



STRATEGIC MANAGEMENT PLANNING PROGRAM

STEP 5 – MULTI-YEAR PLAN

STEP 6 – MULTI-YEAR IMPLEMENTATION



**PREPARED FOR: LATROBE CITY COUNCIL
NOVEMBER 1, 2024**

ACKNOWLEDGEMENTS

The Grass Root Solutions (GRS) team would like to thank the City management and staff for their excellent cooperation and assistance. Without their support, this project would not have been possible.

Elected Officials

Eric Bartels	Mayor
Ralph Jenko	Deputy Mayor
Ann Amatucci	Council Member
Dawn Vavick	Council Member
Bridget DiVittis	Council Member
James Kelley	Council Member
William Yuhaniak	Council Member

Staff

Terry Carcella	City Manager
Karen Meholic	Finance Director
Richard Bosco	Chief of Police
Dan Weimer	Code Enforcement Officer
Scott Wajdic	Public Works Supervisor

Consultant Team

Deborah Grass	Project Manager
Tricia Levander	Financial and Budget Analyst
Ronald Leindecker	Police Consultant
Jason Dailey Technology)	Operations Consultant (Public Works, Sewer, Code Enforcement, Parks,

DCED

George Newsome, Local Government Policy Specialist
Governor's Center for Local Government Services, Department of Community and Economic Development (DCED)

This project was partially funded through a grant from the Pennsylvania Department of Community and Economic Development, Governor's Center for Local Government Services under the Strategic Management Planning Program.

Introduction

In Step 4 of the STMP, the management review of the departments identified the structure, staffing, and operational improvements that are recommended for support of a streamlined, more effective organization that will be strong and flexible enough to meet the challenges of modern government and the increasing demand for public services. These recommendations focused on setting professional standards, modeling best practices, adding administrative staff, and adopting a regional approach for the delivery of services.

The STMP guidelines state that Step 5 should be structured to identify the City's top five financial and management priorities. Additional prioritization is to be conducted at the departmental level. Interdepartmental objectives that are City-wide or county-wide in nature are to be detailed in the Plan. The STMP guidelines require that each objective is to contain a detailed action plan that describes (1) what is to be achieved, (2) the budgetary impact, (3) the timing and deadlines for each action step, and (4) which employee or agency has the primary responsibility for the objective.

Goals and Action Items

Based on the information derived from the financial analysis, feedback from elected officials, and discussions with management, the consultant team is recommending a Plan that includes action steps and identifies activities necessary for the City's fiscal and organizational health. The Plan focuses on revenue growth strategies, expenditure reductions from service-delivery efficiencies, adoption of best practices, and intergovernmental cooperation strategies.

The Plan identifies five priorities for the City and a set of action steps within each priority. Step 5 should be read in conjunction with the recommendations that are included in other sections of the Plan. For each priority, Step 5 includes descriptions of the priorities and specific action steps.

Implementing these recommendations will take significant effort by City officials and staff. Many of the recommendations and goals will challenge the traditional notions and practices that the City has adopted over time, but many of the current practices are ineffective and are no longer useful for cultivating and supporting a modern and effective local government organization.

As a result of the review, analysis, and synthesis of material and information from Steps 1 through 4 of the Plan, and after discussions with management staff and Council about the goals of the Plan, the following priority goals for the City have been identified.



STEP 5 – MULTI-YEAR PLAN STRATEGY

TOP FIVE PRIORITY GOALS

GOAL 1: THE CITY WILL HAVE A SOLID AND SELF-SUSTAINING REVENUE BASE.

GOAL 2: THE CITY WILL ENHANCE ITS ADMINISTRATIVE AND FINANCIAL MANAGEMENT CAPACITY.

GOAL 3: THE CITY WILL CONTINUE TO ANALYZE THE SOLID WASTE COLLECTION AND MODERNIZE THE TRANSFER STATION.

GOAL 4: THE CITY WILL UPGRADE TECHNOLOGY IN ALL DEPARTMENTS.

GOAL 5: THE CITY WILL PREPARE AND ADOPT AN ANNUAL CAPITAL IMPROVEMENT PLAN (CIP) SUPPORTED BY FUNDING STRATEGIES.

HISTORY AND PROJECTIONS – REVENUE AND EXPENDITURES 2018-2027

Revenues over the past six years have increased at a rate of 3% per year partially due to the bond refinancing and the receipt of federal funds. Expenditures have been increasing by 2% per year over the same period which is extremely good cost containment. This has contributed to an unrestricted fund balance estimated to be about \$4.7 million at the end of 2024. But the projected rate of increase for revenue in the future is about 2.8% per year and the rate of increase projected for expenditures is about 4.4% per year. Eventually, without intervention, expenditures will outpace revenue and cash reserves will be depleted.

YEAR	BEG BALANCE	REVENUE	EXPENDITURES	DIFFERENCE	ENDING BALANCE	STATUS
2018	1,792,783	5,938,558	5,684,693	253,865	2,046,648	Audited
2019	2,046,650	6,296,491	6,240,900	55,591	2,102,241	Audited
2020	2,181,146	6,431,344	6,420,526	10,818	2,191,964	Audited
2021	2,280,462	7,974,225	6,726,851	1,247,374	3,608,942	Audited
2022	3,608,942	7,255,385	6,215,901	1,039,484	4,648,426	Actual
2023	4,648,426	7,152,326	7,031,737	120,589	4,769,015	Estimated
2024	4,769,015	7,167,422	7,175,180	(7,758)	4,761,257	Estimated
2025	4,761,257	7,272,432	7,337,886	(65,454)	4,695,803	Estimated
2026	4,695,803	7,378,922	7,562,930	(184,007)	4,511,796	Estimated
2027	4,511,796	7,487,603	7,817,223	(329,620)	4,182,176	Estimated

GOAL 1: THE CITY WILL HAVE A SOLID AND SELF-SUSTAINING REVENUE BASE.

REAL ESTATE TAX

- The current millage rate is 21.3 for general purposes – and .2 mills dedicated for library purposes. *
- The City's current real estate tax collection rate is about 95% which is a very good rate.
- The City collects \$1.3 million on current real estate tax collections making up about 29% of the total revenue.
- Unfortunately, the City only collects about \$61,000 on 1 mill of tax due to outdated county assessments.
- County assessed values are only 17% of the market value – if the assessed values were closer to market values, the City could decrease its millage rate to about 3.5 mills and still generate the \$1.3 million in collections.
- The City should work with other Westmoreland County communities to petition the county for a reassessment.
- The City should continue to work to increase the values of both residential and commercial property to ensure that future years will reflect higher market values and subsequent increases in assessed values. Aggressive code enforcement activities and attention to neighborhood amenities will help to improve property values and increase assessments so that millage rates can remain low.

ACT 511 TAXES

The rates for EIT, LST, and Deed Transfer tax are established at specific levels under Act 511 (the Local Tax Enabling Law) but Latrobe may increase the EIT and Deed Transfer taxes above those levels under its Home Rule Charter. To maximize the ability to collect all taxes, the following conditions are noted:

- About 12.4% of the City residents are below the poverty level – this depresses the collection of EIT.
- About 32% of housing units in Latrobe (about 1260) are rental units. For this reason, an annual registration of tenants with an established fee should be required because it provides information for tax collection, public safety, and code enforcement purposes. The inspection program should be upgraded to include mandatory inspections every two or three years. Preserving housing stock and maintaining strong neighborhoods is a key element for long-term sustainability and resilience.
- About 7% of the housing units are vacant. The City should track its vacant properties and ensure that owners are responsible for the maintenance and upkeep of these properties.
- The City should cross-check its EIT list with sewer, water, and garbage lists to make sure that all residents' information is shared with all tax collectors.
- The City can raise its mechanical device tax and/or implement an amusement tax.
- The City can levy a flat tax under Act 511 of \$100-\$500 for each business based on number of employees.

*As a Home Rule community, the City does not have a cap on its real estate tax millage rate.

GOAL 1: THE CITY WILL HAVE A SOLID AND SELF-SUSTAINING REVENUE BASE.

ITEM	ESTIMATED NEW REVENUE	COMMENT
Increase Delinquent Tax Collection	\$10,000	Work with county, school district, provide better data, adopt more aggressive process for collections
Increase Realty Transfer Tax	\$90,000	Increase the realty transfer tax from .5% to 1%
Increase Mechanical Device License	\$40,000	Increase fee to \$1000 per device
Implement annual rental registration fee	\$85,000	Rental registration at \$35/unit (separate from inspections) provides important information for taxing and public safety purposes
Invest idle funds strategically	\$125,000	Explore investment opportunities such as PLGIT for unrestricted fund balance
Increase Fees to Cover All Expenses	\$5,000	Raise parking meters, permits, application rates to cover all expenses related to the services provided
Audit Cable TV Franchise Fees	\$5,000	Use special legal counsel to review the franchise agreement and audit revenue from this source
TOTAL ESTIMATED NEW REVENUE	\$360,000	Equal to 5.9 mills of tax

GOAL 1: THE CITY WILL HAVE A SOLID AND SELF-SUSTAINING REVENUE BASE.

DEGRADATION FEES - Municipalities are permitted to manage cuts in their streets with use of street opening permits. These permits assist the community in tracking who is doing what work on their roads and insuring they are being properly repaired. Cities are permitted to institute degradation fees that can be imposed on utility companies that may do routine or maintenance work within 5-10 years after a road has been resurfaced or treated. Fees are pro-rated and lessen over time.

DEDICATED FUNDING SOURCE FOR STREET MAINTENANCE -The City should consider dedicated special purpose millage for regular street maintenance funds restricted for this use. The City needs an annual, dedicated revenue source for its resurfacing program to ensure that roads are kept up to an acceptable level. It would be expected that a community with 41.2 miles of streets and another 6 miles of alleys would be replacing 4 miles of roadway per year on a 10-12-year program. As a Home Rule community, the City could levy dedicated millage that would be used for road paving and reconstruction.



STORM WATER MANAGEMENT FEES - The City collects an annual stormwater fee that is billed once annually at a rate of \$90 per household and business. This fee typically generates approximately \$410,000 annually. The entire City is under the DEP permitted Municipal Separate Storm Sewer System (MS4) program. The Latrobe Municipal Authority has begun to map about 50% of the storm system in their GIS system using the same municipal engineer as the City. There is an active five-year capital plan for stormwater projects that includes:

- Underground retention and property acquisition at Jefferson Street
- New stormwater retention, rain garden, conveyance pipes and drains, on JoAnn Drive.
- Stream work on Mary Street
- Underdrain installation ahead of a paving project on Fairmount Street.

The City should continually ensure that the fee is sufficient to address planned stormwater projects.

GOAL 1: THE CITY WILL HAVE A SOLID AND SELF-SUSTAINING REVENUE BASE.

To meet this Goal, it will be necessary to:	
Action 1A	Ensure that all current and delinquent taxes and fees are aggressively collected.
Action 1B	Consider new taxes under Act 511 such as amusement tax, commercial parking, and health and safety taxes.
Action 1C	Consider increases to existing Act 511 taxes such as mechanical device and realty transfer taxes.
Action 1D	Impose a business privilege flat tax levy under Act 511 on a sliding scale of \$100-\$500 on all businesses based on number of employees.
Action 1E	Consider additional fees for street degradation, road improvements, rental registrations, and inspections.
Action 1F	Explore investment opportunities such as PLGIT for unrestricted fund balance.
Action 1G	Audit cable TV franchise fees to ensure maximum revenue.
Action 1H	Review fees for services regularly by continuing to enact an annual fee resolution.

GOAL 2: THE CITY WILL ENHANCE ITS ADMINISTRATIVE AND FINANCIAL MANAGEMENT CAPACITY.

UPDATE THE HOME RULE CHARTER The City's Home Rule Charter was adopted in 1995 and should be scheduled for a review and update at least every ten (10) years. There are certain outdated provisions in the Charter that cause the City unnecessary time, money, and resources that should be revisited

UPDATE THE ADMINISTRATIVE CODE Once the Charter is updated, it will be necessary to update the City's administrative code to be consistent with the changes to the Charter. Furthermore, the administrative code should be reviewed and updated regularly to keep it consistent with changing local practices and state law. For example, the City's administrative code sets a bid limit of \$18,500 for competitive bidding while the PA threshold set by the Department of Labor and Industry is \$23,200 and is adjusted every year based on the CPI

CREATE AN ASSISTANT MANAGER POSITION The City is a complex organization that provides a wide variety of services through the management of an \$8 million budget. The addition of an assistant manager's position would provide another layer of professional expertise for the City that an executive secretary position cannot provide. By adding a second professional management level position, the City could achieve better oversight of finance, planning and development, public works, sanitation, and personnel management. An assistant manager ensures legacy planning because he/she can be prepared for a future transition to the City Manager position.

PROVIDE PERSONNEL TRAINING OPPORTUNITIES FOR STAFF The public employment environment is complex and rapidly changing especially with the internet and social media. Handling these issues requires a high degree of training and experience so that matters can be addressed effectively and in accordance with public-sector employment law. Situations such as workers' compensation claims, disabilities, and long-term absences can be expensive if they are not addressed in an effective and expedient manner. In fact, the City's Charter requires a comprehensive personnel system based on merit and pre-established rules.

UPDATE THE EMPLOYEE HANDBOOK All local governments need an employee handbook to protect against a variety of risks and liabilities. A handbook will significantly reduce disputes with employees by ensuring that everyone knows and follows the established rules.

DIGITIZE RECORDS The City's codification through *eCode 360* is an excellent tool for the officials, departments, and public but it is only updated through September of 2022. But other record management challenges continue to rise for municipalities. The City could be more efficient in the storage of both electronic and paper files and the integration of each with regulatory standards consistent with the PA record retention schedule.

GOAL 2: THE CITY WILL ENHANCE ITS ADMINISTRATIVE AND FINANCIAL MANAGEMENT CAPACITY.

REMOVE TASKS FROM THE FINANCE DIRECTOR THAT ARE NOT RELATED TO THE FINANCIAL MANAGEMENT SYSTEM. The City needs a finance director that is completely focused on the financial management of the City to ensure timely and accurate reporting. It is impossible to make informed decisions without comprehensive financial reporting. Duties related to records management, Council support, and other administrative items should be reassigned to other staff members.

INSIST ON ADDITIONAL TRAINING AND SUPPORT FROM ACCUFUND Fund accounting is an accounting system for recording assets, liabilities, revenue and expenditures in separate funds as required by governmental standards. *AccuFund* has been used successfully by dozens of municipalities across the state, as a fund accounting system for municipal financial management systems. But it has been a struggle for the City staff due to lack of training and support. The City staff should dedicate the time and resources to ensuring that the software is working for all users and produces the monthly reports for decision-making purposes.

PRODUCE COMPREHENSIVE MONTHLY FINANCIAL REPORTS Monthly financial reporting should be a routine and required function of the finance operation as soon as bank reconciliation is completed but no later than the 10th of each month. Currently, the City staff are not providing timely reports for review by the manager and the Council inclusive of all funds and all accounting transactions.

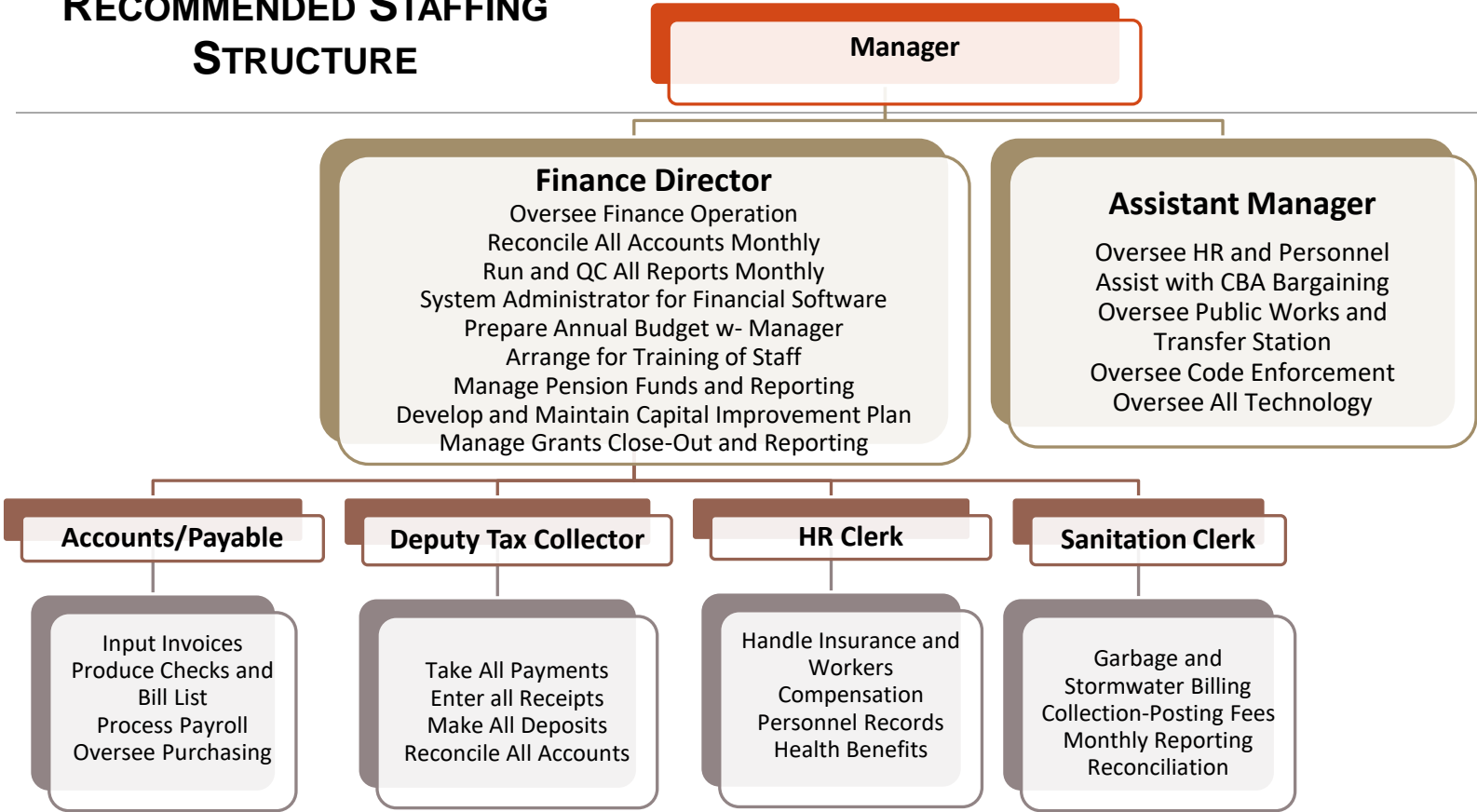
DEVELOP A FISCAL PROCEDURES POLICY There is no *Fiscal Procedure Policy* for the City's financial management system. Because of the limited staff and potential transition in key positions, the lack of written procedures could cause confusion and errors.

MAKE ENHANCEMENTS TO THE BUDGETING PROCESS The development of the annual budget sets the tone for the entire organization for the fiscal year. It is a policy statement about what programs and services will be provided as well as a decision about how resources will be allocated. The Council and manager should consider enhancements to the budget development process.

PREPARE A FIVE-YEAR CAPITAL IMPROVEMENT PLAN (CIP) The five-year CIP should be undertaken separately from the annual budget process and should include all projects with descriptions, estimated costs, estimated schedules, and identified revenue sources to support the projects and equipment. The CIP should be developed in conjunction with department directors, the City engineer, and key staff. The CIP should also identify the impact that each capital project will have on the operating budget for specific fiscal years. The annual capital budget should be based on the multiyear CIP.

GOAL 2: THE CITY WILL ENHANCE ITS ADMINISTRATIVE AND FINANCIAL MANAGEMENT CAPACITY.

RECOMMENDED STAFFING STRUCTURE



GOAL 2: THE CITY WILL ENHANCE ITS ADMINISTRATIVE AND FINANCIAL MANAGEMENT CAPACITY.

To meet this Goal, it will be necessary to:

Action 2A	Recruit and install a qualified Assistant Manager to oversee operations.
Action 2B	Recruit and install a qualified Finance Director to oversee the entire financial operation.
Action 2C	Budget and approve HR/personnel training – PELRAS annual training in State College.
Action 2D	Budget and approve financial management training – GFOA membership and conference.
Action 2E	Contract for the update of a comprehensive Employee Manual.
Action 2F	Contract for the update of the Administrative Code and the development and preparation of a Fiscal Procedures policy.
Action 2G	Contract for the preparation of a 5-Year Capital Plan.

GOAL 3: THE CITY WILL CONTINUE TO ANALYZE SOLID WASTE COLLECTION AND MODERNIZE THE TRANSFER STATION.

HIRE OR PROMOTE AN EMPLOYEE TO OVERSEE THE TRANSFER STATION OPERATION The transfer station is a business operation that requires a lot of attention. It is confined to one location and has its own equipment and functions that are relatively routine. A focused management level director would provide the necessary oversight for this important operation of public works that generates significant revenue for the City. A director that is focused on the transfer station could implement improvements to maximize the operation and plan for long-term upgrades and new technology.

REPLACE THE EXISTING SCALE AT THE TRANSFER STATION The current scale used at the transfer station requires a lot of manual actions and communication from the weighmaster inside the facility. Newer, modern scales have digital outdoor displays that can provide remote access that reduces staff hours. The current scale has reached its useful life and needs significant repairs and parts. The current scale is limited to 40' and should be upgraded to accept 80.' The tonnage is also limited – a new scale would increase tonnage limits. Fees can be adjusted to cover costs.

CONSIDER MODERN PAYMENT OPTIONS AT THE TRANSFER STATION The ability to scan checks, use Venmo or PayPal, use QR codes, and take credit card payments on-site would modernize the operation and make it more profitable. The City's bank does not currently have the capability for any of these options.

CONTINUE THE DETAILED EVALUATION OF SOLID WASTE AND RECYCLING The City is ahead of an expiring contract with its current hauler. Regional refuse rates have skyrocketed, and larger contracts have begun to limit the pool of interested bidders to only those large enough to already have the vehicles and manpower to take on larger or less geographically desirable contracts. The City should continue its comprehensive evaluation of its contract costs and performance including a market analysis. This study will result in a refined bid document that will be structured to bring more bidders to the table while aiming to keep rates reasonable for users.

DEVELOP AN OPTIONAL PLAN FOR IN-HOUSE SOLID WASTE AND RECYCLING COLLECTION The City was proactive in evaluating the market with a pre-bid of the solid waste and recycling contract. It revealed that the market is getting tighter and more costly. The City has an advantage over most communities in that it maintains its own transfer station that provides short-term drop off solution for haulers who can then transport to the landfill. Manpower and refuse vehicles would be the primary concern for an in-house program because refuse vehicles have a long lead time of nearly 24 months and solid waste workers are in short supply and high demand. If the City is going to consider moving this collection in-house, a more formal business plan should be developed as soon as possible to determine if this option is economically and practically feasible.

GOAL 3: THE CITY WILL CONTINUE TO ANALYZE SOLID WASTE COLLECTION AND MODERNIZE THE TRANSFER STATION.

To meet this Goal, it will be necessary to:

Action 3A	Hire or promote an employee to oversee and run the transfer station operation.
Action 3B	Purchase a digital scale that would increase tonnage limits. Fees can be adjusted to cover the cost of the improvements.
Action 3C	Implement the ability to scan checks, use Venmo or PayPal, use QR codes, and take credit card payments on-site to modernize the operation and make it more profitable.
Action 3D	Continue the comprehensive evaluation of the solid waste contract costs and performance including a market analysis. This study will result in a refined bid document that will be structured to bring more bidders to the table.
Action 3E	Engage an expert consultant to develop a comprehensive business plan to evaluate the costs and benefits of bringing the solid waste and recycling operation in-house.

GOAL 4: THE CITY WILL UPGRADE TECHNOLOGY IN ALL DEPARTMENTS

INSTALL CAMERAS AT THE CITY BUILDING, PUBLIC WORKS, AND FOR ALL INTERSECTIONS

Internet or closed-circuit camera systems provide an added layer of security for public places. Cameras installed inside facilities provide for another added level of security in the event of a perimeter or building breach. The City should have cameras installed at all buildings including the City Building, public works garage, park facilities and grounds, and at all intersections. There are systems that will operate on the same platform for viewing and that can store video on a schedule and override the data after a prescribed interval to limit the storage needs. Cameras at intersections that would be accessible to management staff would allow for remote monitoring of road conditions during inclement weather as well as provide observation of the status of the signal operation.

REPLACE HARDWARE THAT IS OUT OF WARRANTY - PLAN FOR WINDOWS 11 UPGRADES

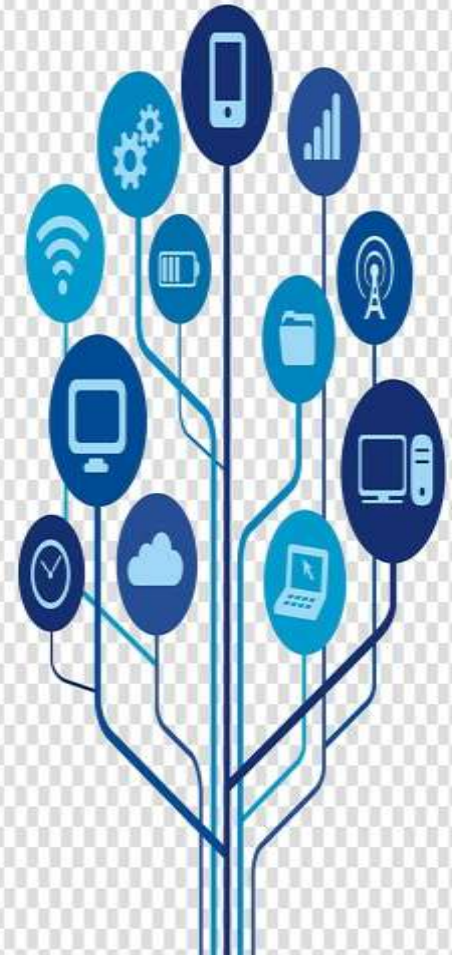
The City has been updating IT hardware that supports necessary applications for each user and department. Most of the desktop PCs have been upgraded to professional office accounts, however, the administration offices will need their hardware replaced as these machines are slowing down and out of warranty. It is recommended that machines be put on a replacement schedule and new PCs that are purchased have no less than i5 processors with 8GB RAM and 500GB SSD hardware. Hardware upgrades on a regular basis will ensure reliability and functionality for users. Machines that are running Windows 10 will no longer be supported after October 2025 and they will be vulnerable to system attacks and poor performance.

INSTALL BATTERY BACKUP DEVICES FOR ALL OFFICES

Battery backup devices help to maintain business activity when the power is interrupted or goes out completely. Desktop PCs and laptops that are not protected with battery backups will have a shorter life cycle and may experience data loss and complete failure prematurely because of a power surge. The City should consider battery backup devices for each office workstation.

INSTALL VOIP PHONES FOR PARKS AND FIRE DEPARTMENT

The City's current phone system needs to be updated across all City operations within the complex. The newest protocol for VOIP voice and data makes voicemails accessible via email and functionality of the handsets interface with cell phones. The area of the building that houses the Parks Commission offices as well as the Fire Department currently requires actual phone numbers to be dialed to reach those locations making it inconvenient, inefficient, and more costly to operate. These areas of the building do not follow the same protocols for voicemail or message forwarding. The City's VOIP system should be extended to those locations.



GOAL 4: THE CITY WILL UPGRADE TECHNOLOGY IN ALL DEPARTMENTS

UPDATE THE AUDIO/VISUAL EQUIPMENT IN THE COUNCIL CHAMBERS

The City would benefit from having a Council meeting room with updated audio and visual technology for presentations. Additionally, all departments benefit from having a training room where employees can train on-site and not have to travel. This room should be upgraded, and its use expanded so that all departments can use it as a City-wide training facility. A training room with adequate audio and visual components allows the City departments to host trainers and save money by being able to use their own equipment. It also allows for more intergovernmental hosting opportunities.

UPGRADE THE BUILDING ACCESS TO ELECTRONIC ACCESS CONTROL

The City facilities are not currently secured using electronic access. Managing facilities with electronic access control will ensure that facilities are able to be audited for access and secured from public interference. Remote access can be managed electronically and with schedules from a PC rather than hard-key locked.

ASSIGN MAINTENANCE OVERSIGHT OF THE WEBSITE

The City's website has undergone a recent update and provides valuable information to the public. The website is ADA compliant and has a user-friendly and attractive appearance. The site, however, needs regular content updates and active page links. Assigning department directors to manage and oversee their own pages is a common practice that requires accountability from the departments for information that is current and pages that remain active. Departments should be charged with this responsibility.



GOAL 4: THE CITY WILL UPGRADE TECHNOLOGY IN ALL DEPARTMENTS

To meet this Goal, it will be necessary to:	
Action 4A	Continually update IT inventory, replace equipment that is outdated, and implement the replacement plan for each department.
Action 4B	Upgrade hardware and software in every department based on the replacement plan.
Action 4C	Install cameras at City Building, street garage, parks, and intersections.
Action 4D	Replace hardware that is out of warranty/Plan for Windows 11 upgrades.
Action 4E	Install battery back-up devices for all offices.
Action 4F	Upgrade buildings access with keyless electronic control access.
Action 4G	Upgrade all policies related to the use of technology and social media.
Action 4H	Upgrade the meeting room audio and visual quality and technology – ensure the ability to conduct hybrid meetings (in-person and virtual).
Action 4I	Continuously plan for and implement technology that increases public access to local government services – use the website for this purpose.

GOAL 5: THE CITY WILL PREPARE AND ADOPT AN ANNUAL CAPITAL IMPROVEMENT PLAN (CIP) SUPPORTED BY FUNDING STRATEGIES.

The five-year CIP should be undertaken separately from the annual budget process and should include all projects with descriptions, estimated costs, estimated schedules, and identified revenue sources to support the projects and equipment. The CIP should be developed in conjunction with the City Manager, Department Directors, the City Engineer, and other key staff. The CIP should also identify the impact that each capital project will have on the operating budget for specific fiscal years. The annual capital budget should be based on the multiyear CIP.

Police Department

Equipment. Police equipment should be included in an equipment replacement schedule and updated on a regular basis. Items to be included in the CIP for routine replacement include:

- Video surveillance system at intersections with license plate readers.**
- Regular firearms replacement.**
- Hardware and software replacements.**

Vehicle Fleet. A vehicle replacement schedule should be developed and included in the CIP for police vehicles.

Facilities. Improvements to the facilities and equipment should be included in the CIP such as security cameras, evidence room upgrades, and electronic access for all City facilities.

Public Works

Pavement Management. The City should develop a long-range plan for paving and reconstruction of 7.6 miles of paved roads and alleys including sealcoating. A pavement management plan should be included in the CIP

GPS/GIS System. The City has many assets that are not included in the GIS system like guiderail, sewer laterals, park assets, streetlights, and the entire storm system. Purchasing GPS locating equipment, training staff in Public Works to collect the assets, and routinely updating the GIS data layers builds significant value for the City.

Vehicle Replacement Schedule. The City currently does not have a formal or informal vehicle replacement plan for any of its equipment and fleet operations. A vehicle replacement plan should be a part of a CIP

Improvements to the Transfer Station. The purchase of a digital scale and updated equipment should be considered to enhance productivity and increase revenue.

GOAL 5: THE CITY WILL PREPARE AND ADOPT AN ANNUAL CAPITAL IMPROVEMENT PLAN (CIP) SUPPORTED BY FUNDING STRATEGIES.

Technology

Website. The City's website was recently upgraded but municipal websites have begun migrating to more dynamic designs that are more responsive to the user and for mobile application.

Resident Notification. Community wide messaging systems can be installed at minimal cost to municipal operations. Residents can sign up on-line to receive text messages or emails concerning safety issues, community events, or information that the City broadcasts to its residents.

Facility Cameras. The City has limited camera access at its facilities. The City should consider upgrading all cameras to the same platform and insuring they are able to be recorded virtually. The City building interior and exterior, public works, police offices, salt storage facility, and park all are good candidates for this upgrade.

Hardware. It is recommended that machines be put on a replacement schedule and new PCs that are purchased have no less than i5 processors with 8GB RAM and 500GB SSD hardware. Hardware upgrades on a regular basis will ensure reliability and functionality for users.

Software. The City should consider land use - asset management software. Files should be migrated to Microsoft 365 with cloud storage on One Drive.

Battery Backup. Battery backup devices help to maintain power when the power is interrupted or goes out completely. Desktop PCs and laptops that are not protected with battery backups will have a shorter life cycle and may experience data loss and complete failure prematurely because of a power surge. The City should consider battery backup devices for each office workstation.

Electronic Access for City Facilities. Electronic access has become the standard for building control, allowing for building access audits to be performed, access to be controlled by device and user permissions to be managed and changed with ease. The park, public works, City building, police station, and fire departments are all good candidates for an upgrade to electronic access.

Emergency Generator – The City operation should be supported by an emergency generator during emergency events so that critical services can continue to be provided to residents.

GOAL 5: THE CITY WILL PREPARE AND ADOPT AN ANNUAL CAPITAL IMPROVEMENT PLAN (CIP) SUPPORTED BY FUNDING STRATEGIES.

Recommended Process for Development of Capital Improvement Plan (CIP)

STEP	LEAD	ACTION	NO LATER THAN
1	Manager/Secretary	Assist Department Heads and Engineer to develop required schedules for facilities, infrastructure, equipment, and technology	On going
2	Manager/Secretary Department Directors City Engineer	Conduct field inspections, inventory	March 31
3	Department Directors	Create vehicle and equipment replacement schedules	March 31
4	Department Directors Manager/Secretary	Submit Project Request Forms	April 30
5	Manager/Secretary	Prepare capital project list to be reviewed by Finance Committee	May 15
6	Finance Committee Manager/Secretary	Evaluate and Rank capital projects – facilities, infrastructure, equipment, technology	May 31
7	Finance Committee	Identify and Source Funds	June 30
8	Manager/Secretary Finance Committee	Prepare CIP document with spreadsheets and narrative	July 15
9	Manager/Secretary	Submit Plan to City Council for Consideration and Adoption	August 1

GOAL 5: THE CITY WILL PREPARE AND ADOPT AN ANNUAL CAPITAL IMPROVEMENT PLAN (CIP) SUPPORTED BY FUNDING STRATEGIES.

To meet this Goal, it will be necessary to:	
Action 5A	Conduct an inventory of facilities, infrastructure, technology, and equipment. Assess conditions, assign estimated costs, and develop replacement schedules.
Action 5B	Update the CIP with narrative, schedule, costs, and five-year schedule for expenditures each year. Include detailed information regarding facility upgrades, infrastructure planning, park projects, technology, and equipment purchases for the departments.
Action 5C	Include a space analysis for improvements to the City facilities.
Action 5D	Contract with a vendor for a pavement management study ; consider dedicated real estate tax millage to support the long-term pavement management plan.
Action 5E	Include improvements for the City Building, parks, public works, fire department, and other facilities as part of the CIP.
Action 5F	Include regular upgrades to technology for development of the CIP.
Action 5G	Utilize county, state, and federal funding sources, and schedule meetings with legislators and funders to provide support and influence for funding projects.

STEP 6 MULTI-YEAR IMPLEMENTATION STRATEGY

The STMP program assumes a dynamic renewal process, and should be reviewed, evaluated, adjusted, and adopted each year. Any successful implementation of a plan requires the involvement of the strategy formulators and key staff who will be charged with the implementation. It is essential that officials, manager, department directors, and key staff members are involved in the implementation process and stay engaged as the implementation moves forward. The following management issues are central to a successful implementation process:

Step 1. Identify High-Priority Goals – In Step 5, the top-five priority goals are identified. These goals are based on the most important critical factors for the success and sustainability of the City organization. The prioritization of the goals for the City focus on sustainability and community resilience and the best strategies for advancing:

- Economic health
- Livability
- Environmental quality
- Social equity

Step 2. Develop Action Items – In Step 5, the action items associated with each goal and a schedule for completing each action item are identified.

Step 3. Establish Annual Goals – Establishing annual objectives will assist the City with the implementation process. The purpose of establishing annual objectives is to provide the following:

- Guidelines for actions and efforts
- Justification to stakeholders for activities
- Standards of performance
- Source of employee motivation
- Basis for organizational design

Step 4. Assess Structure – Changes in strategy sometimes require changes in organizational structure, because structure often dictates how policies will be established and how resources will be allocated. It is therefore important to determine if organizational structure changes are necessary to pursue new strategies. In Latrobe, several structural changes are recommended including the added capacity for financial management and the expansion of zoning officer duties and activities.

IDENTIFY HIGH
PRIORITY GOALS

DEVELOP ACTION
ITEMS

ESTABLISH
ANNUAL GOALS

ASSESS
STRUCTURE

IDENTIFY
RESOURCES

DEVELOP
EVALUATION
PROCESS

MEASURE
PERFORMANCE

TAKE CORRECTIVE
ACTION

STEP 6 MULTI-YEAR IMPLEMENTATION STRATEGY

Step 5. Identify Resources – Many organizations spend time, money, and effort in developing a plan, but little thought or commitment of resources to the implementation of the plan. The City Manager and the Council should work with staff to identify the resources that are necessary to implement the Plan and to develop a funding strategy that identifies and accesses those resources.

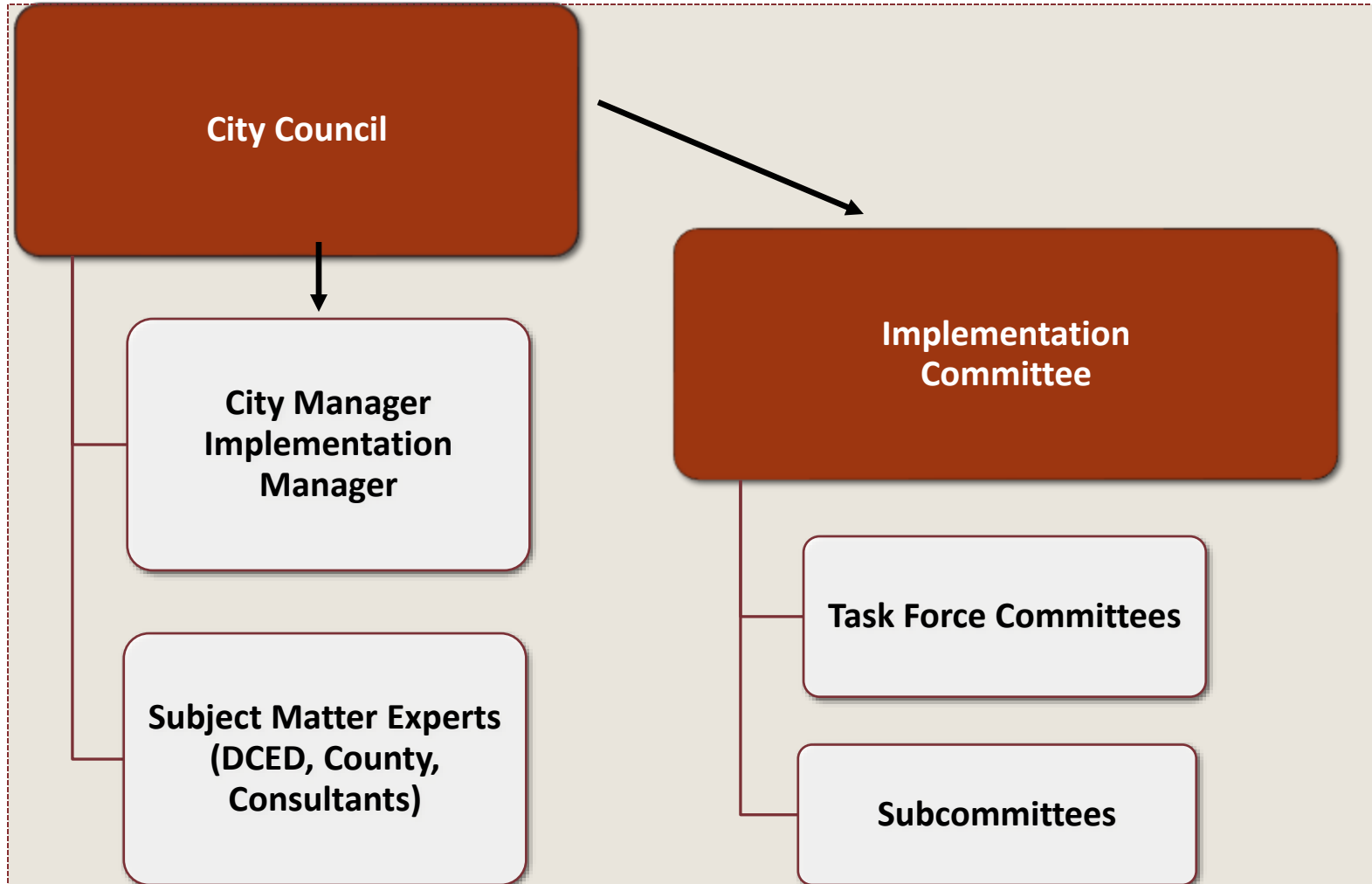
Step 6. Develop an Evaluation Framework – The person assigned as an Implementation Manager for the STMP plan should work with the City Council and staff to develop a strategy-evaluation assessment matrix that identifies, for each strategy, whether major changes have occurred in the City’s internal and external position and whether the City’s organization has made progress in satisfactorily meeting stated objectives. Strategy evaluation should be designed to provide a true picture of what is happening in the organization. For this reason, qualitative evaluations should also be built into the process. This will inform the City Council and management as to what corrective action, if any, must be taken.

Step 7. Measure Organizational Performance – The Implementation Manager should work with Committees to develop appropriate performance measures based on stated objectives for the priority strategies. Quantitative criteria that are commonly used are (1) comparing the selected factors over time, (2) comparing the City’s operations to its competitors or benchmark communities, and (3) comparing the department’s performance to statewide or national standards. Qualitative factors that should also be considered are turnover and absentee rates, quality of the services, and employee satisfaction.

Step 8. Take Corrective Action – This activity is targeted toward making the changes that can reposition the City organization to achieve sustainability and resilience for the future. During this phase, the Implementation Manager should assist the City in analyzing organizational structure, reviewing organizational performance, or revising the organization’s mission. Corrective actions should be designed to capitalize on strengths, take advantage of key external opportunities, avoid or mitigate threats, and improve internal weaknesses.



STMP IMPLEMENTATION STRUCTURE FOR SUCCESS



STEP 6 MULTI-YEAR IMPLEMENTATION STRATEGY

- ❑ Identify high priority items and assign them to a Committee.
- ❑ Identify additional stakeholders and subject matter experts.
- ❑ Schedule meetings for action items.
- ❑ Identify action items from the priority goals that should be addressed during the first year.
- ❑ Organize task forces to assist the Implementation Manager.
- ❑ Build additional capacity through volunteer recruitment.
- ❑ Conduct a regular evaluation of the progress on action items.
- ❑ Take corrective action as necessary to address deficiencies.



STEP 6 MULTI-YEAR IMPLEMENTATION STRATEGY

Resource allocation is a central management activity that supports strategy implementation. Without a planned approach to resource allocation, decisions are often made based on political preferences or personal beliefs. In a strategically planned environment, resources will be allocated based on priority goals and established annual objectives. The success of implementation will be directly related to the consistency of the resource allocation with the priorities that are identified in the approved Plan.

Challenges to Implementation

Resources in organizations are often not allocated effectively because of the reasons below:

Leaders are overprotective of resources. Many elected officials, in principle, are adamantly opposed to any investment of additional resources in the development of organizational capacity, especially in the areas of training and professional development. This leads to short-term savings and long-term bankruptcy.

The focus is on short-term liquidity instead of long-term financial health. Often, in order to achieve long-term sustainability, it is necessary to invest in professional staff, subject matter experts, and strategic vision planning processes. In many local government organizations, these activities are not accorded the value they deserve.

Decisions are made based on political orientation. When the resource allocation is based on the political support in the community, the proper attention is diverted from high-priority goals and projects to addressing the immediate “hot issue” items in the community.

Targets and objectives are too vague. Planning and annual objectives should be very specific, with performance measurements identified.

Leaders are reluctant to make changes or take risks. Most organizations are resistant to change. Any change in structure, technology, personnel, or practices raises anxiety levels in an organization. Change should be viewed as a continuous process and an opportunity to improve the quality of the organization and the services it provides.

Leaders lack sufficient knowledge about what should be done. Because the nature of local government leadership is naturally transient, leaders are sometimes unsure or uninformed about how resources should be allocated to advance organizational priorities. Likewise, the priorities are often not adequately communicated to key staff in the organization who are responsible for the organization and utilization of resources.

STEP 6 MULTI-YEAR IMPLEMENTATION STRATEGY

The Implementation Manager should identify and analyze potential funding sources available for eligible costs associated with the City's projects. A detailed matrix outlining resources available for the projects should be prepared and used to develop a comprehensive funding strategy. Utilizing the action plans in Step 5 the Implementation Manager should prepare detailed briefing books and message statements for each of the priority projects. Funding opportunities include:

- **FY 2024 Department of Justice (DOJ) Community-Oriented Policing Services (COPS) Appropriations** – The annual DOJ development appropriations legislation provides funding for costs related to public safety improvements. This opportunity involves direct contact with congressional staff and allows for the potential to address public safety for projects.
- **Redevelopment Assistance Capital Program (RACP)** – Pennsylvania's RACP supports larger development projects that have a total project cost more than \$1 million. The governor typically announces competitive application opportunities each year. These grants are 50-50 matches.
- **Business in Our Sites (BOS)** – Pennsylvania's BOS grants and loans focus on infrastructure and site preparation costs that transition undeveloped sites to "shovel-ready" sites. Although funding for this program is very limited, funds become available from time to time and there have been discussions in the General Assembly about recapitalizing the program as part of the next state budget.
- **Pennsylvania Infrastructure Bank (PIB)** – PIB is a program developed by the Pennsylvania Department of Transportation (PennDOT) that offers low-interest loans (one-half of prime) for transportation improvements. The loans can be repaid with federal funds. PIB is especially helpful in accelerating phases of transportation projects that must move at a pace that may not coincide with the timeline for delivering federal funds.
- **Foundation Programs/Funding** – A review of potential foundation resources should be undertaken to determine support for components of the projects that are candidates for funding. Resources such as senior centers and other public services may increase the opportunity for foundational support.
- **Pennsylvania State Energy Funding** – Energy independence programs offered through multiple agencies, including the Department of Environmental Protection (DEP), DCED, and the Commonwealth Financing Authority (CFA), may provide potential sources of funding.
- **Pennsylvania Department of Conservation and Natural Resources (DCNR) Community Conservation Partnerships Program (C2P2)** – This program funds both planning and development parks and recreation grants that would support several of the recommendations in the STMP. The annual application is due in April of each year.
- **Community Development Block Grant (CDBG) Program** – Projects that could be undertaken with CDBG funds include water, sewer, and road projects; demolition of vacant and/or unsafe structures; acquisition of blighted property; handicap ramps at intersections; and handicap-accessible pedestrian walkways at parks or restrooms. The City has used these funds in the past for projects.

STEP 6 MULTI-YEAR IMPLEMENTATION STRATEGY

- **Marcellus Shale Act 13 Funds** – The Act 13 funds can be used for projects such as the acquisition of key properties (land and buildings); rehabilitation of buildings; site preparation for public uses; parks and recreation projects; and other economic development projects. Applications are accepted by agencies at various times of the year.
- **PennDOT Enhancement or Pennsylvania Community Transportation Initiative (PCTI)** – Enhancement funds and PCTI funds are made available through PennDOT for projects that address the quality of life in a community, such as safer pedestrian-oriented linkages, traffic calming, re-signalization, and reconfiguration of intersections.
- **Greenways, Trails, and Recreation Program (GTPR)** – These funds, up to \$250,000, are available through the Commonwealth Financing Authority for planning, acquisition, development, rehabilitation, and repair of greenways, recreational trails, open space, parks, and beautification projects.
- **PA Small Water and Sewer Program (CFA)** – These funds, up to \$500,000 are provided for activities to assist with the construction, improvement, expansion, or rehabilitation or repair of a water supply system, sanitary sewer system, storm sewer system, or flood control projects.
- **Growing Greener Plus Program (DEP)** - The primary purpose of this program is to restore impaired waters and protect waterways from nonpoint source pollution within the Commonwealth. This grant can be used for implementing best management practices for the MS4 regulations and for TMDL planning and controls.

In addition, the **PA DCED Governor's Center for Local Government Services (GCLGS)** is a one-stop shop for local [government officials](#) and provides a wealth of [knowledge](#) and expertise on all matters affecting local government operations throughout Pennsylvania. The services and publications provided can be viewed and downloaded at www.dced.pa.gov.

The Implementation Manager should provide advice and recommendations related to the following: (1) eligibility requirements related to each program; (2) assumptions regarding the proposed use of funds and consistency with program eligibility and compliance requirements; (3) structuring of funding uses and match requirements to promote efficiency while meeting program requirements; and (4) potential to supplement funding sources.



STEP 6 MULTI-YEAR IMPLEMENTATION STRATEGY

○ Financial

- Include resources in the annual budget for implementation action items
- Develop a funding matrix with potential funding sources
- Use the Capital Improvement Plan for including longer term resources

○ Physical

- Ensure that working conditions and facilities are designed to enhance employee performance
- Use physical conditions of facilities to create a positive image

○ Human

- Recruit and hire personnel with the requisite skills and experience to ensure quality services
- Build political support in the region and at the county and state levels for projects

○ Technology

- Install technology that supports and enhances the quality of services for residents

CONCLUSION

The City of Latrobe has a long and proud history as a thriving small city in Westmoreland County. With a densely populated, urban character, and a legacy of industrial opportunities, the City is involved now in mostly redevelopment activities. Latrobe is lucky to be home to over 8,000 residents who are engaged and energized to invest in the community's long-term sustainability.

The City currently generates sufficient revenue to support its operation. But it will become increasingly difficult to continue to support full services without monitoring and enhancing revenue generation. The City is committed to providing quality services and operational and financial responsibility for its residents.

Compensation, benefits, energy, and rising healthcare costs will continue to drive overall costs. Benefit costs will continue to rise by at least 5% per year over the next several years. However, installing strong financial management processes, right-sizing staffing and service levels, and investing in training and technology, the City should see a favorable cash position over the next five years. This will require regular monitoring and vigorous financial oversight with accurate and timely reporting.

The City has taken positive steps to enhance its revenue collection, pursue delinquencies, seek alternative revenue sources, and limit its costs for healthcare and benefits. If the City officials continue to address the revenue problems and to engage in serious cost containment, the City should be able to maintain a stable financial position and to begin to plan for long-term capital and infrastructure improvements.

Implementation of the STMP Plan recommendations for revenue enhancement, cost containment, financial management improvements, stabilization of government, technology initiatives, blight and vacant property strategies, and CIP development must become a priority. With responsible oversight by the decision makers, continued support of professional management, and constant attention to the City's financial condition, the City could experience a stable financial situation and long-term sustainability.



Thank You

Thank you for the opportunity to serve you!

Grass Root Solutions Team

*Deborah Grass
Tricia Levander
Jason Dailey
Robert Johnson*

*Project Manager
Financial Consultant
Operations Consultant
Police Consultant*

Grass Root Solutions 1506 Greenmount Avenue, Pittsburgh, PA Phone: 412-980-4303 dgrass1506@hotmail.com

APPENDIX A – RECOMMENDATIONS

GENERAL GOVERNMENT

RECOMMENDATION 1 – UPDATE THE HOME RULE CHARTER.

The City's Home Rule Charter was adopted in 1995 and should be scheduled for a review and update at least every ten (10) years. There are certain outdated provisions in the Charter that cause the City unnecessary time, money, and resources. The update to the Home Rule Charter can be achieved through a City Council appointment of an ad hoc Committee that would review and recommend changes to the Charter. The proposed changes would be adopted by the City Council by ordinance and provided to the Westmoreland County election bureau so that the referendum questions can be placed on the ballot of either a primary or general election for voter approval. If the referendums are approved, the Charter would be adjusted accordingly.

RECOMMENDATION 2 – UPDATE THE ADMINISTRATIVE CODE

Once the Charter is updated, it will be necessary to update the City's administrative code to be consistent with the changes to the Charter. Furthermore, the administrative code should be reviewed and updated regularly to keep it consistent with changing local practices and state law. For example, the City's administrative code sets a bid limit of \$18,500 for competitive bidding while the PA threshold set by the Department of Labor and Industry is \$23,200 and is adjusted every year based on the CPI.

RECOMMENDATION 3 – CONSIDER REDUCING THE NUMBER OF COUNCIL SEATS

A recent study identified dozens of vacant Council seats across the Commonwealth because residents are too busy or too disinterested to serve on governing bodies. The study also found that smaller governing bodies are more efficient and effective in promoting cohesion, flexibility, and effective participation by members to achieve governance objectives.

Having 7 Council members made sense when the population was over 11,000 people but with a population of 8,000, the Council could be reduced to a five (5) member Council that includes a mayor and four (4) council members. This could be achieved by placing a question on the ballot (either at the general or primary election) to amend the Charter. Sitting council members would serve their full terms, and the new structure would not take effect until a date certain in the future.

RECOMMENDATION 4 – CONSIDER CREATING AN ASSISTANT MANAGER POSITION

The City is a complex organization that provides a wide variety of services through the management of an \$8 million budget. The addition of an assistant manager's position would provide another layer of professional expertise for the City that an executive secretary position cannot provide. By adding a second professional management level position, the City could achieve better oversight of finance, planning and development, public works, sanitation, and personnel management. An assistant manager ensures legacy planning because he/she can be prepared for a future transition to the City Manager position.

RECOMMENDATION 5 - PROVIDE PERSONNEL TRAINING OPPORTUNITIES FOR STAFF

The City employees are the most valuable assets in the City organization. Like most communities, the largest

expenditure in the City's budget is personnel and related items. The personnel environment is complex and rapidly changing especially with the internet and social media. Handling these issues requires a high degree of training and experience so that matters can be addressed effectively and in accordance with public-sector employment law. Situations such as workers' compensation claims, disabilities, and long-term absences can be expensive if they are not addressed in an effective and expedient manner. In fact, the City's Charter requires a comprehensive personnel system based on merit and pre-established rules.

The city manager, department directors, and staff who handle human resource management should have access and attend personnel management training. One such opportunity is the annual public employee training sponsored by the Public Employee Labor Relations Advisory Service (PELRAS) and supported by the PA Municipal League (PML) and the Association for PA Municipal Managers (APMM), held in State College in March of each year. This training focuses on personnel related and collective bargaining matters. There are also other opportunities for training each year through the Local Government Academy (LGA), the Association of PA Municipal Managers (APMM), and the PA-Government Finance Officers Association (PA-GFOA).

RECOMMENDATION 6 – DEVELOP AND ADOPT AN EMPLOYEE HANDBOOK

All local governments need an employee handbook to protect against a variety of risks and liabilities. A handbook will significantly reduce disputes with employees by ensuring that everyone knows and follows the established rules. The handbook should include among other things:

- General employment statutes and legally mandated regulations

- Compensation and benefit policies including payroll, sick leave, paid time off, overtime, benefits, breaks, and jury duty.
- Harassment and discrimination policies.
- Work rules, workplace conditions, and policies
- Standards of conduct
- Computer use and social media policies.
- Disciplinary process

Schedule periodic updates and training for all employees to ensure that the policies are understood and carried out.

RECOMMENDATION 7 – DIGITIZE RECORDS

The City's codification through *eCode 360* is an excellent tool for the officials, departments, and public but it is only updated through September of 2022.

But other record management challenges continue to rise for municipalities. The City could be more efficient in the storage of both electronic and paper files and the integration of each with regulatory standards consistent with the PA record retention schedule. Records must also be available for retrieval for "right to know" requests. The move to a paperless environment should be a priority for the City.

FINANCIAL MANAGEMENT

RECOMMENDATION 8 – REMOVE TASKS FROM THE FINANCE DIRECTOR THAT ARE NOT RELATED TO THE FINANCIAL MANAGEMENT SYSTEM.

The City needs a finance director that is completely focused on the financial management of the City to ensure timely and accurate reporting. It is impossible to make informed decisions without comprehensive financial reporting. Duties related to records management, Council support, and other

administrative items should be reassigned to other staff members.

The finance director should have a strong governmental accounting background and should be knowledgeable and a member of GFOA. The director should be responsible for the oversight of all City funds, capital planning, and administration of the pension system. With a dedicated finance director, the City could begin to address financial management internal controls that are not currently in place.

RECOMMENDATION 9 - PROVIDE FUNDING FOR TRAINING

The City operation is currently supported by an \$8 million annual operating budget. In order to protect the assets and resources of the City (both human and capital), it is important that the City have a financial management system that meets *Generally Accepted Accounting Principles (GAAP)* and that management of the financial system is vested with employees who have the authority and training to act accordingly. In order to further enhance and protect the City assets, the City should sponsor membership in GFOA and provide training allocations for the finance director to attend the annual conference and to participate in training opportunities.

RECOMMENDATION 10 – INSIST ON ADDITIONAL TRAINING AND SUPPORT FROM ACCUFUND

Fund accounting is an accounting system for recording assets, liabilities, revenue and expenditures in separate funds as required by governmental standards. It emphasizes accountability rather than profitability and is used by governmental agencies of all sizes. In this method,

a fund consists of a self-balancing set of accounts, and each is reported as either unrestricted, temporarily restricted, or permanently restricted for specific purposes based on legally imposed restrictions. *AccuFund* has been used successfully by dozens of municipalities across the state, as a fund accounting system for municipal financial management systems. But it has been a struggle for the City staff due to lack of training and support. The City staff should dedicate the time and resources to ensuring that the software is working for all users and produces the monthly reports for decision-making purposes.

RECOMMENDATION 11 – PRODUCE COMPREHENSIVE MONTHLY FINANCIAL REPORTS

Monthly financial reporting should be a routine and required function of the finance operation as soon as bank reconciliation is completed but no later than the 10th of each month. Currently, the City staff are not providing timely reports for review by the manager and the Council inclusive of all funds and all accounting transactions. Monthly reports should include but not be limited to the following information:

- **BUDGET TO ACTUAL COMPARISON REPORT** – Report that compares budgeted revenues and expenditures to actual revenues and expenditures for every category and line item for each of the funds.
- **SUMMARY BALANCE SHEET REPORT** – Report that shows the assets, liabilities, and fund balance for every municipal fund reconciled to the bank statements.
- **CASH FLOW ANALYSIS** – Report that compares cash flow in the current fiscal year to previous year(s) and identifies what the actual availability of cash is estimated to be by month and at year-end.

RECOMMENDATION 12 – DEVELOP A FISCAL PROCEDURES POLICY

There is no *Fiscal Procedure Policy* for the City's financial management system. Because of the limited staff and potential transition in key positions, the lack of written procedures could cause confusion and errors.

RECOMMENDATION 13 – MAKE ENHANCEMENTS TO THE BUDGETING PROCESS

The development of the annual budget sets the tone for the entire organization for the fiscal year. It is a policy statement about what programs and services will be provided as well as a decision about how resources will be allocated. The Council and manager should consider the following enhancements to the budget development process:

- Distribute *budget worksheets* to department directors that include at least three years of prior financial data. A historical analysis of revenues and expenditures will improve the ability for making accurate budget projections.
- Use a *budget calendar* that is published and distributed within and outside of the City organization and placed on the City's website. The calendar enables people who are involved in the budget process (the Council, the department directors, and the agencies) to plan accordingly for workshops, public presentations, and adoption of the final budget. It also provides the public with the ability to participate in the process and to provide public comments in a timely manner. Finally, it keeps the process focused and on target to meet the legal requirements of

advertisement, publication, public inspection, and adoption.

- Schedule several public *Budget Workshops* so that the budget can be explained in plain language, and the Council can receive comments from the citizens.
- Include a complete *analysis of cost* prior to any new planned hire in any department. The City's personnel costs make up about 80% of the overall budget. For this reason, it is critical to evaluate every position prior to Council approval of a new hire. The analysis should include not only starting costs but projected benefit and pension costs over the entire employment period, with adjustments for estimated inflation rates.
- Prepare and include a *budget message* in plain language that accompanies the initial presentation of the budget to the Council and the public for preliminary review. The budget message should include areas of financial concern such as a reduction in revenues, the need for a tax rate increase, or changes to staffing or service levels. The budget document itself should be presented in a format that is clearly understandable to officials, the public, and the media.

Once the budget has been adopted, it should be used to control spending. The manager and finance director should monitor, measure, and evaluate the following:

- *Program performance* – How well is the City doing in reaching its program goals and objectives?
- *Budgetary Performance* – How well are actual revenues, expenditures, cash flows, and fund balances staying within budget?

- *Financial Condition* – What is the long-term health of the City, including the community’s general social, demographic, and economic conditions?
- *External Factors* – What changes have occurred that can have an impact on performance?

RECOMMENDATION 14 – INVOLVE DEPARTMENT DIRECTORS IN THE BUDGET PROCESS

The finance director, police chief, fire chief, code enforcement officer, and public works director should be involved in the development of the budget, and they should be held responsible for working within the confines of the budget limits. The departments should be held accountable for budget overruns and should be required to justify expenditures that are not routine or ordinary. Any items requested for the new budget year should have a complete analysis of cost (initial and maintenance), a statement of need, supporting data, the volume and nature of the work performed, benefits to be achieved, and justification for the purchase. Any proposed new revenue items or revenue enhancements should be encouraged and fully explored by the department directors and relevant staff.

RECOMMENDATION 15 – PREPARE A FIVE-YEAR CAPITAL IMPROVEMENT PLAN (CIP).

The five-year CIP should be undertaken separately from the annual budget process and should include all projects with descriptions, estimated costs, estimated schedules, and identified revenue sources to support the projects and equipment. The CIP should be developed in conjunction with department directors, the City engineer, and key staff. The CIP should also identify the impact that each capital project

will have on the operating budget for specific fiscal years. The annual capital budget should be based on the multiyear CIP.

RECOMMENDATION 16 – BUILD-IN ADDITIONAL OVERSIGHT OF FINANCIAL MANAGEMENT ACTIVITIES.

With limited staff, it is very difficult to have segregation of duties in the financial operation creating the perception that there could be mismanagement or fraud. But it is possible to have some limited oversight of the daily financial transactions by adding some reviews and signoffs for financial transactions. The following procedures are recommended:

- The manager should review the payroll register and sign it before checks are issued.
- The manager should review the quarterly payroll withholding tax payments to ensure that they are being made by the City appropriately.
- The Council should review the bill list and sign it after the Council approves it each month.
- Receipts should be pre-numbered and not be taken by the same person who records the information into the accounting system.
- Deposits should not be made by the same person who writes and records receipts.
- Checks should be prepared by the accounts payable clerk for approved invoices and signed (live signatures) by the manager, mayor or their designees as provided in the Charter.
- The real estate tax account fund should be examined and audited regularly. As the largest revenue source, this fund provides the highest potential for theft or mismanagement.
- The independent auditor should file the DCED annual financial report by April 1 as required by law.

RECOMMENDATION 17 – IMPLEMENT A FORMAL PURCHASE ORDER PROCEDURE.

A purchase order system should be designed and implemented requiring the finance director to approve purchases up to a certain threshold limit and to require other purchases to be approved by the manager in advance of the purchase. This policy should ensure the cost, quality, and delivery of products and services used by the City.

POLICE DEPARTMENT

RECOMMENDATION 18 – REVIEW ALL EXPENDITURES REGULARLY WITH MANAGEMENT.

The chief of police and the city manager should closely review the department’s budget and determine what if any adjustments can be made. The areas that require the most scrutiny are the line items for: overtime wages, the K9 team, and LIVESCAN/CPIN expense. As discussed overtime has increased by nearly 53% from 2020 to 2023. Also, the reported activity for the K-9 team doesn’t support the expense and liability that are incurred for the City. (See Recommendation 23) It should also be determined if LIVESCAN/CPIN is operationally necessary given its expense. This can be determined by requesting the total number of prints submitted for the terminal annually through PSP CLEAN. Many local agencies have eliminated this expense following the implementation of central booking centers or in the case of Westmoreland County the park police offer this service free of charge.

RECOMMENDATION 19 – ADJUST STAFFING TO INCREASE PATROLS AND CLEARANCE RATES.

There are currently fourteen (14) budgeted full-time positions within the department, not including the chief’s position.

Typically, eleven (11) personnel and on occasion, the chief, are responsible for providing police coverage 24/7 nine (9) months out of the year as the SRO’s are dedicated to their assigned districts during the school year. *[NOTE: The CSO position is non-sworn and is not included in the budgeted police positions.]*

The current CBA requires a minimum of two officers on each shift which is a reasonable shift requirement in a small police department. Often, the chief or one of the detectives serves as the second officer on the shift to provide the mandated coverage.

The use of the detective sergeant and detectives in this manner directly impacts the ability of this unit to conduct proper investigations that result in arrests (clearances). This is clearly evidenced by the lower-than-average clearance rate for the department. The low clearance rate is not an indictment of the detectives but is caused by the staffing level that consistently requires the unit to respond to basic patrol-related calls.

It is recommended that the scheduling practice of utilizing the detective sergeant and detective to fulfill the staffing obligations of the CBA be ended as soon as practicable by adding additional personnel to the overall complement. Additional staffing would address but not eliminate the

detective sergeant or detective from contributing during periods of minimal staffing.

The proposed budget for 2024 has a separate line item for a captain with a salary of \$99,000. The chief created this position to place a layer of supervision between himself and the sergeants. This position is expected to assume more of the administrative duties currently being undertaken by the sergeants.

But - the biggest issue facing the police department is the number of budgeted patrol positions, not the number of supervisory positions. The recommended supervisory span is from three (3) to seven (7) personnel per supervisor with five (5) being optimal. In Latrobe, each sergeant, except for the detective sergeant, is responsible for three (3) patrol officers. The detective sergeant supervises four (4) total. The current staffing structure (without the captain) represents sufficient and appropriate supervisory positions. But it is recommended that the budgeted number of officers be increased to sixteen (16) sworn officers without the addition of the captain position to allow for more patrolling and investigations.¹

[NOTE: Assuming the budgeted expenditure for overtime in 2024 of \$95,000 is combined with the \$99,000 budgeted salary for the captain position a total of \$194,000 would be available for wages. Two entry level positions for patrol officers would cost \$110,394 plus benefits and would leave \$83,605 available for overtime wages.]

¹ During the period of this review, the captain position was added to the department.

RECOMMENDATION 20 – IMPROVE CLEARANCE RATES.

Low clearance rates are indicative of insufficient investigations, insufficient training, or a lack of supervision. The clearance rate for the department was the lowest of the comparable cities captured in **Table 4**. During a follow-up interview with the chief, he reported that clearance rates for the past three (3) months were between 80 -95%. The increase was attributed to greater supervisory oversight and setting clear expectations for personnel. It is recommended that continual oversight is necessary to maintain a higher clearance rate.

RECOMMENDATION 21 – DEVELOP AND ENFORCE A POLICY REGARDING REPORT SUBMISSION.

A disparity of about 30% to 45% existed between the number of calls for service received by the 911 Center and the number of reports entered into the RMS platform in 2022 and 2023. A new policy that dictates which calls for service require report submission has been enacted by the Chief. It is recommended that the chief periodically review the number of calls for service at the 911 center against the number of reports completed in the RMS system.

RECOMMENDATION 22 – LIMIT THE USE OF DETECTIVES FOR PATROL.

The detective sergeant is routinely assigned to the patrol function due to existing staffing levels and mandates in the CBA that require a minimum of two (2) officers on a shift. Consideration should be given to not assigning this position

to the patrol function unless necessary. This practice would result in better investigations that ultimately lead to higher clearance rates. Redefined use of this position in this manner may also eliminate the need for a juvenile officer.

RECOMMENDATION 23 – DETERMINE IF THE K9 UNIT IS NECESSARY. [IN JUNE OF 2024, THE K-9 UNIT WAS ELIMINATED AFTER CAREFUL REVIEW AND DISCUSSIONS WITH MANAGEMENT.]

The Chief should review the K9 program and policy in its entirety and determine if it is needed. According to the CBA, the City may at any time discontinue the K9 unit, without prior notice or approval of the bargaining unit.

Discontinuance of the unit by the City is not a subject of grievance arbitration or an unfair labor practice but considered to be a management decision.

According to the K9 handler, the team trains one day a week except holidays, vacation, or sick leave. Based on this information, the team is taken off the schedule a minimum of forty (40) days a year just for training. This is a considerable burden on the schedule given existing staffing levels. This does not account for the compensatory day off the handler receives every month as governed by the CBA. One K-9 handler position accounts for fifty-two (52) empty shifts annually that require overtime.

As shown in **Table 6** the number of training record reports entered is eleven (11) for the review period. Based on the information from the K9 handler, there should be 160 training records. Any training that occurs with the team should be mandated to be documented in the RMS system in addition to any records that are created during training.

This lack of documentation is problematic because the single biggest defense in civil litigation involving police K9 units is training that is properly and appropriately documented. Certifications are of little consequence without proper training documentation.

K9 deployment records are also lacking. Based on the information provided by the K-9 handler, there should be approximately 486 records for deployments during the review period, but the RMS system details only thirty (30). Any time the K9 is deployed, it should be mandated that a report is generated on the RMS platform with a separate K9 report.

Given the enormous impact of the K-9 team to the schedule, budget, and liability to the City; significant review of this program is recommended to determine the need for this specialized asset.

RECOMMENDATION 24 – EVALUATE THE ESCALATING OVERTIME INCREASES

There are several factors affecting the escalating overtime expense. First and most importantly, there are 287 unscheduled shifts annually due to contractually obligated leave under the CBA. There is also overtime associated with specialized positions such as the K-9 team, detectives, and school resource officers. Finally, there seems to be “pyramiding” by officers where overtime is being paid twice for the same overtime event.

The only way to control these practices is for more oversight and control by the chief and by the city manager. It is strongly recommended that management conduct a comprehensive review of leave usage and associated

overtime during those leave periods. If “pyramiding” is occurring it is a clear violation of the CBA, Article VI – Overtime Pay, Section 4

“There shall be no pyramiding of overtime pay. Officers shall not be paid more than once, or for more than one (1) reason, or under more than one (1) provision of the Article for the same hours worked.” This practice is a significant disruption and may have been occurring for an extensive period in the past.

Management should also examine the specialized services to determine if they are necessary and attempt to reduce the amount of paid leave in the CBA during the next round of contract negotiations.

RECOMMENDATION 25 – ENFORCE THE POLICY ON REPORT WRITING

The department is transitioning to the RMS platform *Pathfinder*, a cloud-based system, in 2024. The Chief implemented procedures governing what calls for service must be entered into the RMS system. This is a key factor in determining appropriate staffing levels. Prior leadership failed to hold membership accountable about report submission resulting in inconsistent reporting practices. The policy change should result in greater accountability across the board and will provide the chief with the data necessary to make sound decisions for staffing and scheduling.

RECOMMENDATION 26 – DISCONTINUE THE USE OF COMPENSATORY TIME.

Compensatory time in a police department causes excessive overtime and disruption in scheduling. The use of “comp” time should be halted immediately. Typically, the

accumulation and subsequent use of “comp” time in policing is problematic because record keeping is often left to the employee. Often disputes arise over available time, when it can be used, and the ultimate payout at separation of employment. Instead of “comp” time personnel should be paid for hours worked at the time they work.

RECOMMENDATION 27 – CONTINUE TO RENOVATE THE FACILITY.

Overall, the department is utilizing its existing office space to capacity. But the City should continue to renovate the office area. During the preliminary site visit, crews were installing an access control system. This is an important first step in providing improved site security. As part of the renovation of the facility, the City should consider the installation of shatter resistant window film to entry doors and within the main lobby in the police department. Shatter resistant window film is a cost-effective means of fortification that is a fraction of the cost of conventional ballistic glass. Renovations to the interview room should be completed as soon as possible to allow full use of the installed recording systems utilized during interviews.

RECOMMENDATION 28 – IMPROVE EVIDENCE STORAGE AND PROCEDURES.

The evidence room is also being renovated. An adjoining office is being converted to afford the department additional evidence storage space. As part of the renovations, the interior walls of this room that “share” a wall with adjoining offices should be covered with ¾ inch plywood. This prevents inappropriate access to the room. Additional reinforcement should be added to the ceiling in those areas that utilize drop ceiling systems. [NOTE: *The chief was*

provided a customizable evidence policy, and additional examples can be obtained through the IACP.]

RECOMMENDATION 29 – UPDATE THE POLICIES AND PROCEDURES MANUAL.

The department should engage a company such as Lexipol to assist them in updating the policies and procedures. Utilization of a service will reduce liabilities that are often the result of policies and procedures developed internally without professional review. Similar services are offered by the PA Chiefs of Police Association as well as the International Association of Chiefs of Police (IACP).

As part of the updated manual, the department management should engage in discussions with the Union for the development and implementation of a random drug testing policy. *[NOTE: The chief was provided with a customizable random drug testing policy.]*

The department continues to rely on policy and procedures distributed through paper copy. The chief should explore the use of Power DMS, a web-based management system, to track the agency's compliance with internal policy and procedures. This software platform tracks an officer's receipt and review of any policy or procedure that is enacted, revised, or updated. Furthermore, the platform allows the Chief to develop officer testing associated with the policy or procedure all of which is tracked electronically and can be invaluable during civil litigation.

FIRE DEPARTMENT

RECOMMENDATION 30 – ENTER ALL FIRE DEPARTMENT ACTIVITY IN THE FIREHOUSE REPORTING SOFTWARE

Fire companies battle with inconsistent record keeping and report completion. The challenge with incomplete and insufficient reporting is that this data ends up not supporting the operational needs of the Department. Incomplete data makes grant applications that require state and federal reporting numbers to be included difficult to access.

All information such as response times, training and certifications, and firefighter demographics should be maintained consistently and correctly in *Firehouse*. The chief should mandate that all firefighters be trained and use the software to record information.

RECOMMENDATION 31 – REQUIRE LEVEL 1 CERTIFICATION FOR ALL NEW RECRUITS

The department has a goal for all new firefighters to reach *Firefighter Level I* within three years. This goal is important for the safety, efficiency, and effectiveness of the department. This nationally recognized certification sets a standard for NFPA. As demonstrated in the financial section of this report, there are relief funds available for training and it is an allowable use of the funds. This also will improve eligibility for federal FIRE Act and SAFER grants. Firefighters should have their training and certifications recorded in the department's *Firehouse* reporting software with regularity.

RECOMMENDATION 32 – REQUIRE ALL ACTIVE FIREFIGHTERS TO PASS AN ANNUAL PHYSICAL

Firefighting is a physically demanding and difficult activity. Whether career or volunteer, the risks and physical performance requirements are the same. Year after year, about half of all firefighter fatalities are cardiovascular related, and firefighter fitness for duty is one of the biggest issues in the fire service today. This is another program that can be funded by relief funds. The City provides workers' compensation insurance for all firefighters and, therefore, has an interest in the health and welfare of all employees and volunteer firefighters.

RECOMMENDATION 33 – REVIEW THE USE OF FIVE (5) FIRE STATIONS – REDUCE TO THREE (3)

The City should engage with the LVFD officers to discuss the use and benefit of closing at least two (3) of the fire stations. Even with three stations, the ratio of both residents and area covered will remain greater than most other communities with paid and combination departments. The review should take into consideration manpower, responses, and run times. ISO requires one engine apparatus/company for each 1.5 square miles, and one aerial/apparatus company for each 2.5 square miles, based on population density. Reducing to three stations would remain above those levels.

There is an operational cost component to maintaining five fire stations in a 2.3-square-mile first response district. While it is recognized that there are concerns with the location of fire stations and the traditions of the five fire stations and companies, the opportunity for immediate cost reduction, medium-term cost avoidance, and long-term

capital requirements for maintaining five stations will reduce the overall cost of providing adequate fire protection to the City.

PA DCED provides a free service to municipalities to assist with the merger discussions of fire companies. By submitting a Letter of Intent to DCED, the City can request professional technical assistance for facilitating these discussions.

RECOMMENDATION 34 – CONTINUE THE USE OF DUTY DRIVERS AS PART OF THE FIRE SERVICE

With the difficulty of recruiting volunteer firefighters and the lack of availability of people during daylight hours, it is necessary to continue to employ duty drivers who can respond quickly and move fire apparatus to the fire scene. The City should research whether the duty drivers should be classified as firefighters based on the Fair Labor Standards Act and ensure that both full-time and part-time employees are paid for hours worked. The continued use of paid drivers and volunteer firefighters is the most efficient and financially beneficial method for providing fire protection.

RECOMMENDATION 35 – DEVELOP JOB DESCRIPTIONS FOR PAID PERSONNEL.

This should include a description of the position, qualifications, certifications required, description of the tasks and responsibilities, and a process for measuring performance and accountability. This should be completed for the duty drivers and the fire chief.

RECOMMENDATION 36 –DEVELOP A TRANSITION PLAN TO MOVE TO THE COUNTY 911 CENTER

This should include a summary of all current and projected costs for providing the current ring-down service, as this will be a savings in providing fire service to the City. It will also allow the full-time employees to engage in code enforcement activities that will improve fire safety and generate revenue to support the fire services.

RECOMMENDATION 37 – REQUIRE DETAILED ANNUAL BUDGETS FROM THE LVFD

Fire departments receiving financial support from their municipality are required by state statute to submit budgets to their municipality. As volunteer fire departments require more support, both financial and non-financial, from their municipalities it is incumbent on them to provide open and transparent views of their financial operations. The AG relief association audit for the period ending December 31, 2021, showed a balance in the Latrobe Firemen’s Relief Association of \$1,148,331 in investments and \$120,103 in cash. This balance is far greater than the City and fire department combined spend in any given year.

The report also showed an average spending of about \$132,000 per year mostly on insurance premiums for firefighters. No funds were expended on training and only \$38,619 was spent on equipment during this period. The City should discuss the distribution of expenditures with the LVFD officers to determine whether other expenditures (such as SCBA breathing apparatus and other protective gear) can be supported by the relief funds. **Appendix D** provides the eligible uses for fire relief funds.

RECOMMENDATION 38 –ADOPT A FALSE ALARM ORDINANCE

Many communities use a false alarm ordinance to enforce alarm system maintenance that reduces the workload on fire department resources and creates an additional revenue stream for the municipality. In any given year, about 50% of calls are related to false alarms – many of which are not even in the City but are in Derry and Unity townships.

RECOMMENDATION 39 –REVIEW MUTUAL AID RESPONSES

While sufficient resources need to be dispatched to provide adequate apparatus and manpower to meet the requirements of NFPA 1720 and 1500, the number of mutual aid responses should be analyzed to understand what aid is being provided and received. Furthermore, formal mutual aid agreements that are in place should be reviewed, updated, and amended to be more favorable for the City’s fire department.

RECOMMENDATION 40 – REDUCE FIVE ENGINES TO FOUR

Along with the review of the fire stations and given the statistics for emergency responses, the average number of firefighters responding, and the number of apparatuses owned by the department, it is recommended that the five engines be evaluated based on performance, pump tests, age, and capabilities. A reduction of five (5) engines to four (4) (three primary and one reserve engine) would reduce the costs of purchase and the costs of vehicle maintenance over time.

PUBLIC WORKS DEPARTMENT

RECOMMENDATION 41 - EVALUATE THE OPERATIONS STRUCTURE - CONSIDER ANOTHER LEVEL OF MANAGEMENT

The public works department is divided into two distinct and separate operations. The director is charged with supervising both operations. Each operation requires a high degree of focus and attention to detail and the physical presence of the director to work through issues and resolve problems. There is also a significant amount of planning and management level work that the director needs to accomplish that cannot be done because of the lack of management level staff to oversee the very important activities of the public works operation while managing the transfer station. Although the code enforcement officer fills in as an assistant public works director, this is not an ideal practice since it limits the hours available for proactive code enforcement.

One approach considered would be to create two new positions in the CBA that would be “crew leader” positions. These positions would be paid slightly more (perhaps \$1.00 more per hour) to perform some of the routine management level work like ordering, planning projects, and providing field oversight of projects and personnel. The two “crew leaders” could be cross-trained so that the oversight of the routine public works activities and the transfer station operation would always have supervisory coverage.

Another approach would be to hire a director to oversee the transfer station and staff only. The transfer station is a

business operation that requires a lot of attention. It is confined to one location and has its own equipment and functions that are relatively routine. A focused management level director would provide the necessary oversight for this important operation of public works that generates significant revenue for the City. A director that is focused on the transfer station could implement improvements to maximize the operation and plan for long-term upgrades and new technology.

RECOMMENDATION 42 – REPLACE THE TARP STORAGE SHED WITH A PERMANENT ROOF STRUCTURE THAT ALLOWS FOR THE INTEGRATION OF THE LIQUID STORAGE

The City utilizes 100% rock salt and calcium chloride as part of its winter maintenance snow removal. The City should invest in a permanent structure with upgraded lighting to protect its rock salt investment at the facility. The current tarp construction is prone to wind damage and tearing that will constantly need repaired and replaced. The calcium chloride liquid storage and overhead boom system could be integrated into the construction of an upgraded structure.

RECOMMENDATION 43 – PERFORM A BUILDING SPACE ANALYSIS

The main public works garage space is at maximum capacity and needs to be thoroughly evaluated. The City has a large investment in vehicles and equipment that are located within a garage that requires complicated maneuvers to angle equipment. This is both unsafe and will eventually result in damaged equipment. There is additional yard space that provides the potential for adding equipment and office space - this would require planned renovation and additions. A space utilization analysis by an architect to

determine the structural integrity of the building and provide options for renovations would assist the City with decisions about future upgrades to the building.

RECOMMENDATION 44 – REPLACE THE EXISTING SCALE AT THE TRANSFER STATION

The current scale used at the transfer station requires a lot of manual actions and communication from the weighmaster inside the facility. Newer, modern scales have digital outdoor displays that can provide remote access that reduces staff hours. The current scale has reached its useful life and needs significant repairs and parts. The current scale is limited to 40' and should be upgraded to accept 80.' The tonnage is also limited – a new scale would increase tonnage limits. Fees can be adjusted to cover costs.

RECOMMENDATION 45 – CONSIDER MODERN PAYMENT OPTIONS AT THE TRANSFER STATION

The ability to scan checks, use Venmo or PayPal, use QR codes, and take credit card payments on-site would modernize the operation and make it more profitable. The City's bank does not currently have the capability for any of these options.

RECOMMENDATION 46 – DEVELOP A DETAILED TRAINING PROGRAM FOR EMPLOYEES

The City is supportive of training when it is cost effective and able to be attended locally. Training provided to employees can affect their productivity and efficiency. Benefits of training include improvements in morale, motivation, productivity, and quality of services.

Training and Professional Development for the Public Works Foreman

The Director's role as not only a supervisor, but also worker in the department, requires both supervisory and technical training. The LTAP Roads Scholar Program is an excellent resource for the City to consider. The PA State Association of Township Supervisors (PSATS) and the PA State Association of Boroughs (PSAB) both offer excellent training annually around the Pittsburgh region.

- Pennsylvania LTAP Roads Scholar Program I & II
<https://gis.penndot.gov/ltap/>
- Routinely evaluate courses offered by Pennsylvania State Assoc of Twp Supervisors (PSATS) and Pennsylvania State Boroughs Association (PSAB)
<http://www.psats.org>
<http://www.psab.org>

Training Program for the Department

- Basic electrical course
- Attend Annual PA One Call Event (September) and consider hosting a training on site just for City personnel (offered for free)
<https://www.pa1call.org/pocs/117b8650-3f40-4caf-bc82-fa4b4067e976/Events>

RECOMMENDATION 47 - DEVELOP ANNUAL SAFETY TRAINING PROGRAM

The workers' compensation insurance carrier should be able to provide a resource for toolbox talks or follow up at no expense. Examples of topics include:

- Compressed air
- Bench and hand grinder safety
- Hand tool safety
- Slips, trips, and falls
- Lock-out, Tag-out
- Chainsaw safety
- Pre-job safety

RECOMMENDATION 48 – DEVELOP A LONG-RANGE PAVEMENT MANAGEMENT PLAN

The City should develop a long-range plan for paving and reconstruction of its 41.20 miles of paved roads and alleys. A pavement management plan will ensure that community goals and needs are met, inform the public of the prioritization of upcoming projects, encourage efficient administration, and allow the City to be proactive and coordinate utilities work with road repair. Cities use pavement management software to record conditions, estimate costs, and schedule routine maintenance.

There are innovative, inexpensive services that have been developed recently to assist municipalities in their evaluation of their road infrastructure. One service is called *StreetScan*. This company uses a vehicle outfitted with high resolution imaging and gyroscopes that analyze road surfaces every 10' and provide the image with a 1-10 rating based on the PASER rating system developed at the University of Wisconsin. The final report is an excellent overall snapshot of the road system of the municipality. The cost is \$100-\$120 per mile. More information can be found at <https://streetscan.com/>

RECOMMENDATION 49 – CONTINUE USING SHARED FUNDING FOR STREET MAINTENANCE

The City does not have a dedicated funding source for its street resurfacing needs. The City could consider dedicated millage for street improvement purposes in addition to revenue from other sources that can be directed for street maintenance like those of the stormwater fund. A community with 41.20 miles should be addressing 4.5 miles of roadway per year on a 10-12 year paving program.

RECOMMENDATION 50 - CONSIDER SEALCOATING STREETS

Unprotected asphalt surfaces are sufficiently porous to allow water to seep into the base courses. The water softens the aggregate and reduces the overall load carrying capacity of the pavement. More severe damage is caused by the expansion of the trapped water in the pavement during winter months. The freeze-thaw cycles create large cracks and the problem is steadily worsened.

The City should consider sealcoating streets that have been constructed in the last 5 to 10 years if the roads are in fairly good condition. The sealcoat will create an impervious barrier that will prevent water from seeping into the pavement. The sealcoat will also protect the roadway from ultraviolet rays and deicing materials. There are a variety of sealcoats in the industry that are conducive to urban settings such as slurry seals and microsurfaces.

RECOMMENDATION 51 – CONTINUE THE DETAILED EVALUATION OF SOLID WASTE AND RECYCLING

The City is ahead of an expiring contract with its current hauler. Regional refuse rates have skyrocketed, and larger

contracts have begun to limit the pool of interested bidders to only those large enough to already have the vehicles and manpower to take on larger or less geographically desirable contracts. The City should continue its comprehensive evaluation of its contract costs and performance including a market analysis. This study will result in a refined bid document that will be structured to bring more bidders to the table while aiming to keep rates reasonable for users.

RECOMMENDATION 52 – DEVELOP AN OPTIONAL PLAN FOR IN-HOUSE SOLID WASTE AND RECYCLING COLLECTION

The City was proactive in evaluating the market with a pre-bid of the solid waste and recycling contract. It revealed that the market is getting tighter and more costly. The City has an advantage over most communities in that it maintains its own transfer station that provides a short-term drop off solution for haulers who can then transport to the landfill. Manpower and refuse vehicles would be the primary concern for an in-house program because refuse vehicles have a long lead time of nearly 24 months and solid waste workers are in short supply and high demand. If the City is going to consider moving this collection in-house, a more formal business plan should be developed as soon as possible to determine if this option is economically and practically feasible.

RECOMMENDATION 53 – CONSIDER SEASONAL AND PART TIME EMPLOYEES

Most municipalities utilize seasonal labor for lower-level maintenance activities. During the peak construction season, there is an abundance of landscaping and street maintenance activities (like crack sealing, right of way

clearing, grass cutting, and line painting) that could be accomplished with seasonal labor. Vacations, personal, and sick time impact the productivity of the City's small crew during the summer months. The department should maximize the use of summer employees and assist the department for labor intensive storm drainage projects and routine pavement maintenance.

RECOMMENDATION 54 – CONSIDER INCREASING THE PARKING RATES AND ENFORCEMENT

Parking meters are installed to manage valuable parking spaces in commercial districts during peak parking hours. The enforcement of parking meters encourages compliance and reduces commercial complaints that parking is not available. The current rates of the parking meters encourage illegal parking because enforcement is not uniform and consistent. Prime parking hours may not follow the typical daylight shift hours and should be reviewed and adjusted to when parking restrictions are necessary. This may be during evening dinner rush hours or weekend evenings. Increasing rates and adjusting enforcement will increase parking revenues for this program.

RECOMMENDATION 55 – EVALUATE PRIVATIZING PARKING OPERATIONS

The City has valuable parking assets in its garage and lots as well as over 900 metered spaces. Those assets are underutilized and the enforcement underperforming. The parking assets would be attractive to a private parking management company to manage and enforce parking regulations. Privatization of parking assets is becoming more popular as collection and enforcement has become easier with newer technology. The City should consider

putting together an RFP for a private service to manage its parking assets.

RECOMMENDATION 56 – ENTER INTO AN AGREEMENT FOR TRAFFIC SIGNAL UPDATES AND MAINTENANCE

The City uses two (2) different vendors for traffic signal support in an “on-call” fashion. It is difficult for issues to be identified with the signal system network if the vendor is not brought on-site at least annually to perform preventative maintenance inspections and upgrade components. It would be advisable for the City to have a multiyear maintenance agreement with *Traffic Systems Services* that includes a regular inspection and upgrade plan.

RECOMMENDATION 57 – FINALIZE THE LED BULB REPLACEMENT PLAN AND FUND IT ANNUALLY

The director was in the process of developing an LED bulb replacement plan that will require a five (5) year phased budget allocation. This is an excellent initiative that should be implemented within the timeframe being proposed. This project can be completed in-house, which will keep the costs low. The benefit and return on this investment will be in the reduced electrical costs and improved lighting at the signalized intersections.

RECOMMENDATION 58 – UPGRADE REMAINING TRAFFIC INTERSECTIONS WITH RADAR DETECTION, BATTERY BACKUPS, AND GENERATOR CONNECTIONS

There were six intersections upgraded recently within the last three (3) years. The remaining five (5) intersections should have the same upgrades with radar detection, battery backups, and generator connections that will be able

to operate the intersections during periods of power interruption.

RECOMMENDATION 59 – INSTALL ADDITIONAL OBSERVATION CAMERAS

There are several intersections in the business district that have observation cameras – additional cameras should be installed as funds become available. Currently the public works director does not have access to the cameras. Operations management requires the ability to utilize all tools available to make the best decisions and assist with the deployment of employees and vehicles. The director and his operations management staff should be provided with their own username and password to regularly access the cameras.

RECOMMENDATION 60 – IMPROVE THE PA “ONE CALL” TICKET MANAGEMENT PROCESS

The oversight of the PA “One Call” ticket system is now under the PA Public Utility Commission. Ticket violations by municipalities are more closely scrutinized and there is a need for public works management and staff to take the ticket management process more seriously. Increased training in-house for staff that are excavating and for those locating lines is extremely important to maintain compliance. Individuals that are closing tickets should have their own usernames and passwords for trackability of the ticket process.

PARKS AND RECREATION

RECOMMENDATION 61 – CONTINUE TO EVALUATE THE COMMISSION WITH STRATEGIC PLANNING EFFORTS

Latrobe has a great model that provides the necessary recreational programs and maintenance components for its residents' recreational needs. The Commission is functioning well and should continue to be used as the vehicle for the City's parks and recreation needs. The participating communities and school district should regularly engage in a strategic management process to determine long-term costs, performance, and future investments.

RECOMMENDATION 62 - THE CITY AND COMMISSION SHOULD CONSIDER SHARED SERVICES.

The City and Commission are currently not working together to share labor creatively. There are a lot of opportunities for both entities to share equipment and personnel resources due to the type of work performed that would reduce the operating expenses and capital expenses by both entities. Those areas that could be explored more thoroughly are:

- Joint road repair contracts (parking lot and trail work could be included)
- Shared equipment used for trucks and equipment.
- Joint winter maintenance planning / sharing both personnel and equipment.
- Shared utility management of electric and gas bills

CODE ENFORCEMENT

RECOMMENDATION 63 – ADD AN ADDITIONAL CODE ENFORCEMENT OFFICER

Code enforcement work needs to be focused, planned, data-driven and proactive. The current structure provides only reactive enforcement because of the office workload. There should be at least one additional code officer working full time to proactively canvas neighborhoods and the commercial districts for property maintenance violations.

RECOMMENDATION 64 – IMPROVE THE QUALITY-OF-LIFE TICKETING PROGRAM

The City's *SmartGov* software has the capability of logging violations and issuing tickets from the field. The current practice of documenting and then issuing the tickets back in the office is a duplication of labor. Using remote software and a portable printer in the vehicles will reduce time and increase productivity. *[NOTE: The Smartgov software is expected to go live in October of 2024. The City is currently in the testing phase of the implementation.]*

RECOMMENDATION 65 – ASSIGN A MARKED VEHICLE FOR CODE ENFORCEMENT

The role of code enforcement requires the officer to spend time in the field which requires a reliable vehicle. It is not uncommon for retired police vehicles or a pickup truck to be used for code enforcement activities. A designated vehicle that is outfitted with the code enforcement laptop, gear, tablets, and printers should be assigned for productive enforcement activity. Currently the code office shares a City vehicle with administrative and other departments. This is inadequate since the vehicle should be clearly marked for code enforcement so that the public is assured of the legitimacy of the contact with officers.

RECOMMENDATION 66 - UPDATE THE CODIFICATION OF ORDINANCES

The City has already taken the labor intensive step of digitally codifying its ordinances through General Code Publishers and made the investment in Ecode360 so that there is public access through the website link. Ordinances have been updated through September 2022 but should be kept current to ensure accuracy.

RECOMMENDATION 67 – IMPROVE THE PERMITTING PROCESS WITH ONLINE FILLABLE FORMS

The City has application forms available online that could very easily be converted to fillable forms and submitted to the City or contracted services online. For example, the building permit process has a link to TKL, who then provides a link to a PDF that needs to be printed, filled out, and returned to the City for processing and payment. Consider making all permit applications available online as fillable forms that can be submitted and paid for online, making the applicant experience much more pleasant and “user friendly.” This process limits the staff time needed to walk applicants through the application process. The *Smartgov* software should make a fully automated process possible.

RECOMMENDATION 68 – ESTABLISH A UCC APPEALS BOARD OR PARTICIPATE IN A JOINT BOARD

The City opted into the PA UCC and is required by law to have a UCC appeals board in place. Many communities find these Boards difficult to maintain as they meet so infrequently and require specific accreditations and certifications for Board members. For this reason, COGs have formed joint UCC appeals boards to handle appeals from multiple jurisdictions. The City should either re-establish the local appeals board or consider participating in a joint board. Without an appeals board in place, any appeal may be “deemed approved” by the courts for lack of due

process for the applicant. Efforts are currently underway for the formation of a regional UCC appeals board through a COG.

RECOMMENDATION 69 – IMPROVE THE RENTAL REGISTRATION PROGRAM

The City only requires landlords to register their properties or tenants at change of occupancy. The “best practice” for rental management is to adopt an annual rental registration process. An annual registration of tenants provides information for tax collection, public safety, and code enforcement purposes. There should be a per unit fee to cover the administrative costs to mail applications, and to enter and maintain the tenant information in the *Smartgov* software.

RECOMMENDATION 70 – CONSIDER ADOPTING A RENTAL INSPECTION PROGRAM

The City does not currently have a regular rental inspection program. Rental inspection programs improve the rental housing stock in the neighborhoods by requiring that the rental units meet basic standards for quality living and home safety. Inspections provide the City with updated information on living conditions and utility services. Inspection programs are typically performed once every two or three years, or at the time of tenant change if sooner. An inspection fee usually averages \$85-\$100 per inspection, with additional fees for re-inspections and no-show inspections. Because of the large number of rentals located within the City (about 1,260), a rigorous and regular inspection program should be adopted.

RECOMMENDATION 71 – UPDATE THE FIRE LOSS ESCROW ORDINANCE

When a fire occurs in a municipality and the property is a total loss, demolition and structural removal can be required through a fire escrow ordinance. It is not uncommon for property owners to walk away from a total loss with the insurance funds and build elsewhere leaving the burned-out structure to become an eyesore and safety concern for the host municipality. Latrobe has adopted an ordinance requiring insurance companies to provide a check to the municipality to escrow funds to cover the cost of demolition or rehabilitation. The City should update its contact information with DCED, making it easier for insurance companies to contact the City in the event of a loss <https://Citys.org/ordfiles/Fire%20Losses.pdf>

RECOMMENDATION 72 – ADOPT THE 2023 INTERNATIONAL PROPERTY MAINTENANCE CODE (IPMC)

The City adopted the 2012 IPMC but has not updated the newest 2023 version. The updated versions are deployed so that municipalities can keep up with the latest trends in materials, processes, and enforcement tools. The City should adopt the most recent version of the IPMC to ensure that the codes are current.

COMMUNITY DEVELOPMENT

RECOMMENDATION 73 – CONSIDER THE USE OF THE DCED NEIGHBORHOOD PARTNERSHIP PROGRAM (NPP) AND NEIGHBORHOOD ASSISTANCE PROGRAM (NAP) TAX CREDITS.

This is a valuable funding program for CDCs and non-profit organizations that work in neighborhood revitalization. DCED just doubled the money available for this program to \$72 million and opened a new round of funding. CDCs may apply for either a six-year program (NPP) or a one-year program (NAP) that awards tax credits to corporate sponsors who are willing to invest in the business district and neighborhoods. Eligible activities include affordable housing, blight elimination, community economic development, integrated housing and health initiatives, weatherization and housing rehabilitation, mortgage foreclosure prevention, workforce development, and job training

RECOMMENDATION 74 – CONSIDER A PUBLIC ART OVERLAY DISTRICT AND REVIEW BOARD

The City should consider adding a Public Art Overlay to its Zoning Ordinance to encourage and regulate public art. The benefit of incorporating public art into the reuse of blighted properties is that the art fosters a sense of belonging to place. Public art can also create a sense of place that helps people make meaning from their surroundings, and the act of generating artwork can build relationships in a community. Integrating public art into Latrobe's redevelopment projects generates community engagement and enhances the results of blight remediation.

When people think of public art, they often think of large, permanent sculptures, such as the stone and bronze statues that are often found in city and town centers and parks, or perhaps a modernist sculpture in an office building plaza. But public art is extremely diverse. Public art can be temporary or permanent and can include installations, performances, festivals, music, dance, theatre, paintings, text, chalk, graffiti, yarn bombs, functional art (like street furniture or signage) found materials in the natural environment, digitally mediated experiences, and dazzling displays of technology, color, and light.

RECOMMENDATION 75 –ELIMINATE ONEROUS PARKING MINIMUMS

According to *Strong Towns*, a national planning organization, “local laws requiring private property owners to provide and maintain a certain number of off-street parking spaces do not belong in a strong city or town. Parking minimums take large chunks of land out of productive use. Developers who are required to build parking stalls pass the cost on to the tenant. Parking minimums are especially onerous for subsidized affordable housing, where part of the goal is to keep costs, and therefore rents, as low as possible. These projects invariably have very slim margins between viability and non-viability, and a parking minimum can easily make the project non-viable.

Parking lots can dramatically impede the walkability of an area. The "spreading out" effect of devoting much of our

land to parking lots means that walking, bicycling, and even public transit become less viable modes of transportation. Parking, especially mandated free parking, is a powerful inducer of more automobile use and less healthy lifestyles.

Parking is also costly for small businesses because a chunk of the overhead goes to building and maintaining the required parking spaces. Parking minimums often make the traditional development pattern impossible. Even where the zoning code allows a mix of uses (like an apartment above a store), allows buildings to come right up to the sidewalk, and allows a fine-grained mix of smaller structures, parking minimums make an old-fashioned Main Street all but impossible.²

RECOMMENDATION 76 – ENGAGE IN ALTERNATIVE ENERGY STRATEGIC PLANNING

Developing alternative energy strategies can increase a community’s resilience and reduce the costs of operation long-term. The City should consider developing a Community Energy Strategic Plan (CESP).

The steps to complete this plan are:

- Step 1: Establish and Charge a Leadership Team
- Step 2: Identify and Engage Stakeholders
- Step 3: Develop an Energy Vision
- Step 4: Assess the Current Energy Profile
- Step 5: Develop Energy Goals and Strategies
- Step 6: Identify and Prioritize Actions

² Strong Towns, [The Many Costs of Too Much Parking \(strongtowns.org\)](https://strongtowns.org), 2018

- Step 7: Put Together a Financing Strategy
- Step 8: Develop a Blueprint for Implementation
- Step 9: Plan to Regularly Evaluate
- Step 10: Develop, Adopt, and Publicize the CESP

RECOMMENDATION 77 – CONTINUE TO WORK WITH THE WESTMORELAND COUNTY LAND BANK

The Westmoreland County Land Bank works closely with the Westmoreland County Redevelopment Authority to address and eliminate blight in the member communities. The work is carried out through blight demolition, residential and commercial rehabilitation, acquisition, and repurposing of vacant and tax-delinquent properties, accessible and affordable housing, training and education partnerships, historic preservation, and brownfield redevelopment. Latrobe has been a member of the land bank since 2014, and the land bank has demolished and sold 10 residential properties in Latrobe during the past decade. Two (2) properties are available for sale currently.

RECOMMENDATION 78 – USE CONSERVATORSHIP TO OBTAIN SITE CONTROL OF BLIGHTED PROPERTIES

The Abandoned and Blighted Property Conservatorship Act, also known as Act 135, was put in place to ensure that residents and property owners in a community can report substandard or abandoned buildings to prevent potential risks or hazards. Through Act 135, a party in interest can petition the Court to appoint a conservator to take control of a blighted, substandard, or abandoned property, and carry out necessary repairs. The conservator ensures that the property returns to a relatively safe and functional state and that it is put to productive use. The appointed conservator will then become the property’s virtual owner and will have

the power and responsibility to renovate and sell the property. Once the property is sold, the cost of conservatorship and the property renovation can be deducted.

RECOMMENDATION 79 – APPLY FOR GRANT FUNDS THROUGH THE “MAIN STREET MATTERS” PROGRAM

The Main Street Matters (MSM) program is designed to support Pennsylvania downtown cores and surrounding neighborhoods with tools to create healthy, vibrant, and welcoming communities. DCED announced a new round of funding in the amount of \$20 million to support revitalization efforts in planning, business support, aesthetic improvements, and the increase of safety and security.

Because Latrobe has been designated as an official “Main Street” community, the City should receive priority funding. Designation is an opportunity for targeted investment and development including the identification of specific needs for investment and/or development and the design and implementation of a strategy to address those needs.

TECHNOLOGY

RECOMMENDATION 80 – EVALUATE ACCUFUND AND CONSIDER A MORE ROBUST ENTERPRISE SOFTWARE

The City is currently using *Accufund* for its general ledger and accounting system. While *Accufund* is suitable software for supporting the City’s financial management system, it is limited to ONLY the finance operation. The City would be better served to evaluate a government enterprise software package that would address the needs of all City departments and would integrate the financial management

system with public works service requests, land use and asset management, permits, and utility billing for the transfer station and stormwater.

RECOMMENDATION 81 – EVALUATE A FASTER INTERNET SERVICE PROVIDER

The City is currently using Comcast business service which is not able to provide the necessary speed and bandwidth the City offices require. There is another local provider that could provide fiber optic with much higher speeds for City business.

RECOMMENDATION 82– ADD THE POLICE MOBILE DATA TERMINALS AND LAPTOPS TO THE NETWORK

The police department’s MDTs in the vehicles are not connected to the network so they are not managed the same way that the other devices are managed. The MDTs should be added to the maintenance schedule and managed in the same manner, which may increase the number of devices that need updated and replaced on the inventory and schedule provided in **Table 22**.

RECOMMENDATION 83 – ASSIGN MAINTENANCE OVERSIGHT OF THE WEBSITE

The City’s website has undergone a recent update and provides valuable information to the public. The website is ADA compliant and has a user-friendly and attractive appearance. The site, however, needs regular content updates and active page links. Assigning department directors to manage and oversee their own pages is a common practice that requires accountability from the departments for information that is current and pages that

remain active. Departments should be charged with this responsibility.

RECOMMENDATION 84- INSTALL CAMERAS AT THE CITY BUILDING, PUBLIC WORKS, AND FOR ALL INTERSECTIONS

Internet or closed circuit camera systems provide an added layer of security for public places. Cameras installed inside facilities provide for another added level of security in the event of a perimeter or building breach. The City should have cameras installed at all of its buildings including the City Building, public works garage, park facilities and grounds, and at all intersections. There are systems that will operate on the same platform for viewing and that can store video on a schedule and override the data after a prescribed interval to limit the storage needs. Cameras at intersections that would be accessible to management staff would allow for remote monitoring of road conditions during inclement weather as well as provide observation of the status of the signal operation.

RECOMMENDATION 85 – REPLACE HARDWARE THAT IS OUT OF WARRANTY - PLAN FOR WINDOWS 11 UPGRADES

The City has been updating IT hardware that supports necessary applications for each user and department. Most of the desktop PCs have been upgraded to professional office accounts, however, the administration offices will need their hardware replaced as these machines are slowing down and out of warranty. It is recommended that machines be put on a replacement schedule and new PCs that are purchased have no less than i5 processors with 8GB RAM and 500GB SSD hardware. Hardware upgrades on a regular basis will ensure reliability and functionality for users.

Machines that are running Windows 10 will no longer be supported after October 2025 and they will be vulnerable to system attacks and poor performance.

RECOMMENDATION 86 – INSTALL VOIP PHONES FOR PARKS AND FIRE DEPARTMENT

The City's current phone system needs to be updated across all City operations within the complex. The newest protocol for VOIP voice and data makes voicemails accessible via email and functionality of the handsets interface with cell phones. The area of the building that houses the Parks Commission offices as well as the Fire Department currently requires actual phone numbers to be dialed to reach those locations making it inconvenient, inefficient, and more costly to operate. These areas of the building do not follow the same protocols for voicemail or message forwarding. The City's VOIP system should be extended to those locations.

RECOMMENDATION 87 – INSTALL BATTERY BACKUP DEVICES FOR ALL OFFICES

Battery backup devices help to maintain business activity when the power is interrupted or goes out completely. Desktop PCs and laptops that are not protected with battery backups will have a shorter life cycle and may experience data loss and complete failure prematurely because of a power surge. The City should consider battery backup devices for each office workstation.

RECOMMENDATION 88 – UPDATE THE AUDIO-VISUAL EQUIPMENT IN THE COUNCIL CHAMBERS ROOM

The City would benefit from having a Council meeting room with updated audio and visual technology for presentations.

Additionally, all departments benefit from having a training room where employees can train on-site and not have to travel. This room should be upgraded, and its use expanded so that all departments can use it as a City-wide training facility. A training room with adequate audio and visual components allows the City departments to host trainers and save money by being able to use their own equipment. It also allows for more intergovernmental hosting opportunities.

RECOMMENDATION 89 – UPGRADE BUILDING ACCESS CONTROLS

The City facilities are not currently secured using electronic access. Managing facilities with electronic access control will ensure that facilities are able to be audited for access and secured from public interference. Remote access can be managed electronically and with schedules from a PC rather than hard-key locked.

RECOMMENDATION 90 – REDUCE THE NUMBER OF MODEMS IN CITY HALL

There are currently multiple modems within City Hall. There are separate modems for police and administration, for the Parks Commission, and for Fire. These three (3) modems could be eliminated, and a single modem used that would improve connectivity and speed while still maintaining separate secure connections for each operation. This should be explored with LV Technology to reduce the redundancy that is causing unnecessary cost and complexity.