn Waltman and Scott Henninger launched a local push aiming to have SASO adopted across the county. Henninger, a resident of East Buffalo Township, said gun ownership is "constantly under attack." He said there's value in lawabiding citizens legally owning firearms for protection. A former state trooper, Henninger said he's come to reject the term "first responder" for those in law enforcement. "I was always beat (to

## Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

a crime scene) by one or two people. One of those people was the victim," Henninger said, adding that he was once backed up by an armed citizen and remains thankful for it.

Leroy Fisher invited anyone curious about gun use and ownership to visit him at a local gun club for safe demonstration and information. "Gun-handling should start at home at a young age," Fisher said.

Those among the crowd who spoke out on the issue Monday were split. Supporters created a majority but those in opposition were also well-represented. It could hardly be used to measure support among township residents as attendees came from all over Union County — Lewisburg, Allenwood, Mifflinburg and beyond — and not just East Buffalo Township alone.

The supervisors devoted the first 80 minutes of the meeting for audience participation. The crowd heeded Chairman Matt Schumacher's request that they act civil, speak efficiently, avoid redundancy and steer clear of jeering or talking over others.

The governing body didn't act on the measure. They didn't discuss it or seek answers to questions. They simply allowed the audience to speak its mind. Further discussion by supervisors is expected at a public work session to be held at 5:30 p.m. Feb. 24 at the township municipal building, 589 Fairground Road.

Township Manager **Stacey Kifolo** said the matter couldn't be put to a vote by township residents as it doesn't meet specific criteria for a ballot question. "This municipal body has no authority to say whether or not a state or federal law is unconstitutional. The only way to make that happen is if the board decides to file suit against the state," **Kifolo** said.

## Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

Daily Item, The (Sunbury, PA) February 10, 2020

#### Township manager operates from Florida

Author: Eric Scicchitano

About 1,000 miles separate **Stacey Kifolo** from the headquarters of East Buffalo Township, the Union County municipality that she manages daily, but she said a typical workday doesn't feel any different from when she occupied an office in the township's municipal building. **Kifolo** works from her home in Florida. Telecommunications is paramount in completing her tasks and so is her familiarity with the Buffalo Valley. She grew up in the Lewisburg area. Without that experience, in a sense, she'd be working blind. "If she didn't know the township like she does, it wouldn't work," Jolene Helwig, administrative assistant, said.

**Kifolo**'s worked as the township manager since 2012. In fact, she's the township's first manager. Save for four months when Jamie Shrawder replaced **Kifolo** before resigning early last year, she's been the township's only manager, too.

The last 18 months have seen **Kifolo** serve as manager in some capacity remotely. She stayed on as an interim manager after relocating south, served as a consultant, of sorts, when Shrawder was hired and, eventually, accepted an offer to return to the position full-time last May. "I don't think she's missed a beat. I don't think we've missed a beat in the transition. For the most part, I don't think anybody would notice a difference," Supervisor Char Gray said. According to Gray, **Kifolo** remains an effective and prompt communicator with supervisors and staff via email and telephone. Documents are shared, annotated or updated using computer programs. Helwig said there's been maybe two instances of citizens visiting the office and asking to speak with **Kifolo** directly, a request fulfilled with Skype, an online video-chat service.

When **Kifolo** began her workdays while living in the township, she often started with a drive through the municipality to take a look around. That's an impossibility now. However, she said the distance between herself and the township has improved her ability to delineate tasks. "I had to learn better how to delegate," **Kifolo** said. "Obviously, it's been effective because I have good people working in the township." "It's all about trust," **Kifolo** said.

Working with vendors or government agents, say from Harrisburg, hasn't changed much. The communication was and is largely done online or on the phone, **Kifolo** said. She spoke to grant projects she's currently working on including a traffic light project. Documents are reviewed online and discussed using telecommunication tools, she said.

**Kifolo** said she's in frequent contact with Helwig and Steve Mohr, the public works director. There's a lot of back and forth with supervisors, too, she said. "One of the things I miss, and this might surprise them, I do miss seeing the crew," **Kifolo** said of township employees she doesn't have daily interaction with. Jim Knight has only worked with **Kifolo** from a supervisor's standpoint since taking office in early January. He said he's concerned about the lack of a

## Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

manager in the office, preferring face-to-face interaction for that position. However, he said his opinion isn't set in stone. "My opinion hasn't changed in that it's not an ideal situation," Knight said. "It's never been a reflection on **Stacey** or her capabilities. She's obviously very knowledgeable about how the township works. She's certainly very capable." "I'm open-minded about it. We'll see where we are in a year or two years," Knight said.

Schumacher said when **Kifolo** informed the board last spring that she'd be resigning as manager, he didn't want to hire someone living beyond the borders of East Buffalo Township let alone hiring someone out of state. The supervisors twice petitioned for applications. He said nearly 30 candidates were interviewed, some twice. The position was filled. Ultimately, it didn't work out.

That **Kifolo** remained working throughout that process showed Schumacher that with current technology, at least in **Kifolo**'s case, the township could be managed remotely. "She's exceptional. I would never want her job. She does so much and knows so much," Schumacher said. "Her productivity, her involvement, the product she puts out, the emails, the data, the charts — it's like she's still sitting there. The only thing not occurring is that she's not sitting in the building anymore," Schumacher said.

## Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

Daily Item, The (Sunbury, PA) December 17, 2019

#### East Buffalo Township supervisors formalize tax decrease

Author: Eric Scicchitano

East Buffalo Township Supervisors formally adopted a property tax decrease with the 2020 operating budget. Monday's final vote makes official a decrease that was preliminarily approved in November. Property tax rates fall to 4.6 mills next year, down from 5.11 mills levied in 2019. The new rate means property owners will spend \$460 on each \$100,000 of a property's assessed value.

Board Chairwoman Char Gray and fellow supervisors Matt Schumacher and Jim Murphy voted in favor. Monday's meeting was Murphy's last. He'll be replaced next month by his 2019 election opponent, Jim Knight, who will be the lone Democrat on the board. Murphy was thanked by Gray, Schumacher and members of the public for his service since he was appointed in June to the board.

Projected expenses are budgeted at \$4,727,806 compared to \$4,406,089 in revenue. The deficit will be erased with money from the township's reserve fund, estimated at \$3.5 million after the budget gap is eliminated. Township Manager **Stacey Kifolo** explained some minor changes were made to the budget in both expenses and revenues ahead of the final vote. There were slight decreases to revenue and slight increases to expenses including the planned expenditure of an additional \$28,352 to the regional police department.

The 2020 tax levy is as follows: general fund, 4.0 mills; fire fund, 0.45; fire hydrant and street light, 0.08 and 0.07, respectively. The hydrant tax is assessed only on taxable parcels located within 780 feet of a hydrant. For properties that fall outside a hydrant zone, the total tax millage is 4.52 mills.

## Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

Daily Item, The (Sunbury, PA) May 16, 2019

### Kifolo back full-time with East Buffalo Township, will work from Florida

Author: Eric Scicchitano

A familiar face returns to lead administrative duties of East Buffalo Township and this time, **Stacey Kifolo** will manage day-to-day operations from six states away. Township supervisors rehired **Kifolo** as a full-time employee after spending nearly a full year seeking her replacement. **Kifolo** announced her resignation last June.

**Kifolo** will work remotely from her home about 1,000 miles away in Florida, something township leaders grew accustomed to as she worked in a transitional role on contract following her official exit in August. "Our feeling is we've had the chance to test the waters with this arrangement over the past nine months. It's actually working quite well," Supervisor Chairperson Char Gray said.

The vote to rehire **Kifolo** came following a closed-door executive session Monday night. **Kifolo**'s salary is \$86,000, up from \$79,165 when she resigned. Gray said **Kifolo**'s hiring is effective immediately. **Kifolo** will use video conferencing, email and cellphone technology to communicate with supervisors, township employees, vendors and residents.

If someone visits the office and requests to speak directly, township secretary Jolene Helwig will connect them electronically using a webcam, **Kifolo** said. She said she'll return to the township occasionally on business when requested. "People come to the East Buffalo Township building and there they are on camera. They can see me and we can have a conversation," **Kifolo** said. "In this day and age of digital correspondence, it'll be as if **Stacey** was there in office every day," Supervisor David Rowe said. "From my role, it seems as if she never left. She's as available now as she was when she was residing a couple blocks from the township building."

Township supervisors thought they had **Kifolo**'s replacement. They hired Jamie Shrawder away from her job with Danville Borough. She began working in mid-October. **Kifolo** said the hiring allowed her to reduce her hourly work at the time. However, Shrawder resigned unexpectedly, exiting for a private-sector job Feb. 8. **Kifolo** said at that point, her hours picked up again. She estimated she worked anywhere from 20 hours to 60 hours within a biweekly pay period while on contract. The terms at the time were \$45 hourly with health benefits.

Supervisors received 27 resumes and interviewed an estimated six candidates following Shrawder's exit, Gray said. That's roughly the same experience they went through before choosing Shrawder, she added. Gray works in the field of mergers and acquisitions. She said she often works remotely. She cited it as a common practice in modern business. So did Rowe as well as Supervisor Matt Schumacher. "We weren't intending to do that. We went through two rounds of interviews. Hired one person. We went through two more rounds and interviewed

## Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

candidates. In the end, she's so good at her job, it's insane: What she knows, the money she saves us, the money she finds us," Schumacher said.

It's new ground for municipal government administration.

David Sanko, executive director, Pennsylvania State Association of Township Supervisors, said he's unaware of any townships in a situation similar to East Buffalo's. He said he didn't see any red flags and used it as a "great example" of local government creativity within the confines of the law. "It comes down to duties assigned and whether the elected supervisors are happy with the delivery. If you define expectations and meet expectations, everything's good," Sanko said. The office of state Rep. Dan Moul, R-91, chair of the House Local Government Committee, said nothing in the Second Class Township Code would prohibit an arrangement like East Buffalo's

**Kifolo** said she put off potential employment and business opportunities as she remained parttime. East Buffalo Township never had a township manager position before **Kifolo** was hired Nov. 1, 2012, to fill the newly created role. She said in this second go-around, she'll naturally have to delegate more duties, something she said she struggled with before.

## Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

Daily Item, The (Sunbury, PA) April 30, 2019

## Hotel proposal sparks potential flood map changes in Lewisburg, EBT

Author: Eric Scicchitano

Proposed changes to federal flood maps remove some properties from the 100-year flood zone north of St. Mary Street but add others in the area of North 10th Street, Route 192 and Route 15, according to preliminary mapping. The proposed updates are related to the pending hotel development at Penn Commons. Federal Emergency Management Agency would ultimately have to approve the changes. It's not clear how many property owners are impacted in East Buffalo Township and Lewisburg. Engineers from Mid-Penn Engineering will discuss the mapping proposal at a special public meeting 6:30 p.m. Thursday at borough hall, 55 S. Fifth St.

"If we're going to proceed with the project it's something that has to be done," said Matt Miller. Miller's True Story LLC seeks to construct a 107-room Fairfield Inn & Suites on undeveloped land near the nonprofit wellness center that bears his family's name at Penn House Commons off Route 15 in East Buffalo Township. "What we're doing isn't affecting the flood plain. The flood plain has been affected already by how Penn House Commons was built. What we put in there is not going to change the flood plain," Miller said.

Stacey Kifolo of East Buffalo Township said her understanding is that the Penn House Commons development didn't raise the base flood elevation. Retention areas added during that project improved flood protection, she said. Mid-Penn Engineering also worked the Penn House Commons development. Bud Schenck, project manager, referred all inquiries to Miller. East Buffalo Township had its own zoning manager at the time. Those services are now provided by Central Keystone Council of Government (CKCOG). "After some digging and discussions with CKCOG, it seems that it simply wasn't necessary to change the mapping. Everything was done properly for the facilities that were constructed on the existing site. It is only because of the type of structure now being proposed that is triggering a larger scale project. A retail store on the same site would not trigger the same needs," Kifolo said.

William Lowthert, borough manager, said property owners potentially impacted by the proposed flood mapping changes were notified by letter of Thursday's meeting. "They need (borough council) to sign off on flood plain maps as well before FEMA would consider it for adoption," Lowthert said.

While the Lewisburg Borough Flood Impact Task Force isn't involved in the flood map proposal, task force member Sam Pearson is intimately familiar with mapping and its implications. She said flood maps are "inherently imprecise." The flood maps proposed for changes were created before advancements in mapping technology now available, she said. "The part of the flood map that is the least certain is the line. We know where the center of the flood is. It gets less and less certain towards the edges," Pearson said. "The best way for property owners near those edges (both in and out) to know where they stand with respect to the floodplain is to have a Certificate

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# **Section 5**

## Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

of Elevation completed by a licensed surveyor. This could result in their being confirmed as being in the floodplain or evidence that in fact, they are not in the floodplain," Pearson said.

Property owners who may now find themselves in the flood plain may not experience a financial impact with respect to insurance if they don't have a federally backed mortgage, she said. However, it could impact the resale value for buyers needing to borrow funds.

## Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

Daily Item, The (Sunbury, PA) December 10, 2018

### No tax hike in 2019, but East Buffalo Township warns of future increases

Author: Eric Scicchitano

East Buffalo Township's taxes won't rise in 2019 but Supervisor Chairman Matthew Schumacher warned that residents in the township and throughout Union County could see increases in coming years due to tax assessment appeals on high-value structures. Six commercial or residential properties won appeals in 2018 reducing the total base of taxable property by an estimated \$12 million combined, according to information shared by Schumacher. That includes the R.R. Donnelley building in Linntown lowered to \$691,600 from \$2,447,700 and The Miller Center in Penn House Commons lowered to \$3,217,800 from \$12,031,100. The Donnelley figures were provided by Schumacher while the Miller figures were taken from a pending court appeal that, if successful, could lower the assessment even further. The Miller Center also was granted tax-exempt status by the county board of assessment appeals. Municipal, county and school district property taxes all are impacted when an existing property is reassessed at a lower value, either by the appeals board or the county court. Lowered assessments reduced the total amount of taxable property and generate less tax revenue. "This includes the county and school, not just East Buffalo Township. It's not going to help the citizens," Schumacher said.

"I've never seen anything that's had this much of a change in assessed value," **Stacey Kifolo** said via online conferencing. **Kifolo** is the former township manager and current consultant as new manager Jamie Shrawder transitions into the role. **Kifolo** attends meetings remotely.

Next year's budget was approved with minor revisions by Schumacher and fellow supervisors Char Gray and David Rowe. Revenue projects at \$4,427,629 compared to \$4,407,264 in expenses. The total property tax millage rate remains 5.11 — \$511 on each \$100,000 of a property's assessed value. The Buffalo Valley Regional Police Department budget was discussed in brief. Shrawder said she and Lewisburg Borough Manager William Lowthert spoke of a potential 51-49 percent split of the shared municipal funding obligation to the department. There's a feeling that the borough would agree to that figure in compromise over a two-year dispute about how much of the financial burden each municipality shares, Shrawder said. However, according to Shrawder, there may come a request by the borough for the township to make up the estimated \$80,000 shortfall that began in 2017 when the township unilaterally decided to fund the department at 50 percent rather than the 52-48 percent split called for in an existing intergovernmental agreement between the municipalities. Township supervisors didn't respond to that suggestion. According to the department's proposed 2019 budget, the township will contribute \$1,080,116 while the borough will contribute \$1,036,911. The total budget is \$2,160,232. Projected revenues stand 2 percent shy, or \$43,205, of the 100 percent combined funding obligation. Schumacher, a member of the police commission, said the topic would be discussed when the commission meets at 5 p.m. Wednesday at the police station. The budget could be finalized at the meeting.

## Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

Daily Item, The (Sunbury, PA) September 28, 2018

### EBT lost a valuable asset

Author: Michael Daniloff

East Buffalo Township residents are certainly aware by now that **Stacey Kifolo**, township manager for the past 6-plus years, resigned her position in August to pursue other challenges. As a former township supervisor, who had the good fortune of working alongside **Stacey** for a little over four years, I came to appreciate her highly impressive performance during that period.

**Stacey** broke new ground as EBT's chief administrative officer during her tenure. She structured much needed organizational changes which resulted in the township effectively operating in a more business-like fashion, rather than mainly as a political association.

Her financial skills were phenomenal, serving to bring expenses in line with available revenues. As a matter of fact, her budget plan for fiscal year 2018 proposed a zero increase in tax millage; yet, she was able to allocate monies to a standard capital reserve fund used to pave roadways and purchase major capital equipment such as trucks, plows, etc.

Additionally, she had the business savvy to develop a strategy to fund the underfunded liability of the township's post-retirement health benefits plan, which was set up in the past, but never adequately funded.

Under her leadership, **Stacey** organized the human resources piece of the operations, developing a salary program which includes, for the first time, performance as one of the factors determining salary increases.

My image of **Stacey Kifolo** is one of a management "superstar," someone who had the drive and desire to bring about significant change. Her overriding commitment at all times was to the tax-paying citizens residing in East Buffalo Township. And to that extent she served us well!

## Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

Daily Item, The (Sunbury, PA) August 14, 2018

### East Buffalo manager staying on part-time

Author: Joe Sylvester

Tuesday may have been **Stacey Kifolo**'s last official day as East Buffalo Township manager, but she won't be completely out of the picture. The supervisors announced on Monday following an executive session that they reached an agreement with **Kifolo** to continue as a part-time employee at \$45 an hour, working remotely from Florida, where she will be living.

Supervisor Chairman Matt Schumacher said that will allow for continuity as the township searches for **Kifolo**'s replacement. He noted that the supervisors did not want the new manager to have to walk into budget preparations and other tasks without the benefit of **Kifolo**'s expertise.

Earlier in the meeting, residents and supervisors alike praised and thanked **Kifolo** for her openness and efficiency. Schumacher said that in her nearly six years as manager, she has helped the township obtain about \$6 million in funding. "People have issues with her salary, but she got us \$6 million," Schumacher said.

**Kifolo**'s annual salary as full-time township manager was \$79,125. She submitted her letter of resignation to the supervisors in June. The supervisors have been interviewing applicants for her position.

"I'm trying to be humble," **Kifolo** said at her final meeting on Monday. "I think I've done a great job. I think I left the township in better financial shape than when I started."

**Kifolo** began as township manager on Nov. 1, 2012. There was no township manager prior to her. She said after submitting her resignation that she was proud of her role in building a post-retirement benefits fund, growing a reserve account earmarked for equipment replacement, recreation investment and road and bridge repairs, and keeping cost-overrun of the new township building below 0.5 percent.

## Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

Daily Item, The (Sunbury, PA) June 28, 2018

### Kifolo resigns as East Buffalo manager

Author: Eric Scicchitano

**Stacey Kifolo**, East Buffalo Township manager, submitted a letter of resignation to township supervisors. **Kifolo**'s final day on the job is Aug. 14. She informed supervisors of her resignation Wednesday. Supervisors will advertise its search for a replacement. **Kifolo** said her duties may need to be split among existing staff and supervisors until a new manager is hired, adding she'd help the transition in some ways.

"I'm extremely grateful, this has been a great opportunity. I've met a lot of great people. I've learned and grown personally and professionally. For the most part, the residents of East Buffalo Township have been fantastic to work with and work for," **Kifolo** said.

**Kifolo** began as township manager on Nov. 1, 2012. There was no township manager prior to her, she said. The township operated out of a temporary location at the time as the previous building was demolished to make way for the new building constructed along Fairground Road.

Supervisor Chairman Matt Schumacher described **Kifolo** as always informed and focused, detail-oriented and caring about the township and its residents. "She was excellent," Schumacher said. "She got us on a good financial footing. We now have money for future projects that allow us not to take loans."

Supervisor David Rowe said the goal is to hire a replacement before August, allowing two weeks for **Kifolo** and her replacement to work side by side. Anyone interested in the position should inquire as soon as possible. Specific requirements were still being drafted Thursday for a vacancy advertisement, he said. "In over a year that I've been attending meetings as both a resident and a supervisor I've been consistently impressed with her knowledge. We'll be hard-pressed to find someone who's even close to comparable," Rowe said.

**Kifolo**'s salary is \$79,165.

**Kifolo** said she is proud of her role in building a post-retirement benefits fund, growing a reserve account earmarked for equipment replacement, recreation investment and road and bridge repairs and keeping cost-overrun of the new township building below 0.5 percent. "In my opinion, the township is in a better financial position today then they were when I got here. There were things completely overlooked in planning for the future that we now have a much more solid foundation," **Kifolo** said.

**Kifolo** would not comment on her future plans.

## Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

Daily Item, The (Sunbury, PA) January 22, 2018

### East Buffalo, Lewisburg look to meet over BVRA

Author: Eric Scicchitano

Editor's note: This story was updated to reflect that former Supervisor Henry Baylor did not cast a vote in December concerning a notice of withdrawal from an intergovernmental agreement with Lewisburg for the recreation authority.

The Borough of Lewisburg asked three questions of neighboring East Buffalo Township as to why its supervisors served notice of intent to withdraw from a governing agreement for the Buffalo Valley Recreation Authority. Township supervisors answered the questions sent by letter last month during a public work session Monday night as public scrutiny of the withdrawal notice remains heightened.

Supervisor Char Gray and Chairman Matthew Schumacher agreed a full review of the agreement was needed, responding to the borough's inquiry as to which portions were considered for revision. As to what changes they desired, Gray said they won't know until reviewing the agreement.

The borough asked for the rationale behind the township's decision to pull out of the agreement at the end of 2018. Gray said the agreement is five years old. Supervisors want to explore the funding formula and look into other potential updates based on demographic changes, she said. A withdrawal would terminate the governing agreement, however, township supervisors pledged to continue funding and supporting the recreation authority indefinitely.

Schumacher and fellow Supervisor Michael Daniloff voted in December to serve notice of withdrawal. Former Supervisor Henry Baylor did not vote, leaving the meeting before the vote was held following a dispute with township manager **Stacey Kifolo** and a township resident. Gray was elected in November and replaced Baylor earlier this month. Baylor did not seek reelection.

Gray, Schumacher and Daniloff voted Monday to send a formal letter to the borough with the answers. Gray was tasked to arrange a meeting between borough and township representatives within the next two weeks. A Feb. 15 meeting offered by the borough wasn't possible because Gray, appointed this month to the recreation authority board, would be unavailable.

Stacey Sommerfield, executive director of the recreation authority, was invited to give a full overview of authority operations and programs at the township's public meeting next month. "East Buffalo Township does not want to get out of recreation," Gray told a crowd of 15 during the meeting, saying any perception otherwise is incorrect.

## Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

Schumacher said there's been no talk by township supervisors of lowering the amount of funds provided to the recreation authority, approximately \$116,000 in 2018. Lewisburg contributed about \$65,000. The combined total represents roughly 20 percent of the recreation authority's operating budget. "The pool will be funded because it needs to be there for the public," Schumacher said. Buffalo Valley Recreation Authority manages the Lewisburg-area public pool along with the Buffalo Valley Rail Trail, St. Mary Street park as well as a gymnastics program and various student and adult clubs and activities.

Jim Buck, a former township supervisor, asked for each supervisor to state whether or not they wish to have an intergovernmental agreement with Lewisburg concerning the recreation authority. Gray said she did. Schumacher and Daniloff said they weren't sure. "I'm weighing them," Daniloff said of unspecified alternatives.

Schumacher questioned the need for an intergovernmental agreement with Lewisburg. He said the township could enter its own contract direct with the recreation authority dictating the terms of funding. Sandra Cook, who chairs the recreation authority board, expressed concern that by eliminating the intergovernmental agreement, it would functionally delegitimize the authority's official status when pursuing grant funding. Registration-required programming like gymnastics all operate "in the black," she said, questioning whether the township intends to micro-manage the recreation authority's day-to-day operations.

Schumacher didn't say the township was interested in micro-management, but greater oversight is desired. "If they say 'yes,' then good for them. If we say 'no,' that's our right," Schumacher said, hypothetically, of voting to approve or deny support for a grant application, noting township supervisors and borough council members are separately elected by separate municipal voting bodies. "I want the power of the vote," Schumacher said, adding the only time he could foresee objecting to a grant would be if there were legal concerns raised by the township solicitor.

Taylor Lightman, of Active Millennials for Progress, questioned Schumacher's thinking as to why the township would continue intergovernmental agreements with Lewisburg for the fire company. If an annual stipend for the recreation authority was fit, why not the same for the other entities, Lightman asked. Schumacher said the township would then lose control over how those entities spend their respective dollars.

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# **Section 5**

## Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

Daily Item, The (Sunbury, PA) February 15, 2017

### EBT employees get to pick a paid holiday to lose

Author: Staff Writer

East Buffalo Township Supervisors are giving nine non-union employees the choice of which paid holiday they will lose this calendar year. The supervisors voted in January to drop the paid holiday traditionally given to employees on the first day of rifle hunting for deer. Rather than make the choice on the employees' behalf, supervisors tasked township Manager **Stacey Kifolo** to have the employees come to a consensus.

Chairman Michael Daniloff and Supervisor Matthew Schumacher favor trimming paid holidays from 11 days to 10 days. "It's not the day, it's the number of days," Schumacher said at Monday's board meeting, saying the move is a cost-saving measure. "I think 10 holidays and two personal days for a crew our size is reasonable," Daniloff said.

Supervisor Henry Baylor agreed with fellow supervisors that their purpose, in part, is to serve the taxpayers. "But also to protect our employees," Baylor said Baylor said his own poll of employees would have the supervisors drop Martin Luther King Jr. Day as a paid holiday. **Kifolo** challenged Baylor, saying she and others were never asked about preference.

Ultimately, **Kifolo** said the decision isn't up to the employees. However, she said she'd follow the supervisors' directive to poll the workers and return an answer at the March meeting.

## Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

Daily Item, The (Sunbury, PA) February 14, 2017

#### PennDOT, municipalities take aim at potholes

Author: Justin Strawser

Tuesday was a perfect day to start filling potholes that drivers hate on local roads, according to Sunbury City Councilman Dale Henry. "It's nice and warm, it makes it easier to go out and do this, so I sent out a crew," said Henry, who is director of streets. Street Department workers were sent out to fill "zillions" of potholes across the city, the councilman said. "We usually get a couple tons of coal patch, and we keep filling until we get rid of it," he said. Another batch of streets and alleys were addressed two weeks ago, he said. "We spent a good two days doing holes," Henry said. Stacey Kifolo, manager of East Buffalo Township in Union County, said pothole duty was "fairly light," at least until January. There was one outing in December but four days worth of work last month. At least two from the road crew are needed for a pothole project. East Buffalo has at least 60 man-hours spent on potholes this winter, and approximately \$500 or more spent on cold patch to fill the holes. Potholes pop up more frequently these days in the alleys near Penn House Commons, Kifolo said. She attributed it to an increase in traffic from construction projects. The Miller Center and the Penn Commons housing project are under construction, and work at the shopping center itself isn't far removed. "The alleyways are always a challenge because they don't have the same base structure as other roads, so heavy equipment makes it even worse," **Kifolo** said. Standing water or natural springs can exacerbate problems. That's why it's important to clear roadways of snow and ice, she said. "The crew is on the lookout for trouble spots throughout the winter. Residents are also very helpful in bringing them to our attention. Their time and effort is much appreciated," Kifolo said.

William Lowthert, Lewisburg borough manager, called the winter of 2016-17 a normal year for potholes. Residents haven't reported directly to the borough any problems with potholes, he said. "We have not seen a greater or fewer number of potholes than average," he said. The Borough Council is expected to vote this month on a repaying project to address worn-down streets and alleys in 2017 and 2018. Utility cuts into roadways can cause bumps and dips in streets, Lowthert said. "This is not the case with all utility cuts, but on average, they tend to have more potholes than uncut areas of the street," he said. Danville Public Works Superintendent John Hack said his department keeps up with potholes year-round and keeps a load of cold pack in the heated garage for use. He said they can fill potholes as long as there isn't snow or ice on streets. This year has been pretty good with "not near as many" potholes as in previous years. He attributed that to the weather. David Thomspon, the state Department of Transportation District 3-0 spokesman, said this timeframe is the best to address potholes. "Late winter and early spring are peak times for potholes to develop," he said. "PennDOT addresses these issues throughout the season. Pennsylvania's aggressive freeze-thaw cycle can take a major toll on our roads, and this winter, with its fluctuating temperatures, makes it especially challenging." State residents can report potholes by calling 1-800-FIX-ROAD, Thompson said.

## Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

Daily Item, The (Sunbury, PA) January 31, 2017

### Municipal officials share view on BVRPD billing switch

Author: Staff Writer

Representatives of Lewisburg and East Buffalo Township found consensus Monday on a single point amidst continuing disagreement over the terms of a contract governing municipal oversight and obligation to the Buffalo Valley Regional Police Department. Members of the governing bodies of the respective municipalities agreed to the merits of a proposed change in how the department is allocated local funds. They met during a joint work session Monday at the borough council chambers.

Township Supervisors Matthew Schumacher and Michael Daniloff along with township manager **Stacey Kifolo** proposed the change. They said the department finished 2016 with an estimated \$500,000 surplus and built up \$165,000 in a savings account.

The Lewisburg and East Buffalo Township contingents agreed they'd prefer to pay a monthly bill for actual expenses rather than provide an entire budgeted amount annually. The theory is the municipalities would retain unspent funding in the coming years versus allowing the department to build up a sizable surplus. Schumacher said he'd like the department to budget the existing reserve funds itself for capital expenses and equipment purchases over the coming years. "We don't want it back," Schumacher said.

Lewisburg Mayor Judy Wagner, borough manager William Lowthert and Councilman Michael Derman said they didn't oppose the switch and would discuss it with the full borough council. The East Buffalo representatives said they'd discuss the change with their own board. Wagner felt the issue could be addressed administratively by the Buffalo Valley Regional Police Commission rather than adopting changes to the existing intergovernmental agreement that governs department operations.

The six municipal officials spent the bulk of the work session going back and forth over oft-disputed points concerning the intergovernmental agreement — largely the existing funding split of the department's budget and the issue of departmental autonomy in directing police activities.

The department's budget is estimated at \$2.1 million, split 52-48 percent with East Buffalo paying the larger amount. By definition of the existing intergovernmental agreement, East Buffalo receives the majority share of Police Protection Units (PPU) — hours department officers spend in each respective municipality. Schumacher and Danilof have lobbied for a 50/50 split, saying the funding formula is unfairly weighted in Lewisburg's favor. They also favor eliminating PPUs, saying the department should determine by crime, not by funding, where officers spend time on patrol and investigations. Citing Uniform Crime Report figures from the department, Schumacher said the bulk of serious crime — burglaries, theft, acts of violence —

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# **Section 5**

## Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

occurs in Lewisburg. He estimated the split at 80-20 over the past five years. More arrests and citations are generated in Lewisburg but as a result, the revenue is also greater.

Wagner said if PPUs were eliminated, Lewisburg should be permitted to keep the bulk of revenues generated from fines. East Buffalo requested 50 percent of the available PPUs in 2017 rather than 52 percent. Derman raised concern that there is no defined process to make such a change within the intergovernmental agreement.

Lowthert said the borough is also concerned about funding shares since Lewisburg is landlocked and development is limited. East Buffalo Township has the advantage in the values of taxable properties and also development opportunities, Lowthert said.

Another work session is planned for 3 p.m. Feb. 15 at the East Buffalo Township municipal building on Fairground Road. It's open to the public.

## Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

Daily Item, The (Sunbury, PA) December 17, 2016

### Taxes tick up in East Buffalo Twp.

Author: Eric Scicchitano

East Buffalo Township supervisors made few changes in the township's official operating budget for 2017. Revenues are projected at \$3,928,643 and expenses at \$4,060,080. The deficit will be covered by cash rolled over year-to-year and saved in reserves. The final plan was adopted Monday.

According to **Stacey Kifolo**, township manager, revenues dipped approximately \$24,000 compared to the preliminary budget adopted in November after the township pivoted away from applying for grant funds for a traffic light project. Expenses rose \$6,200 due to an increase in long-term disability insurance, she said. The tax plan was adopted without veering from the 3 percent hike planned in the preliminary budget.

The general fund millage and millage for fire service remain at 4.5 and 0.46 mills, respectively. However, 2017 will bring see the return of a 0.07 mill tax for street lights and 0.08 mill tax for fire hydrants. The street light tax will be assessed on all properties. In the past, it applied only to properties near a light. The hydrant tax applies to all properties within 780 feet. "We have not charged a street light tax or fire hydrant tax since 2012. Those are coming back on," **Kifolo** said.

Total millage jumps to 5.11 — meaning property owners will pay \$511, up from \$496, on each \$100,000 of a property's assessed value. Michael Daniloff, supervisor chairman, said supervisors felt it was time to restore the old taxes rather than continue to pay those costs from the general fund. "It seemed appropriate to us to avoid an increase in the millage to the general fund," Daniloff said. "This is not a smoke-and-mirrors thing."

Spending in 2017 is predicted to rise 7.72 percent over 2016, due in large part to a loan payment, post-retirement benefits and engineering services.

Police services represent 27 percent of projected spending. East Buffalo Township plans to contribute \$1,116,752 to Buffalo Valley Regional Police expenses, down 1.86 percent compared to the current year.

Operational costs are split with Lewisburg, and the methodology in dispute with the borough. An audit of department finances is under way, and contract negotiations between the police union and the police commission — representatives of both the borough and township — remain in arbitration.

## Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **Stacey Kifolo** is listed below.]

Daily Item, The (Sunbury, PA) June 13, 2016

### EBT approves \$10M Bucknell student housing plan

Author: Eric Scicchitano

In other business, supervisors are working with the Buffalo Valley Recreation Authority to pay off its half of a loan the authority took out to make storm water repairs to a Lewisburg borough park. The PennVEST loan has about \$178,000 remaining to be paid over 10 years, said township manager **Stacey Kifolo**. East Buffalo Township has approximately \$90,000 set aside and is earning 1 percent on the savings; however, the loan interest is 3 percent.

Supervisors voted last month to pay East Buffalo's half. The snag, **Kifolo** said, is Lewisburg borough, which guaranteed the other half of the loan, is unable to do the same at the moment. She said the authority seeks alternatives, such as refinancing half the loan and paying off the other half. The municipalities share operational costs of the authority.

**Kifolo** announced the township received a state recycling grant totaling \$55,756. The funds will be used, in part, to offset some out-of-pocket expenses for an already-purchased leaf vacuum along with additional security cameras, residential recycling bins and a community paper-shredding event. The township is waiting on reimbursement for a previous grant award of \$164,000, **Kifolo** said, which was used for a new wood chipper, security cameras and other expenses.

Supervisors approved spending up to \$18,000 to remediate part of Limestone Run, from near the municipal building to a box culvert on Fairground Road. The expense will match grant money received by the Union County Conservation District, **Kifolo** said. Lewisburg borough will remediate the portion of the stream that runs from the culvert to the Lewisburg Area Recreation Park on St. Mary Street.

## Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

Daily Item, The (Sunbury, PA) May 11, 2016

### East Buffalo supervisors reject pitch to expand board

Author: Eric Scicchitano

A pitch to expand the size of the East Buffalo Township Board of Supervisors was turned down Monday. Supervisors Michael Daniloff, chairman, and Matthew Schumacher voted against Supervisor Henry Baylor's proposal to expand the board from three to five members.

Daniloff said the far majority of Pennsylvania's second class townships, like East Buffalo, have three-member boards. He said the supervisors' current workload doesn't justify an expansion, and that a smaller board allows for more "discussion and decision making in the public eye."

"I think we have less work. That's because the township manager (**Stacey Kifolo**) is doing the job we've hired her to do," Daniloff said. Schumacher agreed with Daniloff. "I'm not a fan of bigger is better. I didn't see the point," he said.

Baylor argued that an expansion would improve communication and production among supervisors, saying the three-person body is restricted by state law governing quorums and open meetings — meaning two members can't discuss township business privately under the terms of the law. "Nothing is going to change the other two members' minds," Baylor said.

Of five second-class township's who responded to his inquiry about size of governing bodies, he said three responded favorably about their respective changes from three to five members. The cost would be an additional combined \$5,000 to pay two new member stipends annually. It could also result in longer discussions and meetings, he said.

## Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

Daily Item, The (Sunbury, PA) March 29, 2016

#### East Buffalo Township to refinance \$1.8 million loan

Author: Eric Scicchitano

East Buffalo Township Supervisors intend to refinance an existing loan and take out a new one in a modest effort to fill a multi-million gap in its post-retirement health care benefit fund.

The supervisors voted 3-0 to refinance a \$1,855,655 loan, originally from Swineford National Bank, through West Milton Bank. The interest rate will drop to 2.1 percent from 2.49 percent, creating an estimated savings of \$35,000 over seven years. The rate resets over the final 10 years.

The monthly payment drops to \$10,825 to \$11,287. Savings will be used to pay the interest on a \$500,000 loan to fund retiree health care. **Stacey Kifolo**, township manager, said the township has amassed a \$3.3 million unfunded obligation to the fund.

The fund was established about 30 years ago, according to township supervisors. The deficit was discovered in an actuarial report several years ago, and the township began obligating funds three years ago — an estimated \$320,000 combined.

Supervisor Henry Baylor said past supervisors failed to pay into the fund. To not take action would result in a hefty tax hikes in years to come, added Supervisor Matthew Schumacher. "We're obligated at this point to make that benefit available," said board Chairman Michael Daniloff.

The benefit largely supplements retirees enrolled in Medicare. However, police officers, eligible to retire at age 55, could receive the benefit in lieu of Medicare. Thirteen retirees or spouses of retirees are currently enrolled. New township employees are ineligible to enroll post-retirement.

## Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

Danville News, The (PA) December 9, 2015

Rock salt use may hit the skids: Temps delay Valley towns from plowing into pricey piles Author: Staff Writer

The price of rock salt used to treat Pennsylvania's roads jumped throughout the commonwealth, but municipal coffers could find an ally in Mother Nature. December has been marked by unseasonably warm weather to date, with temperatures expected to top 60 degrees Fahrenheit this weekend. Mild temperatures are forecast through month's end and aside from a few flurries, snow accumulation has been negligible. As a result, plows haven't hit the roads and neither have the tons upon tons of rock salt and anti-skid scattered and sprayed across the Valley each winter season. Rock salt prices in 2015 rose 12.3 percent to \$71.93 a ton on average through Pennsylvania's cooperative purchasing program, CoStars, which has 1,655 participants. The increase averaged 8.4 percent in the Valley, rising to \$67.71. Northumberland County has the highest price in the Valley at \$70.49 a ton. Compare that with the \$63.99 cost in 2014. Montour County came in at \$69.85, up from \$60.99; Snyder County, \$66.88 compared with \$63.99 one year ago. Union County has the lowest rate in Pennsylvania at \$63.60, up from \$60.99 in 2014. The highest rate belongs to Franklin County: \$87.62. Supply and demand, production and transportation costs all factor into the price, said Troy Thompson, a spokesman for the state Department of General Services. It could have been higher, however. A reverse auction, the first used by the department for salt bids, saved Pennsylvania \$10 million from the initial pre-auction asking prices, he said. PennDOT has 37,215 tons of salt and 78,162 tons of anti-skid stockpiled to cover District 3's 4,500 miles of state roads in nine counties: Bradford, Columbia, Lycoming, Montour, Northumberland, Snyder, Sullivan, Tioga and Union. The district's budget calls for 67,000 tons of salt this winter, based on an average of the five previous winters. "The last two winters were very harsh with much higher than typical salt usage in Pennsylvania and many other states in the Northeast," Thompson said. Last year, more than 83,000 tons of salt, 73,800 tons of anti-skid and 648,000 gallons of brine were used in District 3, which has headquarters in Montoursville. A mixture of salt and water, brine lowers the freezing temperatures on road surfaces, allowing for easier removal of snow and ice.

East Buffalo Township has 285 tons of road salt and 375 tons of anti-skid material — about half its projected need this winter, according to **Stacey Kifolo**, township manager. The township is starting the season with more on hand to treat its 55 miles of roads. "We wanted to be prepared. Last year we ended up relying on (Buffalo Township) to get us through the end of the year," **Kifolo** said of borrowing material from the neighboring Union County township. Sunbury has 450 tons on order to treat its 41 miles of roads. If the mild weather pattern holds into the new year, there's a chance it may not have to take it all. Through CoStars, participants need only use and pay for 60 percent of a total order, city manager Terry Specht said. "It could stay like this for the rest of the winter as far as I'm concerned," said Mike Bordner, the city's public works supervisor. Should the winter worsen significantly and 450 tons aren't enough, up to 140 percent of the order can be purchased at the contracted rate, Thompson said. Anything beyond that is sold at market rate, he said.

## Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

Daily Item, The (Sunbury, PA) November 10, 2015

#### Real estate taxes may inch up in East Buffalo

Author: Staff Writer

A proposed fractional tax increase along with the implementation of employee health care contributions were approved Monday by the East Buffalo Township supervisors.

Real estate taxes are planned to inch up 20 cents on each \$1,000 of a property's assessed value if the final budget includes the suggested millage rate of 4.5. A property assessed at \$100,000 will see its bill rise by \$20 under the proposed rate. Double that for a \$200,000 property. The current rate is 4.3, and isn't enough to cover a projected \$52,000 for 2016.

The preliminary budget estimates spending at \$4,068,581 compared to \$4,016,320 revenue. The budget proposal is available for public review at the township municipal building, and the final budget is expected to be ratified at the regular December meeting. Township employees for the first time will be required to contribute to their health care premiums.

Supervisors approved a 2 percent contribution rate across the board for health care, dental and vision coverage. That will shave an estimated \$3,700 from the township's \$182,000 cost for health care. Nine full-timers and seven retirees are covered.

Employees had not previously contributed to health care or dental coverage. A 10 percent contribution was required for vision coverage, but that amounted to less than \$7 for singles and less than \$18 for families annually.

Some in the audience scoffed at the coverage cost and contribution rate. Supervisor Henry Baylor said the township is taking steps to gradually normalize the rates compared to the private sector. There was a time, he said, when employees could receive reimbursement for deductibles. That's no longer in practice.

East Buffalo Township saved more than \$11,000 by sticking with a coverage plan under Capital Blue Cross that's compliant with the Affordable Care Act, according to township manager **Stacey Kifolo.** 

## Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

Daily Item, The (Sunbury, PA) May 12, 2015

### \$60G grant en route to study Lewisburg, East Buff consolidation

Author: Staff Writer

In what may be one of the fastest approvals from the state, the grant application from East Buffalo Township to fund a feasibility study to look at consolidating with Lewisburg got the official OK Tuesday afternoon.

East Buffalo filed the application in March for the Early Intervention Program grant with the Pennsylvania Department of Community and Economic Development, said Thomas Zorn, supervisors chairman of East Buffalo Township.

A DCED official said the quick approval came about simply because the money was available, Zorn said. The grant likely will be between \$60,000 and \$70,000.

It's the latest step toward combining the township and borough into one municipality. The feasibility study will look the pros and cons to the township and borough to making such a move, including tax concerns, ordinances and form of governing. It takes three to six months to complete such a study, Zorn said.

Township Manager **Stacey Kifolo** and Borough Manager Chad Smith now will work on putting together a request for proposals for the study, Zorn said. It should go out before the end of June with an award hopefully made before the end of summer, he said.

DCED emailed the grant contract to East Buffalo Township late Tuesday afternoon. Zorn said he and fellow supervisors Henry Baylor Jr. and Michael Daniloff, as well as **Kifolo**, must sign it; the state then requires the signed document be delivered in person, to which Zorn said he'll make the trip to Harrisburg today.

h.

# **Section 5**

## Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **Stacey Kifolo** is listed below.]

Daily Item, The (Sunbury, PA) April 4, 2015

### DeLong's \$72G pay rare for size of municipality

Author: Staff Writer

Over in Union County, Township Manager **Stacey Kifolo** of East Buffalo Township, Union County, is paid an annual salary of \$73,154, and that township's Secretary-Treasurer Barry Troxell, is paid \$69,267 a year, according to **Kifolo**.

East Buffalo has a population of 6,416 spread out over 15.6 square miles, making it nearly twice the size of Mahoning Township, whose population of about 4,300 lives within 8.2 square miles.

"I oversee the public works department and all those functions and run the day to day operations of the township," **Kifolo** said.

## Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

Daily Item, The (Sunbury, PA) October 29, 2014

### East Buffalo pares employees' health care benefits

Author: Staff Writer

Noting no other employer in the Valley covers the entire cost of workers' health care, the East Buffalo Township supervisors on Wednesday voted unanimously to have employees fund their own copays and deductibles, a move that puts 10 full-timers on the hook for \$1,000 to \$2,000 per year. The move was among many benefits changes that may save the township \$100,000, supervisors Chairman Thomas Zorn said during the special public hearing. Municipal employees also will now be responsible for 10 percent of their vision coverage.

The township still will cover its workers' premiums. The supervisors delayed having employees pay a share of it this year because of the sudden financial impact it would have, Township Manager **Stacey Kifolo** said. The changes, however, "could very well be a first step, depending on how things go, where the township is financially and the overall costs for coverage," she said.

The votes didn't come easily to Supervisors Henry Baylor Jr., Michael Daniloff and Zorn. The approval to change the health care and vacation accrual came after lively debate on employee impact versus financial reality. Other changes include:

n Short-term disability coverage has been eliminated, replaced with accumulated unused sick days. Long-term disability coverage remains.

n Employees who are Medicare-eligible may no longer be on the group plan. This is a change mandated under the Affordable Care Act.

n New employees will not get post-retirement health-care coverage. Zorn said the township must pay about \$340,000 per year to meet its current obligation.

n Vacation time no longer is given as a lump sum on an employee's anniversary date but will be accrued in four- to six-hour increments per pay period.

n There will be 11 paid holidays, including the day after Thanksgiving. Primary and general election days are no longer included.

Savings wasn't the main goal, Zorn said, although East Buffalo could see at least \$100,000 a year in its pocket with the new measures. The township's 2014 budget totals \$3.5 million. The changes were about six months in the making. Daniloff, a former chief executive officer of Evangelical Community Hospital, and **Kifolo** led the review, which looked mainly at the township's "Cadillac" health coverage, for which employees pay nothing and were reimbursed for copays and deductibles incurred.

The supervisors needed to act before Saturday as current health benefits expire Dec. 1 and employees must have 30 days' notice of changes. It made sense to look at everything and modify benefits so they compare favorably with others, being "neither too rich or too little," Zorn said.

## Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

"We tried to balance and provide a solid package to employees but to consider our fiduciary responsibility to the citizens. They pay for it."

Baylor, a township board member for about 14 years, voiced concern for the financial burden on employees who, he said, already are not paid a lot and who perform "a very unique job" in the municipality. The average East Buffalo Township salary is \$40,000, **Kifolo** said. An employee who earns \$45,000, for instance, now will be responsible for about \$1,300 toward health care. The township has 10 employees considered full time, or who work 35 or more hours per week, she said.

Previous boards may have promised employees benefits "but should have stated it's not in perpetuity. All these things are subject to change," Daniloff said, calling it "a very good idea" to review the benefits and commending Zorn for initiating the process. "We've sliced and diced this over six months," Daniloff said. "The final benefits package is fair. ... There is not another employer in the region that absorbs the full cost of an employee health care plan." Daniloff also challenged Baylor's calling the township jobs unique, saying, "There is nothing unique about these jobs at all, yet we paid premium (benefits) for them."

East Buffalo's health care provider will remain Capital Blue Cross, whose costs dropped about 19 percent this year, **Kifolo** said, adding that she anticipates shopping for a new plan next year. With the reduction, premiums for health care and prescription coverage for a single employee will be \$7,909. Costs for an employee and one child will be \$16,608; with a spouse, \$17,478; and for an entire family, \$23,029.

Vacation time was another contention. Baylor wanted to hold off on a vote to change the allocation, concerned the juggling will short three employees. Daniloff dismissed that, saying the matter can be addressed individually with workers instead of holding up the entire vote. "What's left to find out?" Daniloff asked. "You (Baylor) need to get with the program. It's clear no employees are losing vacation." Employees now will accrue paid time off by hours per pay period, between four and six hours, instead of getting it all at once on their anniversary dates.

The fully paid health care has been in place since about the 1970s, the supervisors said. Daniloff, who has lived in East Buffalo Township for 38 years, said he guesses this is the first time the board has fully disclosed the employee benefits. "To the public in particular, you need to have full disclosure," he said. A handful of people attended the meeting, expressing astonishment upon hearing of the township's employee benefits. "You have to consider your employees," said one man, who asked not to be identified, "but we're the ones paying the bills. I think it's still too much, what you're giving," adding it was no surprise to hear the township has a zero employee turnover rate.

## Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

Daily Item, The (Sunbury, PA) April 8, 2014

### 'Smart' traffic signals coming to Route 15

Author: Evamarie Socha

Smart red lights at three intersections on Route 15 near Lewisburg are happening under a \$325,000 grant from the Pennsylvania Department of Transportation's District 3, which secured the funding with Union County's needs in mind. East Buffalo Township supervisors approved submitting applications for the adaptive traffic signals at their meeting Monday night. The township signed off on two lights, at intersections of Routes 15 and 45 and at Routes 15 and 192.

Township manager **Stacey Kifolo** told the panel the resolutions — and subsequent paperwork — tell PennDOT the township understands its role in ownership and maintenance of the "adaptive signal technology" signals, which use video cameras and computer software to "see" traffic, how it's cueing or backing up and which direction of traffic needs to move next.

Lewisburg Borough Council must take the same measures, likely at its meeting next Tuesday. The borough also must approve submitting an application for the red light at Route 15 and St. Mary Street.

The funding came through an "adjustive corridor project" in which PennDOT is distributing \$11 million statewide for such signals to alleviate traffic congestion on roads such as Route 15, **Kifolo** said.

Union County has wanted the higher technology signals to improve traffic flow at the intersections and has applied for funding through the state's Automated Red Light Enforcement Transportation Grant. However, such funding usually goes to more urban areas.

Other communities that use the system have seen 50 percent to 100 percent improvement in traffic flow efficiency. Engineers involved with the Route 15 Corridor Project determined older signals that can't keep up with the traffic conditions of the day have made for significant congestion at the three intersections. This also has made for traffic volume increases on the cross streets.

## Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

https://www.wnep.com/article/news/local/union-county/east-buffalo-township-opens-new-offices/523-c79ed0f6-cf4e-4bf8-8de9-dfd53b7f8c44

September 12, 2013

#### **UNION COUNTY**

### **East Buffalo Township Opens New Offices**

Author: Nikki Krize

The East Buffalo Township Municipal Building is ready to open, and on Thursday, officials moved into their new offices near Lewisburg. Officials say the old building was torn down last year because it was in bad condition. That made way for the new \$3.5 million facility, which officials said did not cost taxpayers any money.

Township officials say the place was deteriorating. "It was actually falling apart. It was to the point where the steps out front were not safe to go up and down. We taped them up so people couldn't go up and down," Secretary/Treasurer Barry Troxell said.

"Cinder blocks that were so deteriorated that squirrels were living in the cinder blocks, that kind of thing," township manager **Stacey Kifolo** said.

Township officials voted to tear down the building and build a new one, along with a new public works garage. The project cost \$3.5 million. Officials say \$2 million came from a bank loan and the rest of the money is from the township's general fund. But the new facility is not just for offices. "We're also able to bring the planning and zoning department into our facility. Our planning and zoning department serves three municipalities," **Kifolo** said.

"The old township building did not have a community center but this new one has a community room with space for more than 200 people. Township officials say the plan to let non-profit groups meet here for free. "We didn't have the space before. There's a lot of groups that are going to be using it," Troxell said.

Officials say the township's vehicles will be housed inside the 13,000 square foot public works garage. "It's a lot of space for our equipment that we didn't have before. We're going to be able to take all our trucks in there in the winter time especially. They will be warm and ready to go when they get ready for snow plowing," **Kifolo** said.

The building also has a 700 square foot area that is vacant. East Buffalo Township officials are looking to rent it out to a non-profit or a government group.

## Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

Daily Item, The (Sunbury, PA) January 10, 2013

### James Buck becomes chairman in East Buffalo Township

Author: Evamarie Socha

James Buck has been elected chairman of the East Buffalo Township supervisors, and the board will go to once-monthly meetings beginning at 6 p.m. Monday. Buck — who will leave the board at the end of this year, possible for a Fulbright scholarship overseas — takes the reins from Henry Baylor Jr., who was chairman for three years. "I'm excited," Buck said Wednesday. "It's nice to have that trust for my final year on the board." Buck also was named the township's alternative representative on the Buffalo Valley Regional Police Commission, on which Baylor and Supervisor Thomas Zorn also sit.

Zorn nominated Baylor for the chairmanship again, but Baylor turned it down and, in turn, nominated Buck. "I felt strongly about Hank continuing for another year," Zorn said, adding he feels the chairmanship is a "position of honor and prestige that (Baylor) should continue with. Hank has a different view."

Baylor said with Buck having just one year left, it was time to let him have a go at the office. "Jim has not had a chance to get really involved with the township on committees," Baylor said. "I would like to see him become more a part of it, so why not make him chairman and give him the opportunity?" Baylor also said people have the wrong idea about the chairmanship. "It's a hoot to be able to run the meetings, and that's the only distinction, really," he said. "A lot of people have this idea about the chairman having this power. That's not correct."

Nevertheless, the three supervisors have made for lively meetings over the past two or so months with Buck opposing Baylor and Zorn on some issues, specifically the new municipal building complex, a \$3.5 million project expected to be done close to fall. Buck felt strongly — and still does — that the project should have stayed closer to the \$3.1 million price tag recommended by former Township Manager Peter Marshall.

Baylor commended **Stacey Kifolo**, who joined the township as full-time manager in October, and said the job she's doing is the main reason the board is going to one meeting a month. "The objective of hiring a township manager was to off-load significant responsibility to that person, and that's worked," Baylor said. **Kifolo** has "really picked up ball and run with it," so much so that completing daily business and activities lessens the need for two meetings a month.

The meetings will begin at 6 p.m. on the second Monday of each month in the township's temporary home at 57 Reitz Blvd.

## Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

Daily Item, The (Sunbury, PA) October 18, 2012

### East Buffalo Township appoints manager

Author: Evamarie Socha

**Stacey Kifolo**, of Lewisburg, is the new manager for East Buffalo Township. She is the first woman to hold a full-time township executive position in Union County, officials announced Wednesday. The township supervisors voted unanimously to hire **Kifolo** during a special meeting Wednesday morning. She is fiscal coordinator for the Central Pennsylvania Workforce Development Corp. **Kifolo**'s starts with the township on Nov. 1 at a yearly salary of \$67,000. She will get full benefits, including health care and pension. "I am over the moon," **Kifolo** said of her new job. "It will be challenge, but I'm excited."

Kifolo has worked in the nonprofit sector for 13 years, she said. This job, which was advertised in two national trade journals, interested her because "I found myself gravitating toward positions where I can make a difference. I saw that job and knew what was happening in the area, there is a lot going on." "Her energy and enthusiasm were hard to match," Supervisor Thomas Zorn said. While Kifolo doesn't have municipal government experience, "she was the most qualified and the best overall candidate we interviewed. We were very impressed with her knowledge," he said. Kifolo is "an excellent choice," Supervisor Henry Baylor Jr. said. "She has the ability to do all the things we really require that manager to do. ... I look at this municipality as a business, and the process behind the service is the same: it's inventory, it's people, it's money." Kifolo enters a township government that is decidedly male. There are several women who hold township secretary and treasurer positions, but those are all part-time, Zorn said. There are some women who are township supervisors, but those are elected positions. On the borough government side, there are some women managers. Kifolo is confident she can work with all these men, she said. "I certainly talked with them about the issue. But I am from a maledominated family; if you couldn't play with the boys, you couldn't play."

There were about 60 applicants for the job from states as far away as Alaska and Maine. The supervisors and interim township manager Peter Marshall narrowed down the field to 10 candidates, whom they interviewed over the past few weeks. Of those 60 hopefuls, three were women, Zorn said. **Kifolo** was the only woman in the final round. "It's nice to see in that we're able to do something in this area for the first time," Zorn said. "Like anything, it will be a challenge for her and will be different, but we really asked specific questions about it and dealing with it, and we were all convinced she can handle that challenge." **Kifolo** also served nine years as a corporate business manager for a nonprofit organization and before that six years in sales and finance in the automotive industry. She holds a bachelor's degree from Bloomsburg University in business administration with a marketing focus. She was born and raised in Lewisburg. **Kifolo** succeeds Marshall, who has been interim part-time township manager since October 2011.

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# **Section 5**

## Internet – Newspaper Archives Searches Stacey L. Kifolo (Articles are in reverse chronological order)

Susquehanna County Independent & Weekender (Montrose, PA) November 22, 2006

### Bethesda receives Operation Good Neighbor Foundation grant

Bethesda's Corporate Business Manager, **Stacey Kifolo**, was responsible for writing the grant on behalf of the Agency. Bethesda was approved by the Foundation's Board of Advisors to receive a \$10,000 technology grant for the agency's extensive treatment and family intervention programs for troubled youth.

To directly enhance Bethesda's services, the funding will be used to purchase computers and projectors in order to deliver materials in an appealing format that will capture clients' attentions and keep them engaged in the education and counseling processes.

Bethesday Day Treatment Center in South Montrose will benefit from the Operation Good Neighbor Foundation grant. Bethesda provides Alternative Education for Disruptive Youth, Intensive Adolescent Day Treatment, Specialized Foster Care, and a Medical Assistance approved Outpatient Drug and Alcohol Program. Visit www.bdtcpa.org.

Research Compiled by: Sarah Linares

Colin Baenziger & Associates