



AGENDA
CITY MANAGER SEARCH COMMITTEE
REGULAR MEETING
AUGUST 21, 2023
6:00 PM
CITY COMMISSION CHAMBERS
204 ASH STREET
FERNANDINA BEACH, FL 32034

- 1. CALL TO ORDER**
- 2. PLEDGE OF ALLEGIANCE**
- 3. ROLL CALL**
- 4. APPROVAL OF MINUTES**
 - 4.1 *JUNE 1, 2023*
- 5. NEW BUSINESS**
 - 5.1 **CITY MANAGER CANDIDATE REPORT** - *Colin Baenziger & Associates will present their City Manager candidate report to the City Manager Search Committee, who in turn will review and make recommendations to the City Commission.*
- 6. PUBLIC COMMENT**
- 7. NEXT MEETING DATE**
- 8. ADJOURNMENT**

All members of the public are invited to be present and be heard. Persons with disabilities requiring accommodations in order to participate in this program or activity should contact the City Clerk at (904) 310-3115 or TTY/TDD 711 (for the hearing or speech impaired). All interested parties may appear at said meeting and be heard as to the advisability of any action, which may be considered with respect to such matter. For information regarding this matter, please contact the City Attorney.

CITY COMMISSION AGENDA ITEM
City of Fernandina Beach



SUBJECT:

ITEM TYPE: Approval of Minutes

REQUESTED ACTION:

SYNOPSIS:

FISCAL IMPACT:

CITY ATTORNEY COMMENTS:

CITY MANAGER RECOMMENDATION(S):

Mary Hamburg, Digital Communications Specialist

Caroline Best

Date: June 07, 2023

Submitted By: Caroline Best, City Clerk

COMMISSION ACTION:

The City Manager Search Committee (CMSC) conducted their third meeting Monday, June 1, 2023, at 6:00 PM in City Hall Commission Chambers, 204 Ash Street, Fernandina Beach, Florida. Present were Chair Tim Poynter, Vice Chair Margaret Davis, Recording Secretary Jackie Miller, Members Wayne Peterson and Steve Simmons, and Advisor Jim Hanson. Also in attendance was Human Resources Director Denise Matson.

CALL TO ORDER: Chair Poynter called the meeting to order and led the Pledge of Allegiance to the Flag.

4.0 APPROVAL OF MINUTES: A motion was made by Vice Chair Davis, seconded by Member Miller, to approve the May 15, 2023, Minutes. **Vote upon passage of the motions was taken by ayes and nays, and being all ayes, carried.**

5.1 CITY MANAGER QUALIFICATIONS: Colin Baenziger & Associates Senior Vice President Ron Williams and Senior Vice President for Operations Lynelle Kline participated by teleconference. The draft City Manager recruitment brochure was emailed to the CMSC in advance. CMSC members shared their ideas for changes and improvements for the brochure, paragraph by paragraph, and Ms. Klein made changes in the updated draft to be presented to the City Commission for final approval.

Mr. Williams and Ms. Kline presented an updated timeline for the City Manager hiring process moving forward.

6. PUBLIC COMMENT:

EXECUTIVE SEARCH FIRM SUPPORT: Margaret Kirkland, 1377 Plantation Point Drive, representing Conserve Nassau, recommended that the community vision plan be followed and recommended that mills and ports be mentioned in the brochure. She advocated for coastal experience being a priority when considering City Manager candidates.

7.1 NEXT MEETING DATE: August 14, 2023, to allow time for candidates to be vetted and CMSC members to review candidate applications.

ADJOURNMENT: 7:39 PM

Submitted:

Recording Secretary Jacki Miller

Chair Tim Poynter

CITY COMMISSION AGENDA ITEM
City of Fernandina Beach



SUBJECT:

ITEM TYPE: New Business

REQUESTED ACTION:

SYNOPSIS:

FISCAL IMPACT:

CITY ATTORNEY COMMENTS:

CITY MANAGER RECOMMENDATION(S):

Mary Hamburg, Digital Communications Specialist 8/10/2023

Denise Matson, Human Resources Director

Caroline Best

Date: June 07, 2023

Submitted By: Caroline Best, City Clerk

COMMISSION ACTION:



Fernandina Beach, FL

City Manager Semi-Finalists

Colin Baenziger & Associates

2055 South Atlantic Avenue

Suite 504

Daytona Beach Shores, FL

32118

Cell: (561) 707-3537

Fernandina Beach: City Manager Semi-Finalists

MEMORANDUM

COLIN BAENZIGER & ASSOCIATES

TO: Members of the City Commission and the Citizen's Committee

FROM: Colin Baenziger, Ron Williams and Lynelle Klein **DATE:** August 7, 2023

RE: City Manager Search Update: Recommended Candidates

We are recommending you consider nine candidates (of the approximately 62 who applied) to be your next City Manager. We believe all the candidates are very strong and would do an excellent job as your City Manager. Brief summaries of their credentials follow as well as an outline of our next steps.

The Recommended Candidates

- **Andy Butterfield:** Mr. Butterfield has been the Operations Manager for City of St. Pete Beach, FL (population 8,717) since 2019. Previously he served as the Director of Veteran Affairs at Brown University in Providence, RI for one year. Prior to that, he had a thirty-six-year career in the U.S. Navy, serving most recently as Joint Base Deputy Commander Joint Base McGuire-Dix-Lakehurst, NJ, as well as Commander for Naval Support Activity at Lakehurst for three years. In terms of management style, Mr. Butterfield is a consensus builder who focuses on organizational communication while moving multiple projects forward simultaneously. He revels in being part of a team where everyone is working together to make things better for all. One of Mr. Butterfield's biggest achievements was knitting together disparate units and three previously separate military bases into one strong integrated team. Mr. Butterfield has a bachelor's degree in naval science and political science from the U.S. Naval Academy, a master's degree in national security affairs from the U.S. Naval Post-Graduate School and a master's degree in public administration from Harvard University, John F. Kennedy School of Government.

Note: We do not want to give the impression that we are favoring Mr. Butterfield but feel it is important to explain the value of his experience as a Base Commander (BC). This position is actually very similar to that of a City Manager. He/she generally has a large budget and oversees almost all of the services as a City Manager (fire, infrastructure, public works, utilities, parks and recreation, police, and finance) plus a few others (such as base housing and logistics). Generally, 90%+ of a BC's work force are civilians, and they know the BC will be rotated out in two years. Hence, the successful BC must use a personal approach to motivate and inspire. Simply giving orders will not work. BCs also tend to work closely with local government in the area. While the BC does not work for an elected body, typically, a base has three or four generals/admirals on it, and each one believes the BC should cater to their needs. On top of that, the BC generally actually reports to a different general/admiral who is not on the base. Needless to say, it can be very political. Finally, we have presented several retired military officers (including Howard Wanamaker as Clay County's County Manager and Scott Larese as Titusville's City Manager) who have been

BCs, and all have gone on to become extremely successful city managers / county administrators.

- **Kathleen Gunn:** Ms. Gunn most recently worked for the City of Tamarac, FL (population 70,943) for six years, serving the last two years as City Manager. Previously she was the Assistant City Manager for the City of Miramar, FL (population 140,316) for three years, the Northeast Director of Development for Catholic Extension for two years, and the City of Fort Lauderdale, FL (population 169,270) for seven years, serving six of those years as Assistant City Manager. Throughout her career she has successfully managed teams that have constantly improved the delivery vital programs and services while steering cities to find their niche, leverage their unique character and attract investors. Ms. Gunn has done this through modeling curiosity, commitment, and positive, affirming behavior that starts with her as a leader. One thing she is proud of is successfully leading the City of Tamarac through several crises including managing viral police and commission incidents, hurricanes, a pandemic, and the arrest of her predecessor. Her ability to stay calm in navigating extremely challenging circumstances while continuing to lead a cohesive team to execute plans effectively is exemplary. Ms. Gunn has a bachelor's degree in political science and master's degree in public administration from Pace University and a master's degree of pastoral ministry from St. Thomas University.
- **Tony Hammond:** Mr. Hammond has been the City Manager for Archer, FL (population 1,144) since 2018. Previously he was the Town Manager for Ahoskie, NC (population 4,874) for twelve years and the City Manager for Creedmoor, NC (population 3,128) for two years. Mr. Hammond's style of leadership is best described as situational. As such, he understands the pros and cons of various management styles, when each works best, and how to apply them to different team members. For example, some operate best with minimal input while some need more guidance and oversight. His goal is to employ democratic leadership while articulating company values, coaching, and motivational tools. He is particularly proud of several projects that he helped develop the initial concept and carried through to planning and design and final construction. These included a \$2.5 million state of the art fire station, a \$1.275 million state of the art police station, \$17.5 million wastewater treatment plant and a \$2 million recreational complex, all of which were completed on time and within budget. Mr. Hammond has a bachelor's degree in health care management from Southern Illinois University and a master's degree in public administration from Troy State University. He is an ICMA Credentialed Manager.
- **Dave Molgaard:** Mr. Molgaard most recently was the Chief of Staff and Firm Administrator for Bailey & Glasser, LLP for four years. Previously he was the City Manager for Charleston, WV (population 47,929) for sixteen years, a City Councilmember in Charleston for four years and an attorney for fifteen years. As a manager and organizational leader, he looks to: develop and improve core competencies within the organization; deploy and leverage appropriate technologies; strategically align duties and responsibilities; identify, develop and retain leaders; reform work environments and provide incentives to facilitate the mission; and collaborate with others, both inside and outside of the organization. When Mr. Molgaard first stepped into the role of City Manager in Charleston, he found an organization

with very siloed departments. The result was inefficiency and almost zero inter-departmental collaboration. During his tenure, the culture drastically changed, starting at the department head level. The result was a government that made great strides in cascading managerial initiative and accountability down to the middle managers and frontline supervisors. Mr. Molgaard has a bachelor's degree in English, a master's degree in industrial labor relations, and a juris doctorate degree from West Virginia University.

- **Mark Rooney:** Mr. Rooney recently served as the Village Administrator for Round Lake Beach, IL (population 27,081) for almost two years. Previously, he was the Town Manager for Westerly, RI (population 22,651) for three years, the Village Manager for Carpentersville, IL (population 38,291) for eight years, and the Chief of Staff for North Chicago, IL (population 32,587) for one year. He also worked for Wheeling, IL (population 35,912) for six years, with the last three as Village Manager. Mr. Rooney believes his responsibility is to create and foster an organizational culture and environment in which creativity and trust are valued. Leadership starts at the top so he must serve as a role model for employees to follow. The greatest challenges facing Carpentersville in 2010 were a \$1M structural deficit, failing infrastructure (roads and water/wastewater facilities) and the need to address economic development. He created the slogan, "Get to YES." The idea was to actively seek legal ways to solve residents' and businesses' problems, rather than just saying no. It became the staff's over-arching objective, and the result was the organization's mindset was transformed from bureaucratic lethargy to that of engaged problem solvers. Employee morale skyrocketed as did the satisfaction of citizens and stakeholders (as measured by surveys and feedback from the community). As a consequence, the Village also had a competitive edge in attracting local developers, businesses interested in relocating, and businesses already in the village who needed to expand their operations. Mr. Rooney has a bachelor's degree in education from the University of Nebraska. He has done coursework in the master's degree program at Northern Illinois University but did not attain the degree. He is an ICMA Credentialed Manager.
- **Ty Ross:** Mr. Ross has been the City Manager for Loudon, TN (population 6,733) since 2017. Previously, he served as the City Administrator for Dalton, GA (population 33,644) for seven years. Mr. Ross' management style is humanistic and focuses on employees' needs. His three main tenets are to protect others, protect yourself, and serve. He is proud of his leading role in securing over a dozen acres of formerly dilapidated factories on Loudon's downtown waterfront. The solution he designed and implemented with staff cleared all environmental hurdles and enabled the demolition and clearing of the property which opened clear lake views. What is more, he was able to rebrand a factory's former water tower into a dramatic welcome sign that announces to all visitors they have arrived at a special place. The project remains exceedingly successful and, though somewhat stalled by COVID-19, is well positioned for both residential and mixed-use commercial development in the coming months. Mr. Ross has a bachelor's degree in history from the University of Georgia, a juris doctorate from Georgia State University and a master's degree in business administration from Kennesaw State University. He is an ICMA Credentialed Manager.
- **Bill Schmeling:** Mr. Schmeling was most recently the Executive Director for the Township of Ocean Sewerage Authority, NJ (population 27,814) for fourteen years. Previously he was

a Qualified Purchasing Agent for the Borough of Bradley Beach, NJ (population 4,198) for four years. Mr. Schmeling's managerial style is to provide support to employees with firm and clear direction concerning expectations. He encourages all employees to increase their knowledge of their job through seminars, classes and other training situations. One achievement Mr. Schmeling is proud of was his recommendation to change the way excess flow sent for treatment from their largest service community was calculated. The existing agreement provided for a set annual excess flow calculation based on a fixed gallon per day per building unit. For the Authority's treatment plant, yearly flow is not an issue, but daily flow can be an issue. The yearly approach was made worse by the fact that the service community's population is not consistent year around, but it increased significantly in the summer months. He proposed that excess flow would be calculated on a daily basis, rather than a yearly basis, and charged accordingly. The resulting new agreement implemented a daily ceiling to determine excess flow, which increased revenue for the Authority. Mr. Schmeling has a bachelor's degree in psychology from St. John's University, a master's degree in business administration and a juris doctorate from Vanderbilt University.

- **Lee Smith:** Mr. Smith was most recently the County Manager for Chatham County, GA (population 296,329) where he served in that role for eight years. Previously he was the County Manager for Wayne County, NC (population 124,634) for thirteen years, and the County Manager for Washington County, NC (population 13,589) for eight years. Mr. Smith's management style is to build teams that involve all levels of employees. These teams are assessed regularly and are part of developing solutions for county issues. His most recent achievement was the establishment of a new county police force in six months. Chatham County and City of Savannah had decided to part ways when they could not agree on cost sharing between the parties. The Commissioners gave him a budget and timeline, both of which were met. The results were an approximate \$3M reduction in police service cost while also providing higher service levels such as response times averaging seven minutes or less. Most importantly they established a real "community" police force that talks with the businesses and citizens, participates in community events even on their own time and is seen as allies, not enemies. Mr. Smith has a bachelor's degree in business management from the University of North Carolina. He is an ICMA Credentialed Manager.
- **Bill Sturgeon:** Mr. Sturgeon was most recently with the City of St. Cloud, FL (population 64,489) for nine years, serving the last five years as City Manager and four years prior as Fire Chief. Prior to that he was a Senior Safety Coordinator at Orlando Utilities Commission for two years. Mr. Sturgeon's management style is known as "caring by walking around." He does not sit in his office, but rather he makes sure he has a clear understanding of ongoing issues and that his team members have the resources and support they need to do their jobs. He is a hands-on manager. His leadership style is known as "leadership by intent" and is based on three principles: competence, clarity, and control. One important success Mr. Sturgeon had was professionalizing the staff and bringing leadership stability to the city of St. Cloud. This accomplishment set the city up for many years of success, and they are well equipped to address any future challenges that may occur. He was able to accomplish this transformation by emphasizing training/development, leadership by example, and by engaging his team in problem solving and decision-making processes – thus building a team

of reliable professionals. Mr. Sturgeon has a bachelor's degree in occupational safety and health from Columbia Southern University and a master's degree in public administration from American Public University. He is a Certified Public Manager and an ICMA Credentialed Manager.

Next Steps

The Citizens Advisory Committee will select the finalists on August 21st and forward their recommendation to the Commission. The Finalists will be invited to Fernandina Beach for a tour, public reception, and formal interviews with the City Commission on September 11th and September 12th with a possible decision then or shortly thereafter. In the meantime, if you have any questions, please do not hesitate to contact us.

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Candidate Materials: Reviewing and Interpreting Them

Suggestions for Reviewing Candidate Materials

The materials contained herein are prepared to provide you with information concerning the candidates we are recommending you consider. The materials we and the candidates prepare are designed to provide you with information first and foremost concerning the candidate's ability to do the job. You can then review the materials and determine which candidates you wish to interview.

As you can see, what we have for each candidate is often fairly extensive. When you review the materials, we recommend you begin with:

- The Candidate's Resume. This document provides a brief history of the candidate's employment and possibly some personal information.
- The Candidate's Cover Letter and Introduction. These have been prepared by the candidate and offer insight into what the individual feels is important and his/her ability to communicate.
- The References. These materials provide information concerning what people who know the candidate think about the individual. It is important to note that people are often reluctant to say anything negative about a candidate so even though we push fairly hard to get them to identify weaknesses, the weaknesses and negatives are often limited. Further, if a candidate's references are poor or if we see significant red flags, we generally do not present that individual. We also attempt to reach references who know the candidate but were not provided.

The other materials for each candidate are important as well but probably do not need the same level of attention. They are:

- The Internet / Newspaper Archives Materials. These materials provide information concerning the issues the candidate has dealt with and what he/she has done well and not so well. We do not recommend that you read these materials word for word but rather you scan them and carefully read the sections you feel are the most important. Please also see the following pages for comments concerning the Internet's limitations.
- The Background Checks. For the most part, the Candidates we present tend to have very few if any items of note on their records.

It is important to understand what is provided in the background checks and what it not. First, National Criminal Information Center (NCIC) is the gold standard for reviewing someone's criminal past. Its use, however, is limited to law enforcement agencies for specific purposes. It is not something we have access to. Our nationwide criminal checks are run through a database assembled from data from a wide range of state and local agencies and is not as complete as the NCIC database. Nonetheless, we have confidence in it and have used it successfully for years. Further, we supplement it with checks of the databases of the county and state of residence.

You also need to be aware the criminal databases we use contain convictions and not allegations, complaints, or arrests (unless these lead to a conviction). We also do not check records in family court. The reason is cases are often emotional and parties are not always truthful in attempting to achieve their desired goal. If the allegations are serious and substantiated, they are generally found in the criminal records or covered in the newspaper, at least for people with significant positions in the public sector. Further, a substantial body of law exists concerning what can and cannot be considered in government employment. For example, it is illegal to use a bankruptcy as the basis for not considering a candidate.

Overall, we try to focus on someone's ability to perform the duties of their job. We do not delve into their personal lives which can be murky. It should also be noted that a large body of law exists concerning what can and cannot be considered and it varies from state to state. We try to stay safely on the right side of the line, both for our own sake and that of our clients.

The other thing to consider is we do not want you to be surprised. Even if you cannot legally use a matter in your decision making, if it has been reported, we want you to hear about it from us rather than a third party. That way we can present you with a fair and unbiased analysis of the situation and you can determine what weight is appropriate to give the matter in your decision making.

Interpreting the Internet

When considering material gathered from the Internet, it is important to read carefully and to understand the Internet's limitations.

In part of each candidate's materials is what CB&A's staff gleaned from the Internet and from newspaper archives concerning the semi-finalists. While we would like to think everything published is accurate, we know it is not. For example:

- 1) Some news sources have biases concerning particular individuals or write with incomplete information. Further, reporters have different capabilities and some do not understand the matters they are reporting on. Hence the story may not be accurate.
- 2) Occasionally, governments purposely provide information to the media that is not accurate or the full story, particularly when someone is leaving their employment.
- 3) Some elected officials occasionally make allegations concerning managers or staff members for political reasons whether or not the allegations are based in fact. Further, officials sometimes shoot from the hip without a complete understanding of the real issue and/or all the facts.
- 4) Some residents make allegations that are inaccurate or untrue and which are repeated in the media.
- 5) An employee may be blamed for issues and problems that come to the surface during his/her tenure but existed long before the individual took office. In fact, occasionally an employee uncovers a problem and is dealing with it. That very action can bring problems to light and result in a news story that reflects badly on the person who is actually trying to fix the problem rather than the person who let it fester for years and did nothing.
- 6) Managers/Directors may have more articles than, say, assistants because of the nature of their work. Assistants tend to be much lower profile and hence, less is written about them. Further when assistants make mistakes, the manager/director tends to get blamed.

Further, the Internet changes daily. Articles are added and removed. What is provided here is a snapshot in time concerning what was available on the Internet the day(s) we did the research. If someone were to search the internet tomorrow concerning information on these candidates, additional information or less information might be found. Search engines take up to six weeks

to “find” stories after they are posted on websites. By the same token, a story appearing on a website yesterday may be deleted and may not be there tomorrow.

We should also note we have not included everything we found. Many articles mentioning the candidate’s name have little if any relevance to the candidate’s qualifications. Hence these are often been excluded. Further, if multiple articles exist concerning the same issue, we often select the most relevant and complete articles and do not include the rest.

Where issues of concern were found in the following articles, we have attempted to research them and determine their true nature. Where we found information that we believed was serious in nature and the result of the candidate’s actions or that would could potentially embarrass you, our client, we would have dropped the candidate from consideration and his/her information would not be in this notebook.

One final note is that we generally do not include information from blogs as they are notoriously slanted and unreliable.

Interview Procedures / Questions

Interviewing Candidates

The interview is generally the final step in the selection process. At this point, the executive recruiter has screened the candidates and is satisfied that all finalists are capable of doing an outstanding job. Reference checks and more extensive background checks have been conducted, including discussions with individuals of our choosing and not on the candidate's list of references. Internet searches have been completed, along with a review of newspaper archives. Credit history, educational verification, and criminal background checks have also been run so there should be no surprises once a candidate is selected.

The interview is an opportunity for both the elected officials and the candidate to learn about each other and to determine how well they will work together. It is also an opportunity for the elected officials to evaluate each candidate's management abilities and to decide if he/she would be a good leader for the community. It is important for both the elected officials and the candidate to act professionally and in a manner that will impress the other party, all the while learning what they can about the other.

Since all the candidates are capable of performing the job, the focus of the interview should be on determining who fits best with the elected officials, the staff and the community. Some candidates will have more experience than others. Some have special areas of expertise that others do not. Some have better instincts, and some are simply more capable than others. While those with less experience may make more mistakes than others, they may also hit more home runs. The key is to determine which candidate will have the best chemistry with the elected officials, but also who can best lead the staff. No matter how technically sound a candidate may be, if he or she cannot build and maintain strong working relationships with the elected officials and staff, he/she will not last long as the community's appointed leader. Of course, experience and expertise are critical and should not be overlooked.

The Internal Candidate / Local Candidate

If an internal candidate / local candidate is among the finalists, elected officials occasionally will assume they already know the individual and just chit-chat instead of actually conducting an interview. Doing so is neither fair to the candidate nor the organization. Internal / local candidates may have ideas about what they would do differently as the City Manager, but have not been willing or able to convey these thoughts to the elected officials, much less act upon them. Unless the same hard questions are asked of the candidate as the external candidates, meaningful comparisons cannot be drawn.

It should also be recognized that a competent, likable, internal / local candidate will have a natural advantage in any job competition. To select the known quantity is a natural, human tendency, particularly in public sector recruitments. It feels comfortable and is viewed as safe. It may also be exactly the wrong thing to do. For example, we have seen governing bodies select

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individuals with whom they were comfortable and assume the individual will grow into the position. In our experience, they generally do not. Once someone has the top position, he/she has no mentors and it is difficult for them to improve in areas where they are weak. There simply is no one to teach them so they focus on the areas where they are strong rather than improving in areas where they are weak.

Further, if the candidate does not do well in the position, then a year or so later the same governing body is struggling with a difficult decision. What should it do with someone who was a valuable employee or friend but who is not providing the necessary leadership? The choices become to continue with the employee even though he/she is not performing up to standards, demote the employee, or terminate his/her employment altogether. None of these choices is attractive, but one must be selected. Someone who was a perfectly good employee in his/her previous position may be lost. Of course, this same candidate, with a few more years of experience and mentoring, might make an excellent City Manager.

Please understand that we are not trying to discourage the hiring of an internal / local candidate. We do believe, however, that the internal / local candidate must be examined just as critically as the other candidates. We have found it helpful to ask the internal / local candidate what problems he/she sees in the organization and what he/she would propose to resolve them. If the individual does not have a good, specific answer to that question, then he/she is not ready to be the community's City Manager. External candidates will not have the same depth of experience or knowledge about the government, so it would not be fair to expect the same response to this question as you would from the internal / local candidate.

Another thing to keep in mind is that, if an internal candidate is hired as the City Manager, then a search must begin to fill his/her position. If an outside candidate is hired as the manager, in most cases the internal candidate stays, but is somewhat disappointed. Of course there is also the risk that the internal candidate may be so disappointed that he/she decides to seek employment elsewhere.

Possible Interview Questions

The questions on the next few pages may be useful in determining the information that you need. There are undoubtedly others. The point is to ask the questions that you feel will give you the best idea of what the candidate believes, how he/she will work with you and with the staff, and whether or not he/she is a good match for the community.

The following topics and questions are divided into four groups. The first set contains standard introductory questions covering an individual's background, management style, and experience. The second set is designed to provide information about how the candidate will interact with the elected officials and staff, and to focus on particular issues that may be of concern to the community. Set III should always be asked at the end of the interview. The fourth section outlines what questions should not be asked as they could provoke a law suit.

Possible Interview Questions

Since time will not permit asking all the questions, you should select the ones that are most important to you.

Topics / Question Set I:

1. Tell me about yourself.
2. Why are you interested in our community?
3. What is your management style?
4. What would your staff say about you as a manager?
5. What would your elected officials say about you?
6. Have you fired people? How did you handle it? How did you feel about it?
7. What do you think your strengths are?
8. What do you think your weaknesses are?
9. What has been your biggest success? Tell us about it.
10. What has been your biggest failure (or mistake) in your career? What did you learn from it?
11. If you were asked to cite one particular situation or event in your career that gave you the greatest satisfaction, what would it be?
12. What would you do during the first six months in our community?
13. What do you hope to learn in the first six months in our community? What do you expect to teach us?
14. What do you believe to be the challenges and opportunities facing our community? How are these likely to change in the future?
15. The City wants a City Manager with new ideas and lots of energy. How do you meet those requirements?

Possible Interview Questions

16. What is your value system? How will your values determine how you manage our City?
17. Why should we select you to be our next City Manager?
18. Is there anything else you would like to tell us?

Topics / Question Set II:

1. Explain what you believe the role of our City Manager should be.
2. What are the three most important commandments for a City Manager?
3. Can you give me a breakdown of your typical day as a City Manager?
4. How would you view your relationship with the elected officials?
5. How will you go about building a strong relationship with elected officials? How will you maintain it?
6. How do you build consensus on an elected body when it is deeply divided?
7. What information do you think the governing body needs to have concerning day-to-day operations and on-going projects?
8. How will you keep the elected officials informed?
9. What kind of direction do you expect to get from the elected officials? What will you do if you do not feel they have made it clear how they want the staff to precede on a particular issue?
10. There is an expression, "A good City Manager only needs to be able count to three." Of course in our case, that would be five. Could you please comment on that statement?
11. What do you do when your views on handling a situation differ from those of the governing body as a whole?
12. What will you do if a particular elected official disagrees with how you believe a situation should be handled?

Possible Interview Questions

13. What will you do when an elected official contacts a department head directly and tells him/her to do something?
14. What would you do if an elected official walked into your office and told you that you needed to repaint it navy blue?
15. Can you tell your elected officials what they need to hear rather than what they want to hear?
16. How well do you accept criticism? Please give me an example of a case where an elected official suggested you could improve your performance. How did you respond and what did you do?
17. What are your core values and which one is most important to you?
18. Tell us something unique about yourself.
19. Can you describe an ethical issue that you have had to deal with in your career and how you handled it?
20. As a manager, how do you evaluate your own performance?
21. What do you believe to be the highlights of your career over the past three years?
22. How will you build a strong relationship with our existing staff?
23. What kind of relationship do you want to have with the senior managers and the rest of the staff, and how will you establish it?
24. How many people reported to you in your last job? How did you keep them informed of the community's priorities? What do you intend to do differently if you are appointed here?
25. How will you keep the general employees informed of the elected officials' priorities?
26. To what extent do you believe contact with citizens and citizen's groups is important? How do you typically handle this responsibility? How will you build relationships with the community?
27. How do you plan to communicate with our residents?

Possible Interview Questions

28. How many community meetings have you attended in the last six months? What was the last one you attended and why did you go?
29. Sensitivity to different genders, races and ethnic groups is a priority for us. Can you provide us with some specific examples of how you have demonstrated your commitment to these principles in the past?
30. People are: _____. Please fill in the blank and explain your choice of that word or words.
31. How will you go about identifying the organization's strengths, weaknesses, and opportunities for improvement? Once you have identified them, how will you go about making changes?
32. How will you approach the short and long range planning processes? What system do you use to set goals and objectives? How do you monitor progress against these goals and objectives?
33. Please describe your experience with strategic planning.
34. Please outline the similarities between our community and the previous communities you have served.
35. History defines the future. Can you please define the character of our community based on what you have seen and then tell what you would like it to look like in 25 years?
36. What will you do if you feel an employee is not doing his/her job in a manner you feel is satisfactory?
37. What do you do when you observe an employee - who works for a department director - who is not doing his/her job the way you think it should be done?
38. Describe the steps you would take if you needed to recruit, say, a new Planning Director.
39. Please describe a situation where you have had to "step up and lead" relative to a controversial issue.
40. Describe a situation where you had to build a team to solve a problem.

Possible Interview Questions

41. Please give an example of organizational restructuring you initiated. What was the reason for the restructuring and was it successful? Would you do anything differently if the situation presented itself again?
42. How would you go about raising morale in our organization?
43. Please describe your general experience in human resources administration including the development of personnel policies and performance appraisal systems.
44. Please describe your experience with and philosophy of labor/management relations.
45. What qualities make someone successful as a negotiator in labor contract discussions?
46. Have you sat at the bargaining table in contract negotiations? Tell us about the experience and what you learned from it.
47. Please identify the most difficult situation you have encountered with a labor union and how it was resolved.
48. What would labor unions you have dealt with say about you?
49. Describe an incident in which you played a role that embarrassed your government or caused it difficulty. What did you learn from it?
50. Are there any events in your professional or personal life that may reflect negatively upon your performance or which would be awkward or embarrassing to us if reported upon by our local/regional news media?
51. What are your long term career goals?
52. What areas of your skills/professional development do you want to work on at this point in your career?
53. How do you insure that your staff continues to develop professionally?
54. Are you willing to take calculated risks?
55. What kind of decisions did you make in your last job?

Possible Interview Questions

56. What kinds of decisions are difficult for you to make?
57. What personal skills do you feel are necessary for someone to be successful in this position?
58. What particular personal characteristic do you have that will most benefit our residents if you are hired?
59. What is your average workweek now, and what would you expect it to be if you came to work here?
60. Why did you leave your last job? (Ask if the candidate is in transition.)
61. Why do you want to leave your current job? (Ask if the candidate is currently employed.)
62. From what you know about our community, what is the most burning issue that we face, and how would you address it?
63. Strong fiscal management skills are central to this position. Please describe the most challenging budgeting situation you have encountered and how you reacted.
64. What innovative, cost saving programs and projects have you initiated and how successful were they?
65. What is your philosophy for developing and implementing a budget for our City?
66. Would you consider implementing a Zero Based Budget?
67. What techniques would you employ to develop and implement a balanced budget in these difficult economic times?
68. What techniques have you employed to reduce payroll expenses without layoffs and without reducing the level of service we provide?
69. How do you encourage staff to stay in your organization?
70. Give me some examples of cases where you have introduced new technologies to improve productivity or service delivery in a local government organization?

Possible Interview Questions

71. Like many communities, we are experiencing rapid growth and development. What would you do to protect the character of the community while permitting acceptable growth?
72. Do you view growth as a positive?
73. Tell us about your experience closing the gap between what is the ideal amount of infrastructure (roads, drainage, facilities, etc.) and what is actually present.
74. What experience do you have with economic development?
75. Please describe your experience in working with a business community, Chamber of Commerce, downtown business association, etc.
76. Tell us about an economic development project that you are particularly proud of and your role in its success.
77. What sort of concessions would you ask of developers when discussing their desire to bring a new development to our community?
78. Can you tell us about your experience with Tax Increment Financing?
79. Do you think it is necessary or appropriate to redevelop this community? If yes, how would you go about redeveloping it?
80. Do you feel it is desirable to bring new businesses to the community? What kind of businesses would you try to attract?
81. What actions would you pursue to bring jobs to our City? What sectors would you target?
82. What attributes of the City would market to businesses that you want to attract to our community?
83. Describe your experience with out-sourcing and your methodology for evaluating the cost-effectiveness of outsourcing.
84. What is your opinion of sole source procurements?
85. How will you balance the need for timely/efficient procurement with the need for checks and balances?

Possible Interview Questions

86. How would you go about building a good relationship with the County?
87. How would you go about building a positive relationship with other governments with whom you will have to deal if you are selected for this position?
88. Describe your experience in dealing with state agencies.
89. Describe your experience dealing with federal agencies.
90. Describe your experience obtaining grants. What agencies would you approach for grants? What kind of grants do you think would benefit us?
91. Are there other external sources of funds (beyond grants) that you would seek out?
92. Have you ever been involved in initiatives to contract out services? Tell us about them. Did these efforts succeed?
93. How do you feel about succession plans for managers and directors? Do you presently have one in your City?
94. What experience do you have in developing and implementing policies and programs that further the goal of green and sustainable communities?
95. Describe the kind of organization for which you would like to work. If you could change one thing in your current (or most recent) job, what would it be?
96. Who do you view as your customers? How will you interact with them?
97. What great idea have you had that did not go anywhere and why did it fail?
98. If we were look at your personnel file, what would we find? Would there be anything negative?
99. How do you respond when a resident walks into City offices and wants to meet with you about an issue that concerns him/her?
100. Would you make yourself available for two hours a week to see the public on a first-come, first-served basis?
101. How would you address a situation where an employee places the City in an embarrassing light?

Possible Interview Questions

102. What do you see as the primary drawback to being the City Manager of our community? What do you know about our operations and current employees?
103. If we hire you, would you seek a salary increase every year?
104. If the community decides to install a plaque somewhere in your honor after you leave your current job, what would it say?
105. If they decide to give you a roast, what would people say about you?
106. What was the most pertinent question you were asked today by any one of us, and how did you answer it?
107. Would you favor setting up a non-profit to deal with the feral cat and stray dog population in our community? [This question may seem a bit odd but it tests the ability of a candidate to think on his/her feet.]
108. Assume our 100th anniversary is next year. What ideas would you offer to make it a rousing success?
109. What was the last book you read and why did you choose it?
110. Who is your favorite comedian and how do you incorporate humor in your management style?
111. What did you do to prepare for today's interview?
112. If you accept this position, how long do you expect to stay?
113. How do you spend your spare time? What are your hobbies?
114. How would you describe your ideal day off?
115. Why should we hire you?

Topics / Question Set III:

1. If you are selected as the successful candidate, and understanding that pay and benefits are matters for negotiation, tell us in broad terms what sort of compensation package you would expect?

Possible Interview Questions

2. If we hire you, how long would you expect to stay in the position?
3. What kind of severance package would you expect if you were terminated?
4. When would you be available to start work?
5. Is there anything which we have not discussed today that you would like us to know?
6. Are there any questions you would like to ask us?

Topics / Questions Set IV: Topics to Avoid During the Interview Process

A large body of legislation has developed over the years addressing civil rights and race/gender/age discrimination. Questions in these areas should be avoided during the interview process. The process of interviewing and selecting an applicant is no longer a simple matter of conducting a casual conversation and hoping to learn a candidate's strengths, weaknesses, likes, and dislikes. Various civil rights laws now make the average interview a process that should be approached with extreme caution. However, if you keep in mind certain basic rules, you will facilitate the process and avoid problems.

In most instances, asking inappropriate questions may raise an inference of either discrimination or retaliation against a particular candidate. In other instances, such as those involving issues of mental or physical health, inappropriate questions are presumptively discriminatory. Therefore, the interviewer must avoid questions relating to the following:

1. Political affiliation, political views, or voting history.
2. Religious beliefs or practices.
3. A candidate's race.
4. A candidate's age.
5. A candidate's national origin or ancestry.
6. A candidate's family and whether or not they would be willing/able to join them in the new City.
7. A candidate's desire to have children or raise a family.
8. Pregnancy and other gender related issues.
9. Sexual orientation or sexual practices.
10. Marital status or personal and private relationships.
11. Potentially controversial issues of race, gender or ethnicity.
12. A candidate's availability due to serving as a reserve in the military.

Any information a candidate may *volunteer* during the interview process regarding these matters does not render the interview invalid or otherwise taint the process. Consequently, open-ended questions, such as asking if the candidate wants to reveal anything else to the City that has not already been covered, are not prohibited. In fact, they can sometimes provide valuable insight into a candidate's views and perspectives.

Topics / Questions Set IV: Topics to Avoid During the Interview Process

With regard to issues of physical or mental health, many questions are appropriate after a conditional offer of employment is made, but must be avoided beforehand. The interviewer must avoid questions relating to the following topics:

1. A candidate's medical history.
2. Past workers compensation claims.
3. Past use of sick leave.
4. Health of a candidate's family members.
5. Any obvious physical or mental impairment of the candidate. However, it is permissible to ask if the candidate is able to perform the essential functions of the job for which he/she is applying. A better practice is not to ask this type of question at all. Of course, from a practical point of view, it is hard to imagine anyone answering negatively.
6. A candidate's frequency of illegal drug use or addiction. However, it is permissible to ask if the candidate ever used illegal drugs, and if so, the last time he/she did so. Once again, this is a very delicate area that can create significant problems for the employer if the questioning is intrusive.
7. Alcoholism or the frequency of alcohol consumption.

The questions listed above which relate to medical conditions may properly be asked of a candidate after he or she has received a conditional offer of employment. Before an offer is made, however, the questions must be avoided.

If you need further assistance in crafting proper interview questions, please do not hesitate to contact us for further guidance.

Suggested Interview Schedule

Fernandina Beach - City Manager Interview Schedule - DRAFT

8/7/2023

September 11th 1:00 p.m.: Tour of City. Meet at City Hall: 204 Ash Street, Fernandina Beach, FL.

3:30 p.m.: Cheese and cracker reception with staff.

5:00 p.m.: Finalists have free time.

5:30 p.m. to 7:00 p.m.: Finalist Reception at a location to be determined.

September 12th ***One-on-One Interviews at City Hall***

Time	Antun	Ayscue	Bean	Ross	Sturges
8:45 a.m.	Coffee, tea, danish and fruit				
9:00 to 9:40 a.m.	Finalist #1	Finalist #2	Finalist #3	Finalist #4	Finalist #5
9:40 to 10:20 a.m.	Finalist #5	Finalist #1	Finalist #2	Finalist #3	Finalist #4
10:20 to 11:00 a.m.	Finalist #4	Finalist #5	Finalist #1	Finalist #2	Finalist #3
11:00 to 11:10 a.m.	Break				
11:10 to 11:50 a.m.	Finalist #3	Finalist #4	Finalist #5	Finalist #1	Finalist #2
11:50 a.m. to 12:30 p.m.	Finalist #2	Finalist #3	Finalist #4	Finalist #5	Finalist #1

12:30 to 1 p.m.	Light lunch for Finalists and Commission Members
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Special Meeting - Interviews with the Commission as a Whole at City Hall

Time	Name
1:00 to 1:05 p.m.	Review procedures for interviews
1:05 to 1:35 p.m.	Finalist #1
1:35 to 2:05 p.m.	Finalist #2
2:05 to 2:35 p.m.	Finalist #3
2:35 to 2:45 p.m.	Break
2:45 to 3:15 p.m.	Finalist #4
3:15 to 3:45 p.m.	Finalist #5

4:00 p.m.: Commission meets to make a selection or discuss next steps.

September 19th ***If it has not already been done, the Commission selects next manager and appoints a negotiating team to develop an employment agreement with the selected Finalist.***



Section 4

Andrew A. Butterfield

*Fernandina Beach
City Manager Candidate Report*

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Cover Letter and Resume

Section 4

Andrew A. Butterfield 230 N. Tessier Drive, St. Pete Beach, Florida 33706
813.504.6622 / andybfield@gmail.com

July 20th, 2023

I would like to be the next City of Fernandina Beach City Manager and appreciate your consideration of my application. I have a passion for a sense of community; a commitment to preserving our environment; and a desire to work for the common good – the health, safety, and well-being of all residents and visitors being paramount. My experience includes my current work in the municipal government of another beautiful and dynamic coastal Florida city, the City of St Pete Beach. I also served as a large multi-service military base deputy commander, naval base commander, large organization (3000+ personnel) deputy chief of staff, squadron commander, and department head while in uniform – duties with direct parallels in municipal government. I served at commands in Jacksonville and Mayport for a decade and so am very familiar with – and absolutely love – the great northeast corner of Florida. I enjoy hard work, strive for continual innovation and improvement, and seek collaboration with others. My knowledge, education, and skills directly correlate to the duties of City Manager.

I truly enjoy public service and am effective at it. Under my stewardship as Operations Manager for the City of St. Pete Beach, our Beach Division's performance led directly to designation as "#1 Beach in the U.S." by TripAdvisor – a first for our great city. I serve on three county-wide boards in Pinellas involving waste management financing, recycling, and Veterans' issues. I immensely enjoy working here and know that my efforts have made a real and positive difference for residents, visitors, and city staff. It is just the latest professional experience that has led to my interest in serving as a City Manager, and my confidence that I am ready to ably serve your city.

I have long managed large budgets and supervised at multiple levels and staff sizes, from a dozen to thousands, at times with over twenty direct reports. I earned my second Masters, a Master of Public Administration and Public Policy, at Harvard University's Kennedy School of Government, then went to Brown University to inaugurate their Office of Veterans' Affairs. While at Brown I suffered a serious injury that led me to leave earlier than planned. After a full recovery, a wide variety of volunteer work ensued before I returned to full-time work.

I'm excited at the prospect of being part of your Team, working hard for citizens, business owners, visitors, and staff, each of whom are undoubtedly facing the challenges of smartly managing growth, while also maintaining the City's existing assets and distinctive character.

I would welcome an opportunity to interview, and I thank you for the opportunity to apply.

Sincerely,

//signed//

Andrew A Butterfield

Andrew A. Butterfield, MPA/MA

LEADER / MUNICIPAL MANAGER / COLLEAGUE / VETERAN

813.504.6622 | andybfld@gmail.com | 230 N Tessier Drive, St Pete Beach

CUSTOMER-FOCUSED CITY MANAGEMENT PROFESSIONAL

Visionary city representative who leverages administrative and municipal government experience to implement strategic practices and policies that promote community growth, organizational responsiveness, inter-governmental cooperation, and long-term financial stability. Goal-oriented decision-maker with excellent communication skills, solid reputation of integrity, and strong commitment to customer care. Proactive servant-leader known for maximizing effectiveness of city employees and elected officials through accountability and fact-based recommendations on key community issues.

Leadership Profile

- ✓ **20+ years of operations, management, and leadership experience** in local government, public service, and diverse military settings.
- ✓ **Prioritizes efficient resource stewardship and building relationships** with community members, staff, and elected officials to improve municipal services.
- ✓ **"Begin with the end in mind. Communication is key. Well-trained personnel are the most valuable resource. Leave a place better than you found it."**

Areas of Expertise

- City Operations
- Strategic Planning
- Budgeting
- Intergovernmental Relations
- Resource Utilization
- Personnel Management

PROFESSIONAL EXPERIENCE

CITY OF ST. PETE BEACH, PUBLIC WORKS DEPARTMENT

St. Pete Beach, FL

Operations Manager

2019-Present

Recruited to provide stability and ethical leadership following difficult management transition. Oversees Ops Team of 10+ and budget, managing operations across all divisions. Knowledgeable Strategic TF, ICMA, and APWA member.

[Strategic Planning](#) | [Municipal Operations](#) | [Vehicle Fleet Maintenance](#) | [Personnel Training](#)

St. Pete Beach named "Best Beach" by TripAdvisor for the first time in 2021 under his Beach Division stewardship

- **Operational Leadership:** Drives efficiency, productivity, and alignment across local government through collaboration with all City departments and elected officials.
- **Asset Management:** Maximized asset value with proactive maintenance of City facilities and \$5M vehicle fleet. Improved efficiency of vehicle repairs by creating mechanic workspace and hiring additional mechanic.
- **Organizational Improvement:** Revitalized City operations to focus on preventative planning. Reorganized staff schedules to implement weekend hours of operation to support peak City activity.
- **Financial Management:** Saved funds and improved public safety communications by establishing in-house sign printing capabilities. Efficiently achieved all annual objectives, coming in under budget each year.
- **Intergovernmental Relations:** Strengthened regional partnerships as City rep on 3 Pinellas County boards: Solid Waste Technical Management Committee, Pinellas Partners in Recycling, and the Veterans' Task Force.
- **Personnel Functions:** Achieved 100% retention by transforming department culture to create positive work environment. Elevated performance with improved training program and bi-annual review process.

BROWN UNIVERSITY

Providence, RI

Director, Office of Veterans Affairs

2013-2014

Hired to re-establish Veterans Affairs services after decades of dormancy. Recruited and trained 3 direct reports to help Veterans effectively utilize GI benefits and navigate university experience. Reported to Dean of Student Affairs.

[Special Event Operations](#) | [Program Administration](#) | [Intergovernmental Partnerships](#) | [Community Liaison](#)

- **Strategic Initiatives:** Strengthened on-campus support for Veterans by re-instating Veterans Affairs program. Developed various ROTC commissioning options, enrolling 3 students in Army ROTC.
- **Advocacy & Engagement:** Increased visibility of Veterans through on-campus and community events. Garnered support from military agencies and state elected officials, including two RI senators.
- **Community Partnerships:** Raised crucial financial support in collaboration with Veteran alumni.

Section 4

Andy Butterfield | (813) 504-6622 | andybfield@gmail.com | Page 2

MILITARY SERVICE	
JOINT BASE MCGUIRE-DIX-LAKEHURST	Trenton, NJ
Deputy Commander & Commanding Officer	2009-2012
Founding senior leader of nation's first Tri-Service Joint Base with dual responsibilities as Commanding Officer of Naval Support Activity at Lakehurst. Responsible for executing complete integration of 3 neighboring military bases.	
Operations Policies & Procedures Budgeting Community Relations Organizational Improvement	
• Master Plan Execution: Achieved compliance with federal legislation and regulatory guidelines during consolidation of 3 independent military bases, including 80+ units from across all military branches. • Municipal Oversight: Streamlined on-base operations through management of programs, policies, and budgeting for all municipal systems and personnel. • Safety & Productivity: Prioritized clear communication to ensure efficient interoperability between military counterparts at two busy airfields, recording zero aviation mishaps during entire tenure. • Community Engagement: Built strong partnerships with neighboring towns by establishing working relationships with elected officials and local leaders to identify creative initiatives and solutions. • Crisis Leadership: Coordinated on-base disaster relief accommodations and resources for nearly 1K Haitian citizens following devastating earthquake in January 2010.	
UNITED STATES SPECIAL OPERATIONS COMMAND (USSOCOM)	Tampa, FL
Deputy Chief of Staff Deputy Director	2005-2009
Reported directly to Chief of Staff for Commander of USSOCOM. Managed multiple offices including Public Affairs. Oversaw 30 direct reports and Care Coalition liaison to support partnership with Wounded Warriors.	
Strategic Planning Personnel Operations Growth Management Communication	
• Organizational Improvement: Drove unprecedented growth of Special Operations Forces, capabilities, and physical infrastructure via administrative leadership and strategic planning for Quadrennial Defense Review process. Helped plan budget to ensure adequate facilities to accommodate growth. • Operational Effectiveness: Synchronized global activities for Special Operations Forces, coordinating efforts for 3K+ military, civilian, and contract vendors/personnel.	
UNITED STATES NAVY	Deployed to Iraq, Kuwait & at sea
Squadron Commanding Officer & Executive Officer Naval Officer Joint Specialist	1985-2005
Led 250-member squadron and managed human capital, training, budgeting, and long-range planning efforts.	
Leadership Resource Allocation Performance Monitoring Strategic Initiatives	
• Resource Utilization: Managed budget and assets to support both on land and at sea operations. • Collaboration: Forged partnerships across military branches and government agencies to achieve objectives. Negotiated with Army to utilize existing housing resources to accommodate Navy troops. • Personnel Retention: Established voluntary fitness program to help enlisted individuals better prepare for increasingly rigorous physical evaluations, decreasing dismissals due to poor performance. • Safety Standards: Led squadron to Aviation Excellence Award as expert instructor with 3K+ flight hours.	
EDUCATION	
Master of Public Administration (MPA) Harvard University, Harvard Kennedy School • <i>Cambridge, MA</i>	
Master of Arts (MA) US Naval Post-Graduate School • <i>Monterey, CA</i>	
Bachelor of Science (BS) US Naval Academy • <i>Annapolis, MD</i>	

Candidate Introduction

Andrew A. Butterfield

EDUCATION

Master of Public Administration, Harvard University, John F. Kennedy School of Government, Cambridge, Massachusetts

Master of Arts in National Security Affairs, U.S. Naval Post-Graduate School, Monterey, California

Bachelor of Science in Naval Science and Political Science, U.S. Naval Academy, Annapolis, Maryland

EXPERIENCE

Operations Manager, City of St. Pete Beach, FL	2019 – present
Director of Veteran Affairs, Brown University, Providence RI	2013 – 2014
Deputy Commander, Joint Base McGuire-Dix-Lakehurst, NJ	2009 – 2012
Commander, Naval Support Activity Lakehurst, NJ	2009 – 2012
Deputy Chief of Staff, U.S. Special Operations Command (USSOCOM)	2007 – 2009
Deputy Chief of Quadrennial Defense Review, USSOCOM, Tampa, FL	2005 – 2007
Helicopter Squadron Commander, Jacksonville, FL & deployed overseas	2003 – 2005
Strategic Planner, U.S. Central Command (USCENTCOM), Tampa, FL	1999 – 2002
US Navy positions, both as a pilot and managing personnel and resources	1987 – 1998

BACKGROUND

The City of St. Pete Beach is a coastal town of some 10,000 residents at the southernmost end of Pinellas County. Its main industry is beach tourism, as it boasts some of the most beautiful beaches on the Gulf of Mexico. While the City is literally an island (albeit now connected to the mainland by three bridges), it figuratively cannot act as an island, since the city lacks some important services of its own. Though there are such assets close by in neighboring municipalities, the city has no hospital, no middle or high school, or even its own police force. This makes it critically important to foster and maintain good and productive communication and cooperation between neighboring municipalities, as well as with Pinellas County and State of Florida service providers. It also means that adequate means of transportation are crucial to the city running smoothly.

To this point, the main thoroughfares through the City of St. Pete Beach – including the aforementioned 3 bridge entrances to the City – are each State Roads. As such, it is crucial to maintain excellent communication with the cognizant state agencies. This includes FDOT, of course, but also FDEP, since Gulf Boulevard – the longest and main through-road in the City – is also a designated Wildlife Corridor. A good working relationship with each has been

Andrew A. Butterfield

established, where we the City help provide “eyes and ears” to the state agencies, each of which has a vast portfolio. This communication and cooperation pays dividends in helping ensure that – in a world of limited resources – the most important priorities locally have a better chance of being addressed first. It is in the City staff’s interest to help the State succeed.

There are some 400 commercial businesses in the City. The largest are hotel complexes: the historic Don Cesar, the Tradewinds Resort, and the Sirata top the list. Each employ hundreds, most of whom reside outside the City so have commuting needs, and each is currently looking to expand. The City is “built out” – there simply are very few significant size parcels open – so they are each looking to expand within their current footprint. This helps both the County and the City; St. Pete Beach provides far more than its fair share in bed tax receipts to the County.

The hotels’ desire to grow in a proven lucrative area and thriving business environment is understandable; at the same time, a citizen group’s ongoing efforts to “tap the brakes on growth”, as they put it, is also understandable. The fears are real regarding the limiting of beach access, increased vehicular traffic, and degraded quality of life for residents. Strong City leadership is crucial to refereeing and balancing these sometimes directly competing interests.

The City Staff has some 120 employees with six departmental directors reporting directly to the City Manager, with the Manager reporting to the 5-member City Commission. I have reported for the past four years to Mr. Michael Clarke, Director of Public Works. I have directly supervised between 10 and 17 employees during that time. The City is overdue for a manpower study. After years of my recommending and requesting a study to ensure we are properly aligned, manned, and competitively compensating our people, a study is finally imminent. I believe a periodic assessment by an external expert is critical to ensuring any organization does not “get stuck” and is properly aligned to handle new missions and utilize previously unavailable technologies which may shift manpower requirements.

The general fund budget at the City of St. Pete Beach is over \$21M, while the total budget exceeds \$58M. Reserves exceed \$20M.

The 3 most important issues facing the City of St. Pete Beach:

- Balancing the tension between pro-development and anti-development contingents who may be challenged to find common ground.
- Increasing resiliency through infrastructure improvement and the funding challenges that come with those efforts.
- Completing an investigation facing the current City Manager and rebuilding the staff and staff morale.

GENERAL, MANAGEMENT STYLE AND EXPERIENCE

After a life of constant travel and motion, I chose the Gulf Coast of Florida as my home. Still interested in public service, four years ago I reached out to local mentors re: how municipal government works. After my flying days were over, I thoroughly enjoyed and excelled at my last two assignments in uniform which each involved running large organizations and budgets. These positions were in Florida as Deputy Chief of Staff at US Special Operations Command, where I had dozens of direct reports and helped run a staff of over 3,000; and in New Jersey as Joint Base Deputy Commander / Naval Support Activity Commander at Joint Base McGuire-Dix-Lakehurst, running day-to-day operations at an installation of some 40,000 acres which straddles two counties. The base also covers two congressional districts, operates two airports, and hosts both a state and a federal prison, along with nearly 100 separate military units known as tenant commands. One of my biggest achievements was doing my part to knit together these disparate units and three previously separate military bases into one strong integrated Team. My biggest mistakes, which I strive not to repeat, have been when I've not prioritized the time to prepare. I learned long ago that failure to plan is a plan to fail.

I have experience running large organizations, finding and working with other stakeholders, building consensus, communicating at all stages, and moving forward with multiple projects simultaneously. It strikes me that, while perhaps not a traditional path toward the role of City Manager, the path I have taken has provided the skills, knowledge and experience that make me an excellent candidate for City Manager. My strengths include a relentless search for improvement and for win/win results. I revel in being part of a Team where everyone is working together to make things better for all. My weaknesses include sometimes being a bit naïve that not everyone is like-minded and may have hidden agendas. I guard against that by striving to listen more than I speak. I can do public speaking, as needed, but am also quite content to stay 'behind the scenes' and let the elected officials speak directly to those who put them in office.

I try to constantly stay challenged and keep learning and strive likewise to develop my staff. Every employee has a career to manage, and I do my best to keep the best employees around by providing opportunities for professional training, education, certifications, and advancement. Encouraging work/life balance for employees helps keep corporate knowledge around. Not everyone needs to be kept around, however; while I don't enjoy terminating employees, it is part of the job, and I do it when necessary. Documentation of sub-standard performance is key.

The challenges I see facing Fernandina Beach mostly revolve around growth, and the municipal government's ability to do its part to keep infrastructure needs ahead of the arrival of even more vehicular traffic and people – all while not ignoring the already-developed areas that still need attention, or the people already here. Improving education to facilitate the development of a flexible and nimble workforce is important, and affordable housing and ending homelessness are timeless issues which need enduring attention. As good as things are, there is always much to be done.

Andrew A. Butterfield

If I become City Manager, during the first busy months I will plan to meet with the elected officials, the City Staff, citizen groups, all stakeholders, other city managers within the County, and relevant County and State agencies / representatives to ensure we are all working in sync. I will work hard to understand the Commission's goals and assess the financials of the City. I will strive to be familiar with all federal, state, county and city laws, codes, ordinances, and guidelines. I will assess whether we have the right performance-measuring tools in place.

I do not believe any community activists would have any negative comments about me or my work. That said, I testified honestly during the ongoing investigation of the current City Manager. As a result, the City Manager and a former City Commissioner may have a negative opinion of me. I strive each day to treat everyone fairly.

In my free time, I enjoy walking our dogs, swimming and biking and beach-walking, a game of scrabble or a crossword, and riding our horse Fallon.

ADJECTIVES / PHRASES TO DESCRIBE MYSELF

- Life-long learner
- Positive and proactive
- Ethical
- Service-minded
- Strategic goal oriented
- Team over self
- "Big tent guy"

REASON FOR DEPARTING CURRENT POSITION

I've found meaningful parallels between municipal governance and the command / deputy / staff positions I once held in uniform. I've met and worked with the same caliber of people in each realm: servant leaders with a strong work ethic who can make all the difference in reaching positive outcomes. One of those is Mr. Michael Clarke, a great mentor who has helped me transition into municipal government.

I want to continue on this second path and wish to do so in a position where I might be able to accomplish the most good for the most people. With the experience I've gained here at another classic Florida beach town, combined with my many years living in nearby Duval County, my sense is we could be a great match.

I can be available within 4 weeks of a hiring commitment from the City Commission so that I might give the City of St. Pete Beach proper notice of my impending departure.

Andrew A. Butterfield

MOST RELEVANT PREVIOUS SALARY

My most relevant previous compensation was as a Joint Base Deputy Commander and Naval Support Activity Commander, earning approximately \$120K annually (in 2012 dollars).

IN CLOSING

Thank you for your consideration of my application. I hope this has been informative, and I am available to provide more information as needed.

//signed//

Andrew A Butterfield

CB&A Background Checks

**Background Check Summary for
ANDREW “ANDY” ALDEN BUTTERFIELD**

Criminal Records Checks:

Nationwide Criminal Records Search	No Records Found
County	
Pinellas County, FL	No Records Found
Providence County, RI	No Records Found
State	
Florida	No Records Found
Rhode Island	No Records Found

Civil Records Checks:

County	
Pinellas County, FL	No Records Found
Providence County, RI	No Records Found
Federal	
Florida	No Records Found
Rhode Island	No Records Found

Motor Vehicle

Florida	No Records Found
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Credit

Excellent

Personal Bankruptcy

No Records Found

Sex Offender Registry

Not Listed

Education

MPA–Harvard Confirmed, MA & BS–
U.S. Naval Post/Academy – Pending

Employment

Confirmed

Social Media

Nothing of Concern Found

**Background Check Summary for
ANDREW “ANDY” ALDEN BUTTERFIELD**

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

**Background Check Summary for
ANDREW "ANDY" ALDEN BUTTERFIELD
Personal Disclosure**

Personal Disclosure Questionnaire

Name of Applicant: ANDREW A. BUTTERFIELD

The following questions are designed so that we will be able to make full disclosure to our client concerning your background. Please answer them honestly. Cutting corners or misrepresenting your past will result in you being eliminated from all further searches conducted by this firm. We understand that frivolous charges are sometimes made and that charges do not mean you were guilty. We also understand that you may have been wronged and needed to seek compensation. The bottom line is that we want to be certain that our client is fully informed. If you have any questions, please contact us for clarification.

Please explain any yes answers on a separate sheet of paper.

1. Have you ever been charged or convicted of a felony?
Yes ☐ No ☒
2. Have you ever been accused of or have been involved in a domestic violence or abuse incident?
Yes ☐ No ☒
3. Have you ever declared bankruptcy or been an owner in a business that did so?
Yes ☐ No ☒
4. Have you ever been the subject of a civil rights violation complaint that was investigated or resulted in a lawsuit?
Yes ☐ No ☒
5. Have you ever been the subject of a sexual harassment complaint that was investigated or resulted in a lawsuit?
Yes ☐ No ☒
6. Have you ever been charged with driving while intoxicated?
Yes ☐ No ☒
7. Have you ever sued a current or former employer?
Yes ☐ No ☒
8. Please list links to all your social media accounts (Facebook / Instagram / LinkedIn / Twitter, etc.) and your personal web page if you have one. LINKED-IN : ANDREW A BUTTERFIELD
9. Is there anything else in your background that, if made public, would cause you, our client or our firm embarrassment if it came to light through the press or any other mechanism?
Yes ☐ No ☒
10. Please provide a list of any lawsuits in which you are or have been a party either as plaintiff or defendant.
N/A

Attested to:

oe BHF

Signature of Applicant

Please email this form via PDF DOCUMENT to Monique@cb-asso.com or via fax to (561) 621-5965 **no later than 5:00 PM MST 07/28/2023.**

(Note: Please be sure to sign the form with your actual signature if you are sending Fax or PDF Document)

CB&A Reference Notes

Reference Notes
Andrew “Andy” Butterfield

Mike Clarke – Public Works Director, St. Pete Beach, FL 727-363-9243

Mr. Clarke has known Mr. Butterfield since 2019. Mr. Butterfield’s job performance has been superior. He can be given a task and Mr. Clarke does not have to follow up or worry about it. He is always pleased with Mr. Butterfield’s work. Mr. Butterfield is very good at keeping others informed and he has a good financial skillset.

Despite some challenges in the various departments, Mr. Butterfield maintains a cordial relationship with everyone. He does extremely well when hiring personnel. He is very keen on updating the job description when a position opens and is graceful in the interview process. The fact that they have not had anyone leave the department in a very long time shows his success in hiring. His decisions in general are good.

While Mr. Butterfield’s role is more internal facing, he is active in the community and participates in external driven events like HOA meetings. He also sits on Boards and Committees both in the City and in the County. He is very graceful when working with the public.

St. Pete Beach has a small neighborhood community with narrow alleyways. Garbage collection has always been done in the alleyways, but the alleyways can no longer support the vehicles. Mr. Butterfield has the support of the organization to pull garbage trucks out of the alleyways and is coordinating the effort to get the word out to residents in the community. He met with the trash collection team to resolve every issue. The situation is very touchy, but he is handling it nicely.

They have weekly department meetings to update the staff, Mr. Butterfield is the primary operations manager. He handles several tasks and is very tuned in and precise in the allocation of resources to complete tasks and improve operations. When an unhappy resident contacts an elected official, the department is then scrutinized. Mr. Butterfield is given these situations because he handles them so well. He does what he can to make the citizen whole.

Stress is not something that Mr. Butterfield internalizes, he stays true to the profession and the outreach. He provides reliable and exceptional public service, but he cannot make everyone happy. He does what he can without internalizing the stress.

Controversy can happen when a sewer is not working, or construction is happening in front of a residence. How they transmit information, particularly when it is not a public works issue, is a very delicate process. Mr. Butterfield communicates in a way that prevents lawsuits. He is retired military with a security clearance, and his background is clean.

Mr. Clarke would hire Mr. Butterfield in a heartbeat. He would be a good manager because he sees the wisdom of subject matter experts and brings the team together to complete the goals and objectives of the elected body. Mr. Clarke does not want to lose Mr. Butterfield, but he will be an asset to any community.

Reference Notes
Andrew “Andy” Butterfield

Words or phrases used to describe Andy Butterfield:

- Passionate,
- Graceful,
- Leadership,
- Concern,
- Situation acuity, and
- Energetic.

Strengths: Personnel, teamwork, management, organization, leadership.

Weaknesses: Understanding the intricacies of government is challenging for any municipal employee. However, Mr. Butterfield surrounds himself with subject matter experts and leads them to achieve goals and complete tasks.

Jeremy Morris – Former Wastewater Technician, St. Pete Beach, FL 727-768-7830

Mr. Morris has known Mr. Butterfield since 2019. Mr. Morris left St. Pete Beach for a wonderful opportunity with the County. The hardest part of taking the position with the County was leaving Mr. Butterfield’s team. He was an exceptional leader, he expected accountability and rewarded good behavior. He was good with people and was someone the staff looked up to.

Mr. Butterfield came out into the field even when it was not necessary so that he could see operations and know what was happening. He showed up even on the weekends in emergencies to give support, which is not typical of other managers that Mr. Morris worked with.

In the hiring process Mr. Butterfield reviews the resumes but he also involves the staff members that the candidate will work with, which was appreciated. His hires were all successful and those he hired all still employed by the City.

One unusual aspect of Mr. Butterfield’s leadership is that he understands that responsibilities come first but he treats employees with the respect that they deserve. He always went out of his way to do things for others. That said, he does not let friendships cloud his judgement and he never plays favorites. Prior to his arrival a few of the employees did most of the work for the department. He spends time with employees and is a real person, while setting expectations and making sure that everyone on the team is doing their part and pulling an equal share.

Mr. Butterfield was involved in the community and attended Commission meetings. He went out of his way for the public, whether he knew the person or not, and he made sure that everyone was taken care of. He was sent to meet with residents who were not happy about what was happening on their street, and he always followed through to make sure they were happy with the

Reference Notes
Andrew “Andy” Butterfield

result. Many of these individuals called the City to share their appreciation for him and to thank him for following through.

Communication is a strong point for Mr. Butterfield, he communicates more than other managers that Mr. Morris worked with. He involved his staff in areas that they might not typically be involved in like purchasing and the budget. This practice helped bridge the disconnect between the leadership team and the employees on the front line who use the equipment that is purchased. He did very well in managing the budget and encouraged employees to take advantage of training opportunities. He was always timely in completing his work.

Primarily, Mr. Butterfield stayed in his office and coordinated efforts while playing the offense, though he did go out in the field when he needed to. He was always good about providing information and resources so that employees could complete the tasks they were assigned.

Mr. Butterfield has not been involved in anything personally or professionally controversial. Employees have never spoken negatively about Mr. Butterfield, everyone on the staff seems to like and appreciate him.

Mr. Morris would absolutely hire Mr. Butterfield, he is underappreciated and undervalued in St. Pete Beach. He has great potential and would be an incredible manager. Whoever hires him will be winning the lottery.

Words or phrases used to describe Andy Butterfield:

- Respectful,
- Funny,
- Caring,
- Nice,
- Reasonable, and
- Does not play favorites.

Strengths: Very involved, learns what he needs to learn, spends time in the field with the staff, supportive of the staff, gets along with everyone.

Weaknesses: While a stretch, when two people were out in the department Mr. Butterfield filled the gaps but he was trying to cover billing aspects and processes he was not used to. However, it was wonderful to have his help.

Shawn Clark – Utility Maintenance Technician, St. Pete Beach, FL 513-320-0973

Mr. Clark has known Mr. Butterfield since 2019. Mr. Clark has worked both with and for Mr. Butterfield. His job performance is very good. He is very aware of his employees and how they

Reference Notes Andrew “Andy” Butterfield

are doing. He ensures they have the right tools to perform their jobs. He does not just look at an individual problem but sees the systemic issues and addresses them to resolve the issues for the long term and not just the short term.

The employees hired during Mr. Butterfield’s tenure are exceptional. He has been able to bring knowledgeable and skilled individuals to the team. His decisions are good because he looks for long-term solutions.

With the public Mr. Butterfield is very personable and approachable. He reaches out to residents to let them know if they are missing something, like a permit, for what they are trying to do. If they are having a sewer issue, he makes sure they quickly receive the permits they need to move forward. He communicates well with residents, and always goes above and beyond.

Mr. Butterfield does not hold anything back and he keeps the employees very well informed. Their current City Manager is under investigation, and he has been open with the staff. He has encouraged the staff to talk to the lawyers as needed and to tell the truth, whatever their truth is. The situation has been stressful for the organization, and he has been steady and dependable through the process.

Because their organization is on the smaller side, for example the stormwater department consists of two individuals, Mr. Butterfield heavily promotes cross training and teamwork. He does his work as quickly as he can, but he must prioritize, and some things must be pushed to the back burner. However, he always gets back to them and does not forget about them.

Mr. Clark is not aware of any incident in Mr. Butterfield’s past that would concern an employer. While everyone has detractors, everyone that Mr. Clark knows appreciates Mr. Butterfield. He is always willing to talk and listen. He is very approachable.

Mr. Clark would hire Mr. Butterfield in a heartbeat. In his current position he is not able to do all the things that he would like to do. He would do well in a position with more oversight and more power to enact positive change. Any community would be lucky to have him.

Words or phrases used to describe Andy Butterfield:

- Energetic,
- Caring,
- Thoughtful,
- Personable,
- Strategic, and
- Tactical.

Reference Notes
Andrew “Andy” Butterfield

Strengths: Sees the big picture and creates long-term solutions. Very engaged and intelligent.

Weaknesses: He may try and take on a little too much at one time, but he does not have any glaring weaknesses.

Al Johnson – Former Mayor, St. Pete Beach, FL 727-543-2794

Mr. Johnson has known Mr. Butterfield since 2017. Mr. Johnson was running for Mayor and Mr. Butterfield helped with his campaign. Mr. Butterfield was later hired by the Public Works department to be the Media Relations Director.

Mr. Butterfield always did a good job. He was visible in the community, on projects and construction sites. He is former military and ran an entire Base. He was a bit underutilized in St. Pete Beach, but he always performed well and was enjoyable to work with.

During the time that Mr. Johnson was the Mayor, they did a large amount of infrastructure work. Mr. Butterfield had to work hand in hand with the contractors on sewer projects, road rebuilds, and they gutted and rebuilt the library during covid which was a challenge. Mr. Butterfield was excellent from an organizational standpoint. He determined where the responsibilities lie within the scope of work and did a good job keeping the staff and the contractors moving forward while supporting their efforts.

With the public Mr. Butterfield works well, he seems to get along with everyone. He was also well liked by his direct reports. The Public Works Director is also former military, and they had the same mindset and organizational skills. Their department kept the elect officials very well informed and supplied anything that was asked for. When Mr. Johnson had a question, he called Mr. Butterfield directly on matters related to his area. If Mr. Butterfield could not answer the phone at that time, he returned the call within the hour.

When working with residents on projects on their street Mr. Butterfield was always rational and friendly. He handled stress well and remained very even keeled.

Mr. Butterfield replaced an employee who left under controversial circumstances, but he had never been involved in controversy himself. The only people who may have a negative opinion of Mr. Butterfield are employees that were not fulfilling their responsibilities.

Mr. Johnson would hire Mr. Butterfield because he is a capable individual. He is underutilized in St. Pete Beach and has much more talent than his position requires, but he performs it well. Based on his history, he is most likely adept at budgeting. He ran major operations for the military. He is very good at the technical and operational side of the business.

Reference Notes
Andrew “Andy” Butterfield

Words or phrases used to describe Andy Butterfield:

- Business like,
- Direct,
- Approachable, and
- Friendly.

Strengths: Organization, completes tasks, well-liked by those he works with, easy to work with, great interpersonal skills.

Weaknesses: None identified.

Bart Diebold – City Manager, Pinellas Park, FL 727-631-1928

Mr. Diebold has known Mr. Butterfield since 2015. They met through their membership in civic organizations. When Pinellas Park was impacted by a hurricane, Mr. Butterfield reached out to offer equipment and staff to assist in the cleanup and they have been friends ever since. Mr. Butterfield is unbelievable and has helped Mr. Diebold tremendously.

Mr. Butterfield makes good decisions. He is innovative, a change agent, and he maintains operations at a high level. He is not afraid of change, and he leads the organization. He understands that there may be a better way to work.

Mr. Diebold attended a Council meeting to give the City a plaque because they offered to help during the hurricane. At that same meeting Mr. Butterfield gave a presentation on a parks issue. He did very well, his presentation skills are impressive.

Mr. Butterfield is responsive, and he is extremely timely in responding. They helped each other often, and he was always quick to assist. He has experienced a great deal of stress in the current work environment, and it has been difficult, but he has handled it well.

Mr. Diebold tried to find a position for Mr. Butterfield in Pinellas Park to keep him in the area, but he does not have anything open that matches Mr. Butterfield’s skillset. He is one of the nice leaders, and you will not hear negative things about him from those who work with him.

Mr. Diebold would hire Mr. Butterfield in a second. He has the skills to be a good manager and is not afraid to ask for help.

Reference Notes
Andrew “Andy” Butterfield

Words or phrases used to describe Andy Butterfield:

- Very personable,
- Humble,
- Leader,
- Timely,
- Responsible, and
- Accountable – he will not give you excuses.

Strengths: Really good with people, leadership, very nice, leads by example and people follow.

Weaknesses: Strengths are often weaknesses, and he is so relatable that it can be a weakness at times. He is attached to the staff and takes it to heart.

**Mary Jo Disharoon – Administrative Officer, Joint Base McGuire-Dix-Lakehurst,
Trenton, NJ 732-278-6626**

Ms. Disharoon worked with Mr. Butterfield from 2009 to 2012. Mr. Butterfield had the most challenging job of any officer who worked on the Base, because it was a newly established Base and he was the first commanding officer. He was outstanding and worked diligently, often seven days a week, to set up the Base correctly. He was just phenomenal.

While Mr. Butterfield had input on hiring for higher level positions, the HR department did most of the hiring. He had a knack for being a strong leader, while also being fair to employees and enjoyable to work with. He had a nice warm personality; everyone adored and respected him.

The Historical Society was far reaching in the community. Mr. Butterfield invited representatives to the Base. He gave them the title of honorary commanders and helped them understand its operations. He was great at community outreach.

While Mr. Butterfield was the leader and in charge, he was also a people person. Everyone felt comfortable going to him with concerns. His door was always open. He was very honest and always upfront. He said hard things that people did not want to hear and did so gracefully. He always showed integrity. He is an all-around great person and a wonderful leader.

While the Base was planned for a few years before it was built, many issues were not known until they actually started working there. Mr. Butterfield’s job was very challenging, and he had to work through the issues. He led the teams and overcame the challenges. He never let anyone down and always followed through on what he said he would do.

Reference Notes

Andrew “Andy” Butterfield

The Air Force was the leading organization on the Base. As such, the naval officers did not always receive the equipment and resources that they requested, and often received pushback on their requests. The staff turned to Mr. Butterfield when this occurred, and he spoke to the right people to explain why the purchases were necessary. The purchases were then approved, which was very helpful to the naval officers. When he left, he was given the highest-level award possible. This award is only given to the cream of the crop.

Mr. Butterfield put in his retirement request from the military, and it was approved. The Base was created, and they needed a Navy Captain to help lead it. The Navy cancelled Mr. Butterfield’s retirement request even though it was already approved. Based on his performance and attitude, you never would have known that it was not his choice to lead the Base. He was never disgruntled like many would have been and served so honorably. He is very remarkable.

Ms. Disharoon cannot imagine Mr. Butterfield being involved in controversy. Anyone who has worked with Mr. Butterfield, both civilian and military personnel, has a positive opinion of him.

Ms. Disharoon would not hesitate to hire Mr. Butterfield. He would be a great manager because leadership is one of his greatest skills. You cannot find a better candidate in every regard. He is the best person that she has worked with.

Words or phrases used to describe Andy Butterfield:

- Outstanding leader,
- Utmost integrity,
- Had the biggest impact of all the leadership,
- Made employees feel part of the team, and
- Valued the input of others.

Strengths: Leadership, integrity, people person, set expectations but was always fair.

Weaknesses: None identified.

Lisa Robinson – Resident, St. Pete Beach, FL 727-631-7080

Ms. Robinson has known Mr. Butterfield since 2018. Ms. Robinson lives on a corner with a four-way stop that is also at a bend in the road. Because of the terrain, one of the stop signs is pushed far back, so the road does not appear to be a four way stop. City employees cut down her trees and cut back her hedge to make the sign more visible, even though she was well within her planting rights. Mr. Butterfield was asked to smooth it over.

Mr. Butterfield was very apologetic and asked what he could do to make up for the damage, knowing that it was impossible to replace 20-year-old trees. However, he addressed some other

Reference Notes
Andrew “Andy” Butterfield

issues and listened to her concerns about the street. She moved into the home in 1993 and has tried to address her concerns with the City since. One example is that drivers often ignore the stop signs because it is a residential area. She shared some documents from back in the day and he tried to assist her efforts. Unfortunately, they were not able to achieve the desired result, but the City is redoing the street which should help. Mr. Butterfield was wonderful to work with and was instrumental in the process. She thinks very highly of him.

Mr. Butterfield sees the big picture and is always willing to listen which are crucial components to making good decisions. He understands exactly where change is needed and what improvements could be made. He is very good at follow up and he keeps others informed.

Ms. Robinson is not aware of any controversy that involves Mr. Butterfield. He is very levelheaded, intelligent, and reasonable. While they have not worked together on a day-to-day basis, she is not aware of anyone who has a negative opinion of him.

Ms. Robinson thinks very highly of Mr. Butterfield, he was very helpful. They will be sad if he leaves. She would love him to be the manager for St. Pete Beach and he will be an asset for any community that hires him.

Words or phrases used to describe Andy Butterfield:

- Smart,
- Goal oriented,
- Follows up,
- Community minded,
- Reasonable, and
- Good manager.

Strengths: Very personable, service oriented, community minded, gets the big picture, extremely reasonable, logical, very qualified and underutilized in St. Pete Beach.

Weaknesses: None identified.

Prepared by: Lynelle Klein
Colin Baenziger & Associates

CB&A Internet Research

Internet – Newspaper Archives Searches Andrew A. Butterfield (Articles are in reverse chronological order)

<https://pinellas.gov/pinellas-partners-in-recycling-contamination-work-group-charter/>
Between 2019 and present day

Pinellas Partners in Recycling – Contamination Work Group Charter

Purpose

Work Groups are established to support and advance the objectives of Pinellas Partners in Recycling (PPR) in accordance with its Policies and Procedures.

The purpose of the Contamination Work Group is to:

- Develop resources for consistent and effective public messaging, based on research and processing availability, for materials acceptable and not acceptable in single stream recycling and garbage collection programs to achieve measurable outcomes; and
- Provide resources to solid waste and recycling department representatives of local and regional governments

Scope

The Work Group elected to focus on a single contaminant at a time by creating a targeted marketing campaign aimed at keeping the specific contaminant out of single stream recycling and garbage collection. The Work Group is currently focusing on lithium-ion batteries. A lithium-ion (or Li-ion) battery is a type of rechargeable battery that is commonly used for portable electronics. Li-ion batteries should not be placed in single stream recycling collection containers because they are a fire hazard and are not successfully recycled through the single stream recycling process. These batteries should also not be placed in garbage collection containers because they can explode when compressed and cause fires, which is dangerous to solid waste workers.

The campaign will educate and advise residents how to properly recycle or dispose of rechargeable batteries. The Work Group developed a pre-survey to find out what residents currently know about Li-ion batteries and how they recycle or dispose of them. Based on the survey results, the Work Group will research and use effective marketing techniques to develop collateral and a communications plan that includes success measures.

Resources

The group maintains the following resources:

- Pre-survey results (completed)
- Campaign collateral (in process)
- Communication plan (to be developed)
- Meeting agendas and notes (ongoing)

Responsibilities of Officers

The Officers are Chair and Secretary. Their responsibilities are:

Internet – Newspaper Archives Searches Andrew A. Butterfield (Articles are in reverse chronological order)

- Chair: guides conduct of meetings, builds unity of purpose, helps prepare agendas, welcomes new members, and introduces guests, knows and understands the group's purpose, ensures sufficient consideration of issues, tries to promote consensus, prevents anyone from dominating discussions, progresses through the agenda on time, summarizes problems, points, and decisions, ensures decisions are carried out, delegates tasks, and represents the group to PPR.
- Secretary: prepares agendas, arranges meetings, keeps formal records of the group's process and decisions, ensures that resources are accessible to group and PPR, ensures that members have access to records, and assists in representing the group to PPR.

Responsibilities of Members

- Attend and participate in Work Group meetings. If members cannot attend a meeting, they will notify the Secretary and send an alternate, if possible.
- Review and provide input on the development of resources.

Members & Organizations

Officers and members include representatives from the solid waste and recycling departments of local and regional governments, and private sector recycling collector and processors. They are listed in alphabetical order by last name:

Andrew Butterfield, City of St. Pete Beach

Duration

The group meets every two months or more, as needed

Reporting

The Work Group reports its activity to PPR, who reports the Work Group's activity to the Pinellas County Solid Waste Technical Management Committee.

Internet – Newspaper Archives Searches
Andrew A. Butterfield
(Articles are in reverse chronological order)

The Gabber (FL)
March 22, 2022

Grab a Basket, Clean St. Pete Beach

Author: Gabby Reeder

Happy Spring! March 20 introduced the first day of Spring and what famous tradition takes place in Spring? You got it. Spring Cleaning. The City of St. Pete Beach wants to remind its citizens of its Beach Baskets.

What are the green Beach Baskets lining the entrances of St. Pete Beach? Implemented in January 2021, The Beach Baskets serve as a facet of the “Vision 2030” plan for the City, according to St. Pete Beach Public Information Officer, Sarah Laracuate.

The mission statement of the ‘Vision 2030’ plan states, “The City of St. Pete Beach is committed to ensuring an optimal quality of life for its community by protecting our beaches and family-friendly environment while being respectful of our history.”

To optimize the protection and maintenance of the beaches, the Beach Baskets allow beach-goers and community members to pick up trash every day, not just during scheduled beach clean-ups. “The inspiration came about during staff brainstorming, and was installed by **Andrew Butterfield** from our Public Works team,” Laracuate said.

Laracuate mentioned users can virtually log how much trash they pick up, by scanning a QR code. She told the Gabber in the past six months, citizens logged 35 baskets of trash.

Internet – Newspaper Archives Searches
Andrew A. Butterfield
(Articles are in reverse chronological order)

Tampa Bay Times (FL)
March 11, 2018

NEWCOMERS DECLARE PLANS TO CHALLENGE CRIST

Author: Adam Smith

When you're an obscure, underdog political candidate, the traditional ritual is to introduce yourself as having stellar qualifications, natural political instincts and great potential to raise money. That's how you sell your viability and attract supporters when, alas, impeccable credentials and motivations are rarely sufficient to win an election.

So the Buzz asked **Andy Butterfield**, an affable, retired 25-year Navy officer planning to challenge Democratic U.S. Rep. Charlie Crist, what makes him a strong choice for Congress. "I hate talking about me," said the St. Pete Beach resident, who worked at MacDill Air Force Base.

Can he raise money to be take on the universally known former governor, who already has \$1.7 million in his campaign account? "When I do a charity event, asking my friends and family to donate money is hard for me," said **Butterfield**, 54. "Maybe I can do it another way, like knocking on every radio station's door and saying, 'Hey will you interview me?'"

St. Petersburg resident George Buck, 62, has a similarly impressive resume - member of the U.S. Army's 101st Airborne Division, professional firefighter, consultant and expert on terrorism and emergency management - and also no political or campaign experience. "Being a fireman and a soldier, I'm a boots on the ground person ... One of the things I can ask voters is, 'What has Charlie done for you?' Do we want to keep putting up recycled politicians to run? ... Everybody keeps telling me Charlie's a money-making machine - but so was Hillary." Buck said he decided the run on Dec. 9, after attending an American Legion meeting where, he said, Crist stayed for about 10 minutes of photos and then Veterans Affairs officials were unable to answer the questions of veterans in attendance.

Butterfield was deputy chief of staff at the U.S. Special Operations Command at MacDill from 2007-09. From 2009 until he retired in 2012, he was a commanding officer at Joint Base McGuire-Dix-Lakehurst in New Jersey. His decision to run came after Crist voted against the Republicans' tax reform package in December. "How could you be a thinking person and care about people and not want to reform the tax code and provide tax relief to the vast majority of Americans?" he said. "I should stop waiting for someone else to run."

Congressional District 13 covers central and southern Pinellas, and leans Democratic but not overwhelmingly so. Hillary Clinton beat Donald Trump in the district by nearly 4 percentage points, though lost the county overall by about 1 percent. Former U.S. Rep. David Jolly lost to Crist in 2016. Asked to grade Trump's performance as president, Buck and **Butterfield** each gave him a B-plus. Both said they strongly support repealing the Affordable Care Act and expanding offshore drilling in the Gulf of Mexico, as long as rigs won't be visible from Pinellas beaches and they're convinced it will be safe.

Internet – Newspaper Archives Searches
Andrew A. Butterfield
(Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **Andrew A. Butterfield** is listed below.]

<https://stpetemaddogstriathlonclub.wildapricot.org/resources/Newsletters/July%202017%20Finish%20Line%20Newsletter.pdf>

St. Pete Mad Dogs Triathlon Club

July 2017

Volume 23 Issue 7

WELCOME NEW MAD DOGS!

#3709 - **Andy Butterfield** - St. Pete Beach

**Internet – Newspaper Archives Searches
Andrew A. Butterfield
(Articles are in reverse chronological order)**

Joint Base McGuire-Dix-Lakehurst Public Affairs
June 28, 2012

First JB MDL Navy deputy retires, new deputy welcomed

Author: Bill Addison

JOINT BASE MCGUIRE-DIX-LAKEHURST, N.J. – Naval Support Activity Lakehurst Commander and Joint Base McGuire-Dix-Lakehurst Deputy Commander Navy Capt. **Andrew Butterfield** relinquished command to Navy Capt. William Bulis June 21 here.

The change of command ceremony took place inside the Westfield Hangar, the home of the N.J. Army National Guard's 1/150th Helicopter Assault Battalion. Participants and attendees were flanked by UH-60 Blackhawk Helicopters which served as a fitting tribute to the outgoing commander who spent much of his naval career flying the U.S. Navy's version of the aircraft.

To highlight **Butterfield's** career and dedication to those he served with, Col. John Wood, JB MDL commander, told a story about **Butterfield** as a young lieutenant junior grade helicopter pilot stationed on the USS John F. Kennedy in 1988, when he was called to respond to a fire aboard the submarine USS Bonefish. "There were 92 lives at stake that day," said Wood. "His crew goes out and, as they were searching for survivors to save their lives 150 miles off the coast, he sees them first."

Butterfield's aircraft was one of six helicopters involved in the three-hour rescue. "He saved 19 lives that day," said Wood. "He had the opportunity to save a life that day and he's done everything he can to train and make sure Sailors are ready to do the same."

Wood commended **Butterfield** for his dedication to service members during his career as well as his tenure at JB MDL while welcoming Bulis to the command. "If you look back at the beginning and where he came from, it's an honor to stand on this stage with (Navy) Captain **Butterfield** and it will be an honor to serve with (Navy) Captain Bulis," he said.

Butterfield, who is retiring from active duty after 27 years of service, said he stayed in the Navy much longer than he initially intended. "I stayed because of the people and the caliber of people who I worked with," said **Butterfield**. "We've worked together, lived together, breathed together we've enjoyed some laughs together - it's a special bond," he said.

As one of his final acts as a commissioned officer, **Butterfield** presided over the re-enlistment of Petty Officer 2nd Class Michael Rodriguez.

Butterfield served as the first commander of NSA Lakehurst since the stand-up of the joint base in October 2009. He was the 50th naval commander of the area once known as Navy Lakehurst. In this roll, **Butterfield** served first as deputy commander for the 87th Mission Support Group, and more recently as deputy commander of JB MDL.

Internet – Newspaper Archives Searches
Andrew A. Butterfield
(Articles are in reverse chronological order)

Bulis thanked the Sailors and civilians of NSA Lakehurst for welcoming him and his family to the joint base. "You guys have spent three years knocking the rough edges of this joint-basing process into a fine machine," he said "It is my honor to serve you as [commanding officer] as we go through this and again make it an even better machine."

A native of Long Island, N.Y., Bulis was commissioned in May 1990, upon graduation from the U.S. Naval Academy with a B.S. in Mechanical Engineering. He was designated a Naval Aviator in September, 1993.

Prior to his assignment here, Bulis served aboard the USS. Harry S. Truman as "Air Boss." In that role, he completed a successful combat deployment supporting Operations ENDURING FREEDOM and NEW DAWN, as well as overseeing the Truman's 15-month overhaul in Norfolk Naval Ship Yard in Virginia.

Internet – Newspaper Archives Searches
Andrew A. Butterfield
(Articles are in reverse chronological order)

Burlington County Times (Willingboro, NJ)
May 16, 2012

Base air show drew big crowds, enthusiasm over weekend

Author/Byline: Mark Zimmaro

JOINT BASE MCGUIRE-DIX-LAKEHURST - About 200,000 people took advantage of a rare opportunity to go beyond the gates of the military base last weekend and enjoy a dynamic display of aviation power. The two-day Open House and Air Show attracted visitors from the tri-state area as well as travelers from abroad as U.S. military personnel demonstrated power-projection capabilities by giving the public a rare inside look at operations.

"Much like our joint base, this air show featured all five services' important contributions to our country's current missions," said Col. John Wood, the 87th Air Base Wing commander. "We were more than happy to host this event."

The base opened its gates for 10 hours both days, giving visitors plenty of time to check out static aircraft displays from different eras, chat with crew members, and walk through the planes that run the day-to-day operations, such as C-17s, KC-10s and KC-135s. Four hours of performances each day featured all the military branches. Acts included the Army Golden Knights parachute team, the Navy F/A-18 Super Hornet demonstration, and the Marines air ground task force demonstration.

"I'm thrilled the Navy could be highlighted during this weekend's performances," said Capt. **Andrew Butterfield**, the base's deputy commander. "I'm proud of my sailors for showing the attendees what the Navy is all about."

Both days were headlined by the world-famous U.S. Air Force F-16 Thunderbirds, which could be heard screeching across the sunny blue skies. The long list of performers and activities drew a massive crowd, requiring hundreds of volunteers to be on their toes.

"This was a large undertaking, requiring a huge amount of coordination and planning with both internal and civilian elements," Wood said. "We definitely learned a few things during the process, and we hope the next Open House and Air Show we put on will be even more of a resounding success."

**Internet – Newspaper Archives Searches
Andrew A. Butterfield
(Articles are in reverse chronological order)**

Joint Base McGuire-Dix-Lakehurst Public Affairs
March 30, 2012

Lakehurst hosts homecoming for deployed Sailors

Author: Tom Worsdale

JOINT BASE MCGUIRE-DIX-LAKEHURST, N.J. – Joint Base McGuire-Dix-Lakehurst leadership hosted a Homecoming Celebration Ceremony March 28 here in honor of the Sailors stationed at Lakehurst who returned from deployment during the past year.

Returning Sailors were honored in a service presided over by Navy Capt. **Andrew Butterfield**, JB MDL deputy commander. The Sailors returned from Iraq, Afghanistan, Cuba, Kuwait and Bahrain.

Butterfield and Command Master Chief Herbert Kelton, presented all returnees with Certificates of Appreciation for their service and efforts during their overseas deployments. "It is my distinct pleasure to honor these outstanding Sailors for the service they have given to our country," said **Butterfield**. "I would also like to thank all those here today who support these Sailors as well as those who have served the military. Your efforts make it possible for our Sailors to better perform their duties knowing that the home front is taken care of.

Butterfield added, "We also pray for the safe deployment and return of those still serving in harms-way around the globe."

The event was attended by base employees, Sailors, family members and members from the Lakehurst Veterans of Foreign Wars, the Fleet Reserve Association, the Elks Clubs of Toms River as well as members from the Point Pleasant and the Navy Lakehurst Historical Society.

Internet – Newspaper Archives Searches
Andrew A. Butterfield
(Articles are in reverse chronological order)

Joint Base McGuire-Dix-Lakehurst Public Affairs
February 3, 2012

Anchors away: NSA-Lakehurst receives 'Golden Anchor'

Author: Darren Grant

JOINT BASE MCGUIRE-DIX-LAKEHURST, N.J. – Commander Navy Installations Command awarded Naval Support Activity-Lakehurst the coveted 2011 Retention Excellence Award Jan. 17 here.

The CNIC Retention Excellence Award, known as the "Golden Anchor," is awarded to Navy shore installations achieving the goals set forth by the Chief of Naval Operations. At a time when the Navy is "reshaping," the standards for retaining the most promising Sailors remain the same.

The requirements for the annual award are met by earning two or more honor-roll awards during the fiscal year and achieving a passing grade of 85 percent or better. All 85 qualifying installations' career development programs were graded on Perform to Serve applications, Career Development Board compliance and other career enhancing factors. Career Development Boards are a unique tool Navy leaders use to ensure Sailors are aware of special programs, policy changes and methods to attain personal and professional goals. "The credit for this award goes to the Sailors who reenlist and make a choice to commit their lives to excellence," said Command Master Chief Herbert Kelton NSA-Lakehurst.

To qualify for the award, NSA-Lakehurst needed to retain a percentage of Sailors in three zones, which are used to identify Sailors based on the number of years of service. The annual reenlistment rate benchmarks were 59 percent for Zone A (zero to six years in service), 66 percent for Zone B (six to 10 years in service) and 72 percent for Zone C (10 to 14 years of service). The decline rate for Zone A must be equal to or less than 5.5 percent as well.

"This award is a result of the command career development team whose hard work and dedication continues to put Sailors first," said Navy Capt. **Andrew Butterfield**, NSA-Lakehurst Commanding Officer and Joint Base McGuire-Dix-Lakehurst deputy commander.

Internet – Newspaper Archives Searches
Andrew A. Butterfield
(Articles are in reverse chronological order)

American Forces Press Service
July 28, 2011

New Jersey base realizes joint benefits

Author: Donna Miles

JOINT BASE MCGUIRE-DIX-LAKEHURST, N.J., July 15, 2011 -- With two months left for the Defense Department to comply with the 2005 base realignment and closure plan, a related initiative -- joint basing -- already is paying off through closer interservice collaboration and the promise of future cost savings, officials here reported.

Joint Base McGuire-Dix-Lakehurst was part of the first phase of the plan that consolidated 26 military installations around the country into 12 joint bases. The concept was designed to generate efficiencies, reduce redundancy, and ultimately, save taxpayer dollars. "I think this joint base initiative is great," said Col. Joseph Poth, the deputy commander here who helped to plan and execute the merger. "The logic is, if we can train together, if we can fight together, why can't we run a base together?"

Joint basing brought big changes here when three installations -- McGuire Air Force Base, Fort Dix and Naval Air Engineering Station Lakehurst -- merged on Oct. 1, 2009, to become the Defense Department's only tri-service base.

It was part of the first wave of joint-base consolidations. Also during Phase 1, Naval Amphibious Base Little Creek and Fort Story in Virginia merged to form Joint Expeditionary Base Little Creek. Fort Myer and the Marine Corps' Henderson Hall in Virginia formed Joint Base Myer. Andrews Air Force Base, Md., and Naval Air Facility Washington, D.C., became Joint Base Andrews. And thousands of miles away in the Pacific, Navy Base Guam and Andersen Air Force Base formed Joint Region Marianas.

As McGuire, Dix and Lakehurst formed one giant base that stretches 20 miles east to west and encompasses 60 square miles of southern New Jersey flatlands and forests, each retained its operational identity and mission, Poth explained.

The Air Force, the lead service here, continues to provide global mobility and expeditionary combat support with its C-17 Globemaster III, KC-10 Extender and KC-135 Stratotanker aircraft. The Army conducts Soldier training and pre- and post-mobilization activities. The Navy designs and tests aircraft carrier catapult and arresting gear and other naval air support equipment.

Joint basing offers the three services the opportunity to share some of the costs of supporting these operations, said Air Force Col. John Wood, who took command of the joint base June 24, 2011. In his new role, Wood has command and control of the 87th Air Base Wing and support responsibility for more than 80 tenant organizations referred to here as "mission partners." Arriving at Joint Base McGuire-Dix-Lakehurst, Wood was no stranger to joint basing. He helped

Internet – Newspaper Archives Searches
Andrew A. Butterfield
(Articles are in reverse chronological order)

Charleston Air Force Base and Naval Weapons Station Charleston merge to form Joint Base Charleston, S.C., as part of the second wave of joint-basing consolidations.

Other installations included in the Phase 2 mergers were the Navy's Anacostia Annex and Bolling Air Force Base in Washington, which formed Joint Base Anacostia-Bolling. Naval Station Pearl Harbor and Hickam Air Force Base in Hawaii became Joint Base Pearl Harbor-Hickam. Elmendorf Air Force Base and Fort Richardson in Alaska formed Joint Base Elmendorf-Richardson. Lackland Air Force Base, Randolph Air Force Base and Fort Sam Houston, Texas, formed Joint Base San Antonio. Langley Air Force Base and Fort Eustis in Virginia became Joint Base Langley-Eustis. Wood said watching how Joint Base McGuire-Dix-Lakehurst and other first-phase installations handled the transition helped smooth the way at Charleston. Now, as commander of the tri-service base in New Jersey, he said he plans to continue fine-tuning the process by emphasizing teamwork, communication and inclusion.

To help in promoting these principles in his command structure, Wood recently welcomed Navy Capt. **Andrew Butterfield** as a second deputy commander to provide a Navy perspective to his command team. Operating with two deputies in his organizational structure -- one Army and one Navy -- is a new concept, Wood acknowledged. "It's different than the doctrine I have grown up with, but it has a lot of advantages and potential," he said.

Much of the potential of joint basing will come in savings on contracts for services such ground maintenance and snow removal, Wood said. In addition, the joint base's contracting workforce can operate more efficiently -- and presumably, more cost-effectively -- by awarding and managing a single contract for each service, rather than three. "As we combine things, it is common sense to assume that we are going to have savings here, so we will continue down that path," Poth said. Wood said he is looking forward to seeing those cost savings, but that he knows they won't be realized fully until contracts already in place expire and can be renegotiated. Meanwhile, he added, he plans to continue looking across the joint base structure to identify other ways to streamline operations and make them more efficient.

Wood and his leadership team say they are already seeing some of the other benefits of joint basing. The gates that once divided the installations are gone, enabling Airmen, Soldiers, Sailors -- as well as Marines and Coast Guard members who have activities here -- to move freely around the joint base.

As they do so, they interact regularly, sharing everything from training facilities to housing, dining halls and morale, welfare and recreation activities. Air Force Brig. Gen. William Bender, commander of the Air Force Expeditionary Center here, said that pays off in mission readiness. "One of those benefits is the ability to rapidly and effectively integrate into joint environments when we deploy or when we are assigned to support missions both stateside and abroad," he said. "Because we have the benefit of living and working in an integrated environment, we naturally 'learn the language' of our service counterparts and we learn what the other services bring to the fight, wherever that fight may be."

Internet – Newspaper Archives Searches
Andrew A. Butterfield
(Articles are in reverse chronological order)

But getting to that point wasn't without its challenges, Poth conceded. He remembered the angst some experienced during the transition and the town hall meetings the leadership regularly held to allay fears and clear up misconceptions. To Poth's surprise, some of the workers who took the merger the hardest were long-time Army and Navy civilian employees with strong loyalties to their services.

Installation leaders, led at the time by Air Force Brig. Gen. Gina Grosso, the first joint base commander, planned an elaborate and all-inclusive ceremony to officially stand up the joint base. Members of Congress, local mayors and current and past commanders from the three installations participated as a joint color guard marched, a tri-service team sang the national anthem and a band played a medley of the military service songs.

"As we mark this day, we want to welcome the newest members of our joint base team," Poth said during the ceremony, recognizing the role the different services contribute to national defense with their active and reserve components and civilian workforces. "Today is a day long in coming," Poth said. "Together, we all join forces to become America's premier joint war fighting base, capable of projecting air, land or sea power worldwide."

Civilian employees from Fort Dix and Lakehurst formed up on the flight line, where each was inducted into the Department of the Air Force and presented an Air Force pin. After the ceremony, they returned to their work stations to find a letter from Grosso, personally welcoming them to the Air Force and the joint team.

Looking back over the consolidation during a Defense Department joint basing program management review conference in February, Grosso discussed the challenges of integrating support structures, but also the benefits of bringing the separate military cultures together at Joint Base McGuire-Dix-Lakehurst. "You cannot calculate the takeaway from your military members living together and training together," she said during the forum in Washington. "It's a benefit you just can't quantify."

**Internet – Newspaper Archives Searches
Andrew A. Butterfield
(Articles are in reverse chronological order)**

[CB&A Note: Only the information relevant to **Andrew A. Butterfield** is listed below.]

<https://www.congress.gov/nomination/103rd-congress/1785?s=1&r=58>

PN1785 — Navy
103rd Congress (1993-1994)

Nominees

There are 1,657 nominations, beginning with THOR DAVIS AAKRE, and ending with ALLAN KAY ZWEIFEL

Organization
Navy

Latest Action
09/28/1994 - Confirmed by the Senate by Voice Vote.

Date Received from President
09/19/1994

Committee
Senate Armed Services

Nominees: PN1785 — 103rd Congress (1993-1994)

THE FOLLOWING-NAMED LIEUTENANTS IN THE LINE OF THE NAVY FOR
PROMOTION TO THE PERMANENT GRADE OF LIEUTENANT COMMANDER,
PURSUANT TO TITLE 10, UNITED STATES CODE, SECTION 624, SUBJECT TO
QUALIFICATIONS THEREFORE AS PROVIDED BY LAW:

To be LIEUTENANT COMMANDER

Nominee
ANDREW ALDEN BUTTERFIELD

Division
UNRESTRICTED LINE OFFICERS

**Internet – Newspaper Archives Searches
Andrew A. Butterfield
(Articles are in reverse chronological order)**

[CB&A Note: Only the information relevant to **Andrew A. Butterfield** is listed below.]

<https://www.congress.gov/nomination/99th-congress/60?q=%7B%22search%22%3A%5B%22Ryan+White%22%5D%7D&r=5716>

PN60 — Civilian
99th Congress (1985-1986)

Nominees: PN60 — 99th Congress (1985-1986)

THE FOLLOWING NAMED NAVAL ACADEMY MIDSHIPMEN TO BE APPOINTED
PERMANENT ENSIGN IN THE LINE OR STAFF CORPS OF THE U. S. NAVY,
PURSUANT TO TITLE 10, UNITED STATES CODE, SECTION 531:

To be ENSIGN; PERMANENT

Nominee	Division
ANDREW ALDEN BUTTERFIELD	NAVAL ACADEMY MIDSHIPMEN

Research Compiled by: Christopher Nestman
Colin Baenziger & Associates



Section 5

Kathleen A. Gunn

Fernandina Beach

City Manager Candidate Report

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Cover Letter and Resume

**KATHLEEN GUNN
910 BAY DRIVE #26
MIAMI BEACH, FL 33141
718-753-5357 Kgunn96@gmail.com**

July 7, 2023

To Whom It May Concern:

Please accept this letter as an expression of interest in the City Manager of Fernandina Beach position. As this cover letter and attached resume detail, I am a proven and experienced municipal executive with 20+ years of leading, managing and serving cities with populations from 50,000 to 175,000 in the states of Florida and New York.

My strengths lie in shaping and executing a city's vision through strategic planning and implementation, completing capital improvement projects on time and on budget, teambuilding, and effective project management. Throughout my career I have successfully steered cities to find their niche, leverage their unique character and attract investors, while working to facilitate the expansion of existing businesses.

I am a servant leader who cares deeply about my work, my colleagues, and those I serve. I step up under the most challenging of circumstances and lead through crises. I am reliable, transparent, and ethical in my approach to the elected body, staff, and the public. I am a direct and honest communicator who models ethics and integrity in my personal and professional interactions.

Nothing makes me happier than facilitating the success of my team and the cities I serve. While I was Tamarac City Manager, the City won the International Public Management Association for Human Resources Small Agency Award for Excellence, Cigna Culture of Well-Being Award, Center for Digital Government Digital Cities Award, Government Finance Officers Award, and the ICMA Certificate of Excellence in Performance Management. It is a distinct privilege to serve the public as a city manager and it is one that I do not take for granted.

I am a strategist and an innovator. I regularly reach consensus on issues of mutual concern, and I thrive in collaborative environments. A city manager is the chief architect and cheerleader-in-residence for turning a community's dreams into reality. Creating the environment for participation from both internal and external stakeholders and getting buy-in from them is foundational to consistently evolving a community's vision. This is where I excel. Without buy-in, the most brilliant ideas may never be executed.

I welcome the opportunity to put my energy, intellect, talent, and experience at the service of the city of San Fernandina to sustain and cultivate the prosperity the community enjoys. Thank you in advance for your consideration of my application. I welcome the opportunity to speak with you in person to further detail my qualifications for the position.

Sincerely,

Kathleen Gunn

KATHLEEN GUNN
910 Bay Drive #26
Miami Beach, FL 33141
718-753-5357 kgunn96@ gmail.com

PROFILE

Results-driven city manager with **two decades** of success in crafting and executing policy in cities in Florida and New York. Engaged and enthusiastic servant leader, skilled in team building, organization and employee development, and project management. Urban Strategist who excels at collaboration on complex projects with diverse groups to reach consensus, ensuring equity and inclusiveness.

CAREER HIGHLIGHTS

- Lead economic development teams in three south Florida cities attracting more than \$150 million in capital investment and creating more than 950 jobs.
- Oversaw Fort Lauderdale Waterworks 2011, a \$500 million water and sewer capital improvement project, that was completed on time and within budget.
- Co-wrote and implemented the White Plains economic development plan which resulted in \$600 million in private investment.

PROFESSIONAL EXPERIENCE

CITY OF TAMARAC, Tamarac, FL - a majority minority community located in west central Broward County in southeast Florida with a population of 72,000, \$242 million budget and more than 400 employees. The City of Tamarac has a bond rating of AA.

City Manager (September 2021 – March 2023)

- Chief Executive Officer of a high-performance organization empowering and cultivating employee leaders by aligning values, strategy, culture and budget.
- Reduced millage rate for two consecutive years while staying within budget
- Secured nearly \$2.5 million in new grant funding
- Oversaw economic development efforts -5 of the largest commercial real estate transactions in Broward County including a brand-new business model Amazon facility
- Completed Inspiration Way – A *museum without walls* public art installation
- Invested in comprehensive technology; SMART city infrastructure, fiber optics, cloud computing, and cybersecurity
- Won International Public Management Association for Human Resources Small Agency Award for Excellence, Cigna Culture of Well-Being Award, Center for Digital Government Digital Cities Award, Government Finance Officers Award, and ICMA Certificate of Excellence in Performance Management
- Implemented police community engagement efforts that reduced crime by 20% in 2021
- Administered \$10 Million in COVID related funding
- Maintained ranking as one of 85 Accredited and ISO Class 1 rated Fire Departments
- Increased revenue by 100% within 1st seven months of the fiscal year at city's golf course

Assistant City Manager (September 2017 – August 2021)

- Secured more than \$800,000 in new grant funding
- Architect and decision maker in the City's Strategic Plan, operating budget, capital improvement plan, emergency management, and major development projects.
- Oversaw **Information Technology, City Clerk, Building Department, Public Information, Economic Development, Parks and Recreation.**
- Co-created and directed messaging and branding across all media platforms.
- Conceived and lead economic development and redevelopment strategies.
- Developed and implemented equity initiatives in a minority majority community.

CITY OF MIRAMAR, Miramar, FL - a majority minority community located in southwest Broward County in southeast Florida with a population of 140,000, \$250 million budget and 1,000 employees.

Assistant City Manager (November 2014 – August 2017)

- Reorganized the Cultural Affairs department; reduced costs by \$1 Million per year
- Secured more than \$350,000 in new grant funding for various City departments.
- Oversaw **Community and Economic Development, Parks and Recreation, Social Services and Cultural Affairs departments.**
- Spearheaded the Business First corporate outreach to cultivate small business development and the aviation industry.

CATHOLIC EXTENSION, NY, NY (May 2012 – November 2014)

Northeast Director of Development

- Exceeded major gifts fundraising goal for 2013 by 20%

CITY OF FORT LAUDERDALE, Fort Lauderdale, FL – county seat and largest city in Broward County with a population of 180,000, \$600 million budget and 2,600 employees.

Assistant City Manager (2004 –2009, 2011)

- Key Advisor, Decision Maker and Architect of executive team
 - Negotiated historic pension reform saving the City in excess of \$100 million.
 - Eliminated \$21 million insurance deficit in less than 5 years.
- Oversaw **Planning and Zoning, Community Development, Economic Development, Parks and Recreation, Grants and Legislative Affairs, Public Works departments and the Community Redevelopment Agency.**
- Leveraged \$13 million in community redevelopment funds resulting in \$358 million in private investments in the city's impoverished areas.
- Completed more than \$100 million in capital projects
- Directed and implemented development guidelines and master plans in the downtown, at the beach, and along the New River to ensure the right development in the right place.

Section 5

- Assisted in growing the City's fund balance from \$875,000 to \$78 million over five years.
- Developed a customized grants management system for \$26M in grants.

Assistant to the City Manager (2009-2011)

- Developed and implemented a strategy for \$8 million in federal stimulus dollars.
- Realized more than \$300,000 in ad valorem taxes through annexation.

WHITE PLAINS BUSINESS IMPROVEMENT DISTRICT (BID), NY (2002 –2004)

Executive Director

- Managed programs and services downtown to retain and attract businesses.

CITY OF WHITE PLAINS, NY, Office of the Mayor (1999 –2002)

Policy Specialist

- Planned and executed economic development projects.

PROFESSIONAL ORGANIZATION MEMBERSHIPS

- Broward County City Managers Association, Vice President 2018-2021
- Florida City County Managers Association, Member
- International City Managers Association, Member
- Urban Land Institute, Member

EDUCATION

Masters of Public Administration, (MPA), Bachelor of Arts (B.A.) in Political Science,
MAGNA CUM LAUDE ***Pace University***

Masters of Pastoral Ministry, SUMMA CUM LAUDE

Certificate in Spiritual Direction ***St. Thomas University***

Inner MBA Certificate – 9 month-long mindful leadership program

New York University Mindful Center

AWARDS

Broward County City Manager's Association – ***Excellence in Leadership***, 2022

Contextually Engaged Theological Education Foundation, ***Mercedes Iannone***

Legacy, 2023

Candidate Introduction

KATHLEEN GUNN

EDUCATION

Masters of Public Administration, Bachelor of Arts in Political Science, Pace University
Masters of Pastoral Ministry, Certificate in Spiritual Direction, St. Thomas University
Inner MBA Certificate – 9 month-long mindful leadership program, NYU Mindful Center

EXPERIENCE

Luminance, Founder/CEO - Management Consultant	2023 – present
City Manager, Tamarac, FL	2021 – 2023
Assistant City Manager, Tamarac, FL	2017 – 2021
Assistant City Manager, Miramar, FL	2014 – 2017
Northeast Director of Development, Catholic Extension	2012 – 2014
Assistant City Manager, City of Fort Lauderdale	2004 – 2009, 2011
Assistant to the City Manager, City of Fort Lauderdale	2009 – 2011
Executive Director, White Plains Business Improvement District	2002 – 2004
Policy Specialist, City of White Plains	1999 – 2002

BACKGROUND

As City Manager of Tamarac, I was responsible for day-to-day operations of a full-service municipality. Tamarac is a majority minority community of more than 72,000 residents located in the heart of west-central Broward County due west of Fort Lauderdale. In FY 2023, the total budget was \$242 Million with a \$14.1 Million Capital Improvement Program. The City had 443 employees and a bond rating of AA. In the latest community surveys, residents and businesses reported satisfaction rates of 73% and 78% respectively, exceeding state and national averages.

During my City Manager tenure, the City of Tamarac was recognized by the International City Management Association (ICMA) as a leader in Performance Measurement and Management. For the last eight years, Tamarac has won the Digital City in America Award for cities under 75,000 population. In 2022, the City of Tamarac won the International Public Management Association for Human Resources Small Agency Award for Excellence.

The three most significant issues facing the City of Tamarac are:

- Diversifying the tax base – the tax base is overwhelmingly reliant on residential property taxes. The importance of redevelopment and growing and attracting new commercial growth is a critical challenge for the City’s long-term financial stability. Economic development needs to be thoughtful to balance the tax base meaning approving the right development in the right places is more important than ever to maintain the community character balanced

KATHLEEN GUNN

with affording the rising costs of delivering services to 72,000 residents.

- Adapting to the changing demographics of the city – the City began as a retirement community. The population was predominantly white. As years went by, the community has changed, becoming increasingly diverse racially and the median age has gone down. These changes precipitated the need for programs and initiatives for younger people and families of all different walks of life. It also has created an increase in the City’s involvement in improving the quality of education in the community through advocacy and initiatives with the School Board of Broward County.
- Updating the water system – building a new water facility and expanding the water distribution system to parts of the City currently being served by the City of Fort Lauderdale – giving Tamarac greater control over the delivery of water to City residents for more affordable rates.

GENERAL, MANAGEMENT STYLE AND EXPERIENCE

Fernandina Beach is a premier community enjoying a unique character, beautiful natural amenities, and A rated schools. As a results-driven municipal executive with 20+ years of success in leading, managing and serving cities with populations from 50,000 to 175,000 in the states of Florida and New York, I bring a perspective from larger communities that have tried many different approaches to reaching successful outcomes. I am eager to put my energy, intellect, talent, and experience at the service of the city of Fernandina Beach to sustain and cultivate the prosperity the community enjoys.

Every community that I have served has grappled with the growing pains of development – particularly in Fort Lauderdale where we needed to set development guidelines in the downtown, along the New River, and at the Beach reeling in development that had gotten overly dense. I am committed to right-sized and appropriate thoughtful development that respects the integrity of the community character and enhances it. Under my leadership in Tamarac, the golf course thrived financially and given the opportunity, I would bring those lessons learned to Fernandina Beach. The sky is the limit for Fernandina Beach, and it would be my privilege to lead the community to realize its full potential.

As a City Manager, you must be agile. Throughout my career I have successfully managed teams that have constantly improved the way they have delivered vital programs and services, steering cities to find their niche, leverage their unique character and attract investors. I have done this

KATHLEEN GUNN

through modeling curiosity, commitment, and positive, affirming behavior that starts with how I show up as a leader.

My personal interactions with elected officials, community stakeholders and employees set the stage for what I expect to be the standard of respect embodied throughout the organization. Kindness and empathy are paramount as a leader and are characteristics that motivate the workforce to build unforgettable communities. Setting clear expectations and holding people accountable can be done kindly. When people are treated well, they work harder and are loyal and create cities where people want to invest, live, work, and play.

Seeing people for their gifts and talents and what they bring to the organization is extremely important. I regularly send handwritten notes to staff to recognize great work. It lets employees know that they are seen and that their contributions matter to me. As I visited departments in Tamarac, I would often see those same notes displayed on their desks. I got such great feedback from staff on those notes, they really meant a lot to them.

My team would say that I am a fair leader; that I care about them as people, I get my hands dirty and that I stand by them. They would say I respect them as professionals and give them the latitude they need to do their jobs, offering innovative suggestions and opportunities for professional growth while providing resources and support as needed. During my tenure as City Manager, I showed my commitment to employees by exponentially expanding employee wellness initiatives recognizing the deep impact of the pandemic on employee mental health which included creating meditation rooms at the police district office and in City Hall providing people with the opportunity to recharge during often stressful times.

I believe the elected officials I have served would likely also say that I am fair and deeply invested in the community and my responsibilities. They would say that I am a thought leader and provide wise counsel and treat them with respect recognizing our respective roles. They would say that they receive the same information at the same time yet feel equally important. I don't play favorites; I listen attentively and build consensus around often divergent perspectives attempting to get to win-win as often as possible. Elected officials would tell you that I am apolitical. I do not get in the middle of issues that do not directly relate to my area of responsibility.

My strengths lie in responding to community needs by shaping and executing a city's vision through strategic planning and implementation, completing capital improvement projects on time and on budget, teambuilding, and project management. In Tamarac we were able to respond to the community's needs for greater police visibility by implementing the Welcome Home Initiative wherein police officers stationed at rotating neighborhoods greeted residents after their

KATHLEEN GUNN

workday and advised them of ongoing safety initiatives and to provided them with educational materials.

My greatest strength is my ability to see the big picture, communicate the vision, build programs from the ground-up, and execute initiatives that make a difference. When I arrived in Tamarac, there was no viable economic development program although it was a city priority. Through tenacity and building a strong team I incepted and led the City of Tamarac's Economic Development program – it was a multi-pronged approach that included attracting appropriate commercial development, resulting in new housing and jobs, a workforce development program in partnership with Broward College that provides free training to underserved community members, and cultivated business for local restaurants during the pandemic through a marketing blitz – Savor the Flavors of Tamarac.

In terms of weaknesses, I am sometimes critical of myself and the outcomes that I achieve with my team. This flaw undervalues the importance of successful efforts that have major impacts on the community. I have learned over time to reframe and right-size my understanding and appreciate the importance of meaningful progress even if the result is not the perfect outcome I originally envisioned.

I am proud of successfully leading the City of Tamarac through several crises including managing viral police and commission incidents, hurricanes, a pandemic, and the arrest of my predecessor. My ability to stay calm in navigating extremely challenging circumstances while continuing to lead a cohesive team to execute plans effectively is second to none.

The person taking the job in Fernandina Beach will need to embed themselves in the community – they will need to get up-to-speed quickly, learning about the people and the City, demonstrating their ability to lead the community to continued success and improvement. Some of the challenges I see facing the City of Fernandina Beach are:

- Finding the balance between maintaining the small-town quality of life with a progressive, smart and financially sustainable city.
- Funding, financing and implementing a potential \$50 Million capital improvement program to upgrade City infrastructure and city facilities.
- Evaluating adequacy of staff resources to undertake and complete programs and projects that reflect industry best practices.
- Ensuring the marina and golf course become financially solvent and self-sufficient.

During the first six months my efforts will involve getting to know the community, elected officials, staff, organization, and culture. I will spend a lot of time listening and asking questions. Getting to know people and building trust takes time and effort. However, I understand city business continues to be ongoing with a new fiscal year about to get underway. I will begin by assessing city operations through meeting with elected officials and department heads in addition to becoming intimately familiar with the budget, Certified Annual Financial Report, and

KATHLEEN GUNN

Comprehensive Plan. It will be very important to tackle commission priorities related to development, resource allocation, infrastructure, intergovernmental relations, staffing, and financial sustainability of the City's marina and golf course, and parking.

In working with the media, I ensure that the information that is provided is accurate and timely. The public information function of a city is extremely important and needs to be used with great tact to communicate important messages to the community. We used social media strategically in Tamarac to communicate hurricane updates, to showcase community events and initiatives, to demonstrate the successes of law enforcement and to promote local restaurants during the pandemic. We interacted with the public in this way to expand our reach with timely and relevant information- balancing user fatigue with meaningful touchpoints.

Although you can't please everyone, I do not anticipate anyone contacting the City of Fernandina Beach with negative feedback on me personally, my decisions or leadership style.

In my leisure time, I enjoy spending time with my husband, walking along the beach, reading, yoga, rollerblading, cooking and hosting friends and family for meals.

SIX ADJECTIVES OR PHRASES I WOULD USE TO DESCRIBE MYSELF

- Ethical and Emotionally Intelligent Leader
- Collaborative Community Builder
- Urban Strategist
- Team Builder and Cultivator
- Expert Communicator
- Creative Visionary

REASON FOR DEPARTING CURRENT POSITION

I served the City of Tamarac for more than 5 years; as Assistant City Manager for four years and then stepped into the role of City Manager in a time of crisis and uncertainty. I said yes to the challenge and delivered the city from a place of crisis to a place of stability. Through a thoughtful discernment process, at the end of my contract term I assessed it was time for me to seek other opportunities to further my personal and professional goals.

MOST RECENT SALARY

My final compensation at the City of Tamarac was \$225,000 plus a vehicle and cell phone allowance in addition to other benefits.

CB&A Background Checks

**Background Check Summary for
KATHLEEN ANN GUNN**

Criminal Records Checks:

Nationwide Criminal Records Search	No Records Found
County	
Miami-Dade County, FL	No Records Found
Broward County, FL	No Records Found
New York County, NY	Not Available*
State	
Florida	No Records Found
New York	Not Available*

Civil Records Checks:

County	
Miami-Dade County, FL	No Records Found
Broward County, FL	No Records Found
New York County, NY	Not Available*
Federal	
Florida	December 2015 – Civil rights lawsuit filed against the City of Miramar including Ms. Gunn in her individual and official capacities as Assistant City Manager. May 2017 – Terminated. January 2018 – Voluntary Dismissal with Prejudice. <i>*See personal disclosure for candidate explanation for records found.</i>
New York	Not Available*

Motor Vehicle

Florida	No Records Found
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*Records are only available in this state for the past seven years and the candidate worked there prior to that period.

**Background Check Summary for
KATHLEEN ANN GUNN**

Credit	Excellent
Personal Bankruptcy	No Records Found
Sex Offender Registry	Not Listed
Education	Confirmed
Employment	Confirmed
Social Media	Nothing of Concern Found

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

Background Check Summary for KATHLEEN ANN GUNN Personal Disclosure

Personal Disclosure Questionnaire

Name of Applicant:

Kathleen Gunn

The following questions are designed so that we will be able to make full disclosure to our client concerning your background. Please answer them honestly. Cutting corners or misrepresenting your past will result in you being eliminated from all further searches conducted by this firm. We understand that frivolous charges are sometimes made and that charges do not mean you were guilty. We also understand that you may have been wronged and needed to seek compensation. The bottom line is that we want to be certain that our client is fully informed. If you have any questions, please contact us for clarification.

Please explain any yes answers on a separate sheet of paper.

1. Have you ever been charged or convicted of a felony?

Yes ☐No ☒

2. Have you ever been accused of or have been involved in a domestic violence or abuse incident?

Yes ☐No ☒

3. Have you ever declared bankruptcy or been an owner in a business that did so?

Yes ☐No ☒

4. Have you ever been the subject of a civil rights violation complaint that was investigated or resulted in a lawsuit?

Yes ☐No ☒

5. Have you ever been the subject of a sexual harassment complaint that was investigated or resulted in a lawsuit?

Yes ☐No ☒

6. Have you ever been charged with driving while intoxicated?

Yes ☐No ☒

7. Have you ever sued a current or former employer?

Yes ☐No ☒

8. Please list links to all your social media accounts (Facebook / Instagram / LinkedIn / Twitter, etc.) and your personal web page if you have one.

9. Is there anything else in your background that, if made public, would cause you, our client or our firm embarrassment if it came to light through the press or any other mechanism?

Yes ☐No ☒

10. Please provide a list of any lawsuits in which you are or have been a party either as plaintiff or defendant.

Merlene Patrice Bourdeau - Quispe, Plaintiff vs
City of Miramar, Valerie Gammon, in her
individual and official capacities,
Kathleen Gunn, in her individual and official capacities,

Attested to:

Kathleen Gunn

Signature of Applicant

Please email this form via PDF DOCUMENT to Monique@cb-ast.com or via fax to
(561) 621-5965 no later than 5:00 PM MST 07/17/2023.

(Note: Please be sure to sign the form with your actual signature if you are sending Fax or PDF Document)

Property of Colin Baenziger & Associates

The lawsuit was
dismissed without
prejudice.

in his individual and official
capacities
Case No. 15-cv-
62711-DPG

**Background Check Summary for
KATHLEEN ANN GUNN
Personal Disclosure Explanation**

From: **Kathleen Gunn** <kgunn96@gmail.com>
Subject: Re: Forms as requested
To: Monique Rogers <monique@cb-asso.com>

Good evening, Monique,

I was named in a lawsuit against the City of Miramar and several other employees by a terminated employee in an employment matter that was later dismissed pursuant to the Plaintiff's Notice of Voluntary Dismissal with Prejudice.

Please let me know if you need any further information.

Thank you,
Kathleen

CB&A Reference Notes

Reference Notes

Kathleen Gunn

Julie Fishman – Former Commissioner, City of Tamarac, FL 954-461-1311

Ms. Fishman has known Ms. Gunn since 2017. Ms. Gunn was an excellent manager. She was always very conscious of time frames and when the Commission needed something it was always a quick turnaround. She was always very good about making sure that she understood what was needed, so that she had it right the first time.

Ms. Gunn was part of the interviewing and hiring process. The team hired some great people, the quality of their staff is impressive. Her decisions are good. She is innovative, a change agent, and she maintains the organization at a high level. She shared great ideas from her previous employment if she thought they would benefit Tamarac.

Visible in the community, Ms. Gunn communicated well with the public. She was very well liked and listened to learn how the residents felt. She was good about keeping everyone informed. Her job revolved around leading the team to resolve issues. She encouraged staff to share their ideas and concerns so they could work through them together.

When the Commission asked for something, and specified a time constraint, Ms. Gunn always returned with the information well before the deadline. She is very calm in stressful situations. She stays focuses on the resolution rather than becoming caught up in the emotion.

Nothing in Ms. Gunn's past would concern an employer. The current Commissioners are more politically motivated than past Commissioners, but she was good at maneuvering the environment and dealing with the personalities.

Ms. Fishman would definitely hire Ms. Gunn as she is a good manager. Even in the most frustrating times she kept her cool, which is important working in a City of any size.

Words or phrases used to describe Kathleen Gunn:

- Hard working,
- Cheerful,
- Calm,
- Timely,
- Team builder, and
- Team member – lets others shine.

Strengths: Communication. One example is that she clarifies what she thinks that the Commission is asking her for to ensure that she understood correctly.

Weaknesses: None identified.

Reference Notes

Kathleen Gunn

Percy Sayles – Fire Chief and Interim Assistant City Manager, Tamarac, FL 954-557-4446

Mr. Sayles worked with Ms. Gunn from 2017 to 2023. When Ms. Gunn became the City Manager, she appointed Mr. Sayles as the Interim Assistant City Manager and they worked very closely together. When Ms. Gunn met with Mr. Sayles after becoming the manager, she commented on all the work he had done over the years. She sees employees, and their efforts, which helped the staff to feel valued.

When hiring, Ms. Gunn does a good job reading the resume and the people. She takes the time to get to know them and does a good job evaluating talent. She is a deliberate decision maker who recognizes the consequences of actions and does not rush to a solution. That said, she can make a quick decision when needed.

Some managers come in and immediately make changes which is very disruptive. Ms. Gunn took the time to view the scenery, and once she had a handle on how the organization worked, she began to implement her ideas and adjust processes to improve operations. Her approach was very appreciated. Right before she left, she brought the staff together and gave a speech that was extremely moving. She was very good to the staff. She was also very engaged with the business community which made a significant difference to the City. She sent employees to conferences, ran bus tours for vendors, and brought industry to the community. She did a great job.

As Assistant City Manager Ms. Gunn wrote speeches for the City Manager. Once she became the manager, she then gave the speeches. She led events like the Fourth of July celebration and Reaching for the Stars. She was excellent with the public and was the primary complaint taker so when citizens had issues, they came to her. She was very personable and warm, without being aggressive. She was easy to relate to.

A water main break on the east side of the city left residents without water for at least a week. The water in that section of town was purchased from Fort Lauderdale which meant that Tamarac had no control over the water system but was responsible to the citizens who live in the area. The situation was incredibly difficult. Ms. Gunn brought the team together and they brainstormed on what they could do and what resources were needed. They held community meetings, did water drops for residents, and put notices on their doors. She dealt with the political aspect and the expectations of the community. She did a great job leading them through the crisis. She was good at networking and her contacts from when she worked in Fort Lauderdale were beneficial. She kept everyone informed along the way.

Ms. Gunn oversaw the finance department and gained experience managing the budget. She was detail oriented. She did not try to do accounts receivable, but she understood the budget and did a good job managing it.

Commissioners often have different objectives, and their individual goals can be different from what the residents want. Ms. Gunn was responsible for the redevelopment of the strategic plan, and she did a great job leading the process with the elected officials and the residents. During

**Reference Notes
Kathleen Gunn**

covid, she established a testing site very quickly. She led quite a bit of development including parks, a fire station, and the downtown area, which were all time sensitive. Every week she asked the employees working on each project to provide an update.

Tamarac is a great City, but the politics can be tricky. Their long tenured manager was arrested, and Ms. Gunn was thrust into the role immediately. Also, the employees are fantastic, but they have had some controversial construction projects that have been political hotbeds. She is no stranger to controversy and led the organization through it. Nothing in her background or conduct would concern a reasonable person. A Commissioner wanted a manager who would do exactly what he said regardless of the impact on the community. Ms. Gunn decided to resign rather than to move forward with a direction she felt would be detrimental to Tamarac.

Mr. Sayles would definitely hire Ms. Gunn and would work with her again. She is a pleasure to work with and managed the City well. Every department head felt she was the right person to become the manager at the time she did, and she was also the right person for the community. Her departure was a great loss.

Words or phrases used to describe Kathleen Gunn:

- Thoughtful,
- Strategic thinker,
- Focused,
- Values employees,
- Dedicated, and
- Puts community needs first.

Strengths: Hard worker, detail oriented, connects the dots very well. She understands the nuances of the community perspective, elected officials, and employees and does a good job connecting them.

Weaknesses: She has a heart for people, which is a strength and a weakness at the same time. She really cares about people and doing the right thing.

Elvin Villalobos – Commissioner, City of Tamarac, FL 954-597-3460

Mr. Villalobos has known Ms. Gunn since 2020, when he was elected to the Commission, and she was the Assistant city Manager. They worked together on several projects from construction and approving materials.

The City Manager was arrested, and Ms. Gunn stepped into the role. She was the best candidate as she was already in the know, and she helped them through a great deal of turbulence. She kept everything under control without even the slightest disruption in service and in the organization.

Reference Notes

Kathleen Gunn

She was a wonderful manager who held the ship through some very challenging times and did so quite well.

The City did not have a big turnover while Ms. Gunn was in charge, which speaks to her hiring and management ability. The hiring process was a team effort, but the City Manager's office had two phenomenal hires while she was the City Manager. She makes good decisions generally.

Ms. Gunn attended community meetings and participated in the big events. She set the stage for the elected officials who are the face of the organization and did not try to upstage them. She kept the elected officials very informed. She was very engaging, and she was always available to them. She treated all the elected officials the same and did not show any bias. When they requested something from Ms. Gunn, they never had to ask a second time.

In terms of finance, Ms. Gunn was never over budget, but her role was more oversight than in working the actual numbers. She reviews the budget periodically and is a good juggler of the resources. She has a good financial skillset, and she stays on top of the budget.

Mr. Villalobos is not aware of anything controversial that involves Ms. Gunn. Nothing in her conduct or background would concern an employer. She left Tamarac because her family was living some distance from the community.

Mr. Villalobos would hire Ms. Gunn. In fact, he left the door open for her to come back if her family were to move closer to Tamarac. He was so sad when she told him she was leaving, she is a great employee. Anyone who hires her will be making a great decision. She has the experience and background, and her time in Tamarac only polished her skillsets.

Words or phrases used to describe Kathleen Gunn:

- Clever,
- Aggressive and gentle at the same time,
- Stands on her own two feet,
- Very happy and charming,
- Very honest,
- Hard worker,
- Always strives to do better, and
- Down to earth personality.

Strengths: Team collaboration, very honest, very open, has an open door with staff and residents.

Weaknesses: She could be a little tougher, and say no more often, but she creates a great product.

**Reference Notes
Kathleen Gunn**

Jon Herin – City Attorney, City of Tamarac, FL 305-409-0107

Mr. Herin worked with Ms. Gunn for about two years starting in 2021. While Mr. Herin was an external attorney, they interacted on an almost daily basis. Their interactions were very good, and she was always professional.

Ms. Gunn appreciates and welcomes team input from those she works with, which is such a valuable trait in their work. She inherited a fairly complete staff when she became manager, but a number of them were interims. She gave the interims an opportunity to prove themselves and if they did, she promoted them. If not, she hired someone from the outside. Her decisions on who to promote, and when to hire from outside, were very good as were her decisions in general.

Ms. Gunn made it a point to attend community events and be out in the community. She was very visible and attended events like the Veteran's Day Celebration, and the 911 memorial event. She was very responsive.

One of Ms. Gunn's assets was her willingness to listen and take other positions into consideration when preparing to make recommendations to the Commission. They communicated on a wide range of matters that impacted their respective areas of responsibilities. She was a good team player.

The last year as manager, Ms. Gunn proposed a budget that included an increase in millage rate which required a super majority vote. Two of the five Commissioners refused to adopt the budget as it was. The budget hearing lasted several hours, and they went around and around. She could see that the budget would not be adopted. On the fly she met with senior staff in a side room, reworked the budget, and moved some things around. The budget was passed that evening by a 5-0 vote.

While Ms. Gunn works well in stressful situations, she will not compromise herself for political expediency. The Commission was split and did not see eye to eye. Meetings were often heated. She realized that her peace of mind was important and decided to resign. She is principled and ethical, which is a rare commodity in the business they are in.

None of the controversy in Tamarac was caused by Ms. Gunn. Mr. Herin is not aware of any negatives in her background. Every public official has critics, a manager cannot make everyone happy. That said, those in Tamarac, and in the region, have said they enjoyed working with her and thought highly of her.

Mr. Herin would hire Ms. Gunn. Everyone speaks very highly of her and her work. She would be an asset to any community. She is a great manager.

Reference Notes Kathleen Gunn

Words or phrases used to describe Kathleen Gunn:

- Team player,
- Listens well,
- Thoughtful – thinks out her position before stating it,
- Tenacious,
- Principled, and
- Ethical.

Strengths: Listens, takes input from all involved before making a decision, team player, gets along well with others which is important in the work they do.

Weaknesses: She has only been a City Manager for a short time. That said, she was an assistant manager for a long time and has an extensive background in the public sector. Dealing with the challenges in Tamarac provided even more experience on how to deal with stressful situations and varied interests that pull in different directions.

Laura Karpaviciute – Assistant to the City Manager, City of Tamarac, FL 561-674-2014

Ms. Karpaviciute has known Ms. Gunn since 2017. Ms. Karpaviciute worked with Ms. Gunn both as the Assistant City Manager and the City Manager.

Ms. Gunn is excellent. She is very people focused and knows how to bring out the best in the employees. She is really great at recognizing their strengths and then deploying them. She is very personable and very caring. She teaches employees what they need to learn without making them feel like they are lacking. She is very intelligent and a great leader. She can put things together that others cannot connect. She excels at building organizational culture and is innovative, creative, and strategic. She has the vision and knows how to get there.

The culture in the manager's office was good, they were a tight group. Everyone pulled together and helped each other. Ms. Gunn made great decisions, both when hiring and in general. She is generally very good with people, both in the organization and in the community.

As a manager, Ms. Gunn does not feel the need to be in the weeds with employees, but if she does not know something, she will ask about it to learn. She picks up on things that need to be improved, both in terms of people and processes. She keeps everyone informed.

Through regular staff meetings Ms. Gunn kept everyone in the loop. Directors felt comfortable going to her to discuss matters. She led the team through the covid pandemic. During the George Floyd event she had an impactful conversation with the executive team that ended up in a partnership with human resources. They scheduled time for conversations with employees where

Reference Notes

Kathleen Gunn

they could openly talk about how what was happening nationwide impacted them personally. Having an outlet in the workplace was meaningful to the employees.

When it came to contracts, Ms. Gunn realized when they were not the best deal for the City. Her financial skills were good. When the City Manager was arrested, she stepped into his role. Also, there was some conflict among elected officials which can create challenging situations and she handled it all well. She was very big on mental health and wellness. She implemented a relaxation room for employees. She knew the techniques and applied them to herself and her work, which helped her team thrive.

Ms. Karpaviciute is not aware of anything controversial that involves Ms. Gunn, nor does she know anyone who has a negative opinion of Ms. Gunn. Ms. Karpaviciute would definitely hire Ms. Gunn. She is a great manager, and you cannot go wrong with her.

Words or phrases used to describe Kathleen Gunn:

- Enthusiastic,
- Smart,
- Caring,
- Driven,
- Focused,
- Works very hard,
- Always planning the next thing,
- Great with people, and
- Great leader.

Strengths: People skills, very bright, organized, great common sense, innovative. Knows how to work with all kinds of people and different personalities. She is great with elected officials and is always respectful of them.

Weaknesses: None identified.

Barbara Tarnove – President, Tamarac Historical Society, Tamarac, FL 954-328-0401

Ms. Tarnove has known Ms. Gunn since 2017. Ms. Tarnove works closely with the City, but the Historical Society is a separate organization. Every interaction with Ms. Gunn was a pleasure. She was so sweet and accommodating while providing anything that was needed. She was easy to approach and had great ideas.

A visionary, Ms. Gunn worked to bring new businesses and developers to Tamarac. At a convention in Orlando, she invited vendors to Tamarac and took them on a bus tour through the city, which had never been done before.

**Reference Notes
Kathleen Gunn**

Everything that Ms. Gunn did was in the best interest of the city and its residents, and everything that she proposed worked out the way that she expected it to. She made good decisions and was savvy enough to be able to see the outcome of various initiatives before moving forward.

Ms. Gunn was very involved and attended every event because she understands the importance of being connected to the community. She interacted extremely well with the Historical Society. She offered suggestions and it was more of a collaboration. Ms. Tarnove appreciated that Ms. Gunn did not come in and try to tell them what to do.

When Ms. Gunn received an email or text, she generally responded within twenty minutes even if it was just to explain that she was in a meeting and would call when the meeting was over.

Ms. Tarnove is not aware of any negatives in Ms. Gunn's background or conduct that would concern a reasonable person. Ms. Tarnove does not know anyone who would disagree with the statements in this reference.

Ms. Tarnove would hire Ms. Gunn as she was a good manager for Tamarac. Ms. Tarnove was very sorry to see Ms. Gunn go. Ms. Gunn is one of those rare individuals that does not try to make it all about her. She truly cares about others.

Words or phrases used to describe Kathleen Gunn:

- Friendly,
- Approachable, and
- Knowledgeable.

Strengths: Approachable, personable, visionary.

Weaknesses: Anyone who covers as much territory as a city manager has to have fingers in everything going on while doing the best job they can, and it can be challenging.

David Hebert – City Manager, City of Oakland Park, FL 954-630-4596

Mr. Hebert worked with Ms. Gunn from 2004 to 2010 for the City of Fort Lauderdale. They have stayed in touch and have continued to collaborate. She was an exceptional employee.

Economic development, redevelopment, and working with small businesses in the community were Ms. Gunn's claim to fame in Fort Lauderdale. She oversaw the administrative departments that were primarily focused on these areas. She understands how to crunch numbers, set timelines, establish goals for the community and work with businesses. She is beyond competent, and her decisions are always, or almost always, very good.

Reference Notes

Kathleen Gunn

When Ms. Gunn walked into a room everyone loved her. She was charming and graceful. Fort Lauderdale had a bond referendum for a Fire Station that went to the voters. They worked closely together, and Ms. Gunn was wonderful about passing along information. The effort extended beyond both of their tenures, but it was very successful. She was an excellent partner in working through cross disciplinary challenges.

Not a procrastinator, Ms. Gunn accomplishes the work and always delivers a first-rate product. She is very much on top of her game and a person of her word. When she tells you she will have something to you by a certain date, it is never late. She is extremely disciplined.

The City Manager was arrested and taken out of City Hall in handcuffs, which was a stressful time for the organization. Employees wondered what involvement they might have had, and if they would still have a job. Ms. Gunn stepped into the role, and she handled it very well.

City Managers must deal with the mixed priorities and challenges of the political process. Ms. Gunn handles it well and does not create or add to the controversy. She never rubs people the wrong way and does her job without taking anything personal. She is so likeable and charming, which helps in working with residents who are unhappy about decisions made.

There are advantages to being hired from outside the organization and advantages to being promoted internally. While the elected officials were disappointed when Ms. Gunn resigned, some of them had residual predispositions based on the events that occurred. In addition, Tamarac was quite a distance from where her family was located. However, the City would hire her back in a heartbeat.

When Mr. Hebert had a position open, he offered it to Ms. Gunn. She decided not to step back into the Assistant role. It took him several months to find the right person, but Ms. Gunn was his first choice for the role. He would not hesitate to hire her. She is an exceptional Manager. She is extremely qualified. She will do wonderful things wherever she goes.

Words or phrases used to describe Kathleen Gunn:

- Leader,
- Confident in decision making,
- Very disciplined,
- Compassionate, and
- Will excel in any role.

**Reference Notes
Kathleen Gunn**

Strengths: She has a deep understanding of finance, timelines, projects, and anything related to economic development. Very personable, very qualified, and experienced.

Weaknesses: Like most managers, she could take more time to craft a strategy that will not be riddled with political minefields, but she does well at being sensitive, conscientious, and mindful of the political trip wires.

Sam Goren – Former City Attorney, City of Tamarac, FL 954-610-7152

Mr. Goren was the external City Attorney while Ms. Gunn was the Assistant City Manager. They met around 2020 and had a number of interactions during that time.

Being very collaborative, Ms. Gunn made good decisions. She was engaged with the community and the stakeholders, particularly the businesses. With the public she was very respectful and courteous, but also effervescent. She keeps everyone informed.

Being in charge of economic development, Ms. Gunn was typically the liaison between the City Manager, the Director, and the business community. She understands financial matters and has a good sense for local government fiscal matters. She responds well to stress.

Ms. Gunn has not been involved in anything controversial, either personally or through her work. Mr. Goren does not give references lightly, and the fact that he is willing to provide this reference shows his level of confidence in Ms. Gunn. She would be a great manager. She is highly qualified and has the right skillset yet is youthful enough to be animated and excited about the work. She is very thoughtful.

Words or phrases used to describe Kathleen Gunn:

- Engaged,
- Intelligent,
- Thoughtful,
- Respectful,
- Electric, and
- Animated.

Strengths: Exceptional, dedicated, hardworking, thoughtful, good manager, engaged.

Weaknesses: While she can be overly zealous about her work, she does not have any negative attributes.

Prepared by: Lynelle Klein
Colin Baenziger & Associates

CB&A Internet Research

**Internet – Newspaper Archives Searches
Kathleen Gunn***(Articles are in reverse chronological order)*

Tamarac Talk (FL)
November 3, 2022

Tamarac City Manager Hands in Resignation Notice

Author: *Agrippina Fadel*

City Manager **Kathleen Gunn** offered her resignation on Thursday, so the new commission members elected on November 8 would have an opportunity to “select the city manager of their choice.” **Gunn** sent the email to the city commission, stating, “Kindly be advised that per my employment contract, this letter will serve as notice of my intention to step down as city manager at the end of the contract term. This notice will begin the transition period of 120 days until the term ends.” She added that she “deeply believes” that the new commissioners should have a chance to “start anew.” **Gunn** thanked the commission for having faith in her and her team to help guide the city over the past year. “With your support, we have been able to move this city forward in a positive direction, and I am proud of our accomplishments,” she added.

According to an anonymous source in city hall, **Gunn’s** decision might have less to do with her desire to give the new commission a chance to choose someone else and more with the items on the referendum up for the vote on November 8 and the possibility of Vice Mayor Mike Gelin winning the mayoral race and Stuart Michelson taking the District 2 commissioner seat. The two items have residents deciding whether the city commission needs a majority or a super-majority to remove the city manager and discusses the city manager’s authority and ability to appoint assistant city managers, department heads, and city clerk with or without the city commission approval.

Kathleen Gunn officially took on the role of Tamarac city manager on December 8. She was appointed interim city manager on August 31, 2021, after the former City Manager Michael Cernech was arrested on September 2, 2021, on alleged charges of conspiring to extort money from developer 13th Floor Investments. During the lengthy salary and contract negotiations, Commissioner Marlon Bolton and Gelin had a lot of questions and concerns about **Gunn’s** qualifications, pay, and future performance. Both voted no when the commission approved her employment agreement.

Mayor Michelle Gomez said **Gunn** was to become Tamarac’s first female city manager and wondered if the commission would be putting her through the same grueling process if she were a man. Before being hired as assistant city manager in 2017, **Gunn** worked for the City of Miramar from 2014 to 2017 and Fort Lauderdale from 2004 to 2011 in the same role. **Gunn** graduated from Pace University in New York with a bachelor of arts in political science and government and a master’s in public administration. She also earned her master’s in pastoral ministries from St. Thomas University.

**Internet – Newspaper Archives Searches
Kathleen Gunn***(Articles are in reverse chronological order)*

Tamarac Talk (FL)
September 15, 2022

Discussion Becomes Political During Budget Meeting

Author: *Agrippina Fadel*

Tamarac city commission approved the proposed not to exceed the millage rate of 7.2000 mills for the taxable year 2022. The rate discussion at the first budget meeting on September 12 turned into a political debate at one point, with Vice Mayor Mike Gelin suggesting cutting it down to 7.0000 and Mayor Michelle Gomez calling his proposal a “great little soundbite in an election year” that would “not work out in reality” and is a “disservice to the community.” Both are running for the mayoral seat in the November election.

Jeff Streder, Budget Manager for Tamarac, explained that, while the millage rate of 7.2000 mills matches the 2022 rate, if it is adopted, the residents with a median taxable home will pay, on average, \$40 more than last year. Cutting the rate by a tenth of a mill means the residents will save \$14, while the city budget will not receive around \$500K in taxes. Cutting it by a tenth of two mills means Tamarac’s budget will be missing a million dollars, while the savings to a single household will be only \$28. Streder said the proposed rate exceeds the rolled-back rate of 6.4387 mills by 11.82%. He explained that the millage rate is a multiplication rate applied to every \$1000 in taxable value that determines the amount of taxes a house owner owes to the city. For a Tamarac home valued at \$150,000, the ad valorem tax would be \$1080: total value divided by 1000 and multiplied by the amount of the millage rate.

The proposed rate supports the operating budget for the fiscal year 2023 and will allow the city to maintain current service levels to residents, provide funding for three additional full-time positions, and convert an existing part-time position to full-time. He added that the funding for capital improvements in 2023 would again rely heavily on appropriated fund balance, as it had for years. “[The] city reached a point a few years back where no annual operating revenue is available to fund capital improvements, so we look to the undesignated savings for general fund savings to fund those projects,” Streder said, adding that if approved, the millage rate will fund the desired level of capital improvement projects.

Gelin said with the “challenges in the economy,” the city should lower the taxes for the residents, going as far as emailing a spreadsheet with his interpretation of the budget numbers to the city staff during the commission meeting. He took the data that the staff gave the commission and “put in in an easier to read format,” to which City Manager **Kathleen Gunn** said she and her staff did not have a chance to see it. Gomez suggested the document should have been sent out in advance. To Gelin’s question of why the city can’t wait with the capital improvements until the economy is better, **Gunn** replied that the city had put off such improvements for the past two years. “The residents expect the city to take care of them,” **Gunn** added. She called the proposed budget “measured and thoughtful” and said “it does not unduly burden taxpayers yet is sufficient” for the city to continue contributing to the high-level quality of life that residents and businesses expect.

Internet – Newspaper Archives Searches**Kathleen Gunn***(Articles are in reverse chronological order)*

Gomez said that the city leaders know that residents want paved and clean roads, maintained parks, and clean water, and expect the capital improvements projects to be done after being put on hold for a few years. “It is a rough balance to figure out if we help out every home at approximately \$14 to \$35 savings in taxes per year, depending on the value of their home, and figuring out where the city can cut half a million dollars [for each tenth of a mill cut] in programming and services to the residents and business owners,” said Gomez.

Gelin said Tamarac should drop the millage rate and concentrate on bringing new developers into the city and getting more business taxes. “There are certain things that sound really good,” said Gomez, “but in reality and practice, they don’t work out well. As much as the city is doing a great job trying to bring in businesses and economic development, it takes years for them to get online.” She said cutting the rate point two mills will take a million dollars out of the city’s budget that could pay for services residents need and request. “We didn’t cause inflation, and neither did the city of Tamarac,” said Gomez. “We are all trying to deal with the same economic issues going on in this country,” said Gomez, adding that the staff always works in the interest of the residents while operating at 2.8 city employees per capita instead of 4, as they are supposed to.

The commission approved the 7.2000 millage rate with a 3-2 vote, with Gelin and commissioner Marlon Bolton voting no. Since the approved rate is not to be exceeded, at the second budget meeting on Tuesday, September 22, at 5.05 p.m., the commission can recommend lowering the rate but not making it higher.

**Internet – Newspaper Archives Searches
Kathleen Gunn***(Articles are in reverse chronological order)*

Tamarac Talk (FL)
June 1, 2022

Tamarac to Build More Sidewalks, Bike Lanes, to Become Fully ADA Compliant

Author: *Agrippina Fadel*

Tamarac needs more sidewalks, bike lanes, and ADA-approved shuttle stops to make the city more accessible and compliant with the Americans with Disabilities Act. The city commission reviewed the final version of the ADA Transit Access and sidewalk GAP analysis plan at the workshop on May 23. In early March of last year, the project kicked off and took about nine months to complete.

Darci Mayer, Broward MPO Senior Transportation Planner, said the analysis included an evaluation of access to transit in a quarter-mile radius of the city's two community shuttle routes: Red Route and Red Extension Route, with 21 stops in total; and 10 Broward County Transit (BCT) stops selected by the city staff. "When the city's ADA transition plan was updated in 2020, one of the priorities was new sidewalk installations. This plan will help the city with that effort," she said, adding that Tamarac is a very vibrant city with a lot of pedestrians and cyclists. The plan identifies sidewalk and bike lanes gaps and offers a prioritization schedule and cost estimates. It will also help the city bring the community shuttle stops to ADA compliance, making the routes eligible for Broward County surtax funding.

Mayer said bringing shuttle stops up to code with immediate upgrades will cost the city around \$48K but save money in the long run because the county will fully fund the routes once Tamarac has all the stops fully ADA compliant. "We also got input from community shuttle riders with online and paper surveys," said Mayer. She added that the analysis evaluated the movement of people in the areas around the shuttle stops and identified needs and deficiencies and potential improvements for all users, including pedestrians, cyclists, and people with disabilities. "Twelve out of 21 stops that were analyzed need upgrades to become fully ADA compliant. Within the quarter-mile radius of all the transit stops, the city needs 32,894 linear feet of sidewalks and 132,027 linear feet of bike lanes installed," said Mayer. She added that potential funding options include local, state, and federal programs. The plan identifies immediate, short, and long-term implementation timeframe. Commissioner Debra Placko said the presented plan is excellent and very comprehensive. "I will just encourage the city staff to start applying for funding through various programs now because, as we all know, it takes a very long time to get funding, especially with surtax," she added.

City manager **Kathleen Gunn** said the analysis is a part of the city's ADA transition plan. Some of the costs are more immediate than others, which helps the city prioritize. "This is an ongoing process that we will continue to work on, but it doesn't mean everything will get fixed immediately. We will focus on necessary upgrades first, but these are ambitious, long-term projects that give us a framework within which to attack the situation," **Gunn** explained.

**Internet – Newspaper Archives Searches
Kathleen Gunn**

(Articles are in reverse chronological order)

<https://www.sheriff.org/PIO/BSONews/Pages/THE-TAMARAC-ZEN-DEN-A-FOCUS-ON-MENTAL-HEALTH-.aspx>

May 31, 2022

THE TAMARAC ZEN DEN: A FOCUS ON MENTAL HEALTH

Author: Jeff Lennox

The Broward Sheriff's Office Tamarac District command implements a thoughtful initiative during Mental Health Awareness Month. The new Tamarac employee wellness program, or Tamarac Zen Den as it is affectionally called, has one primary goal - to provide a respite for employees who have experienced trauma from a call, stress, fatigue, or need a moment to gather their thoughts.

BSO Major Aimee Russo, Tamarac District Captain Jeffrey Cirminiello and Tamarac City Manager, **Kathleen Gunn** collaborated to create this initiative. "First responders are more likely to suffer from depression and PTSD because of the critical incidents they see. Over their career, they see repeated trauma or violent incidents. The Tamarac Zen Den is a room where our employees can come in and have a respite from the calls that they are on. If they respond to a critical incident or a traumatic scene, they can come into this room and relax for a couple of minutes, regroup, and refocus. That places them in a better position to respond to the next call," Major Russo said.

Tamarac District command upgraded a room and turned it into a small oasis with plush carpet, fresh paint, soft lighting, curtains, soothing music, and a massage chair. Participants are permitted to use the Zen Den on duty so long as their supervisor is aware.

"The isolated room is equipped with a zero-gravity chair, access to the Calm App with various self-guided meditation programs, and literary resources on stress management. It is essential to recognize that it's okay not to be okay," Captain Cirminiello said.

The Tamarac Zen Den was created with the complete support of Tamarac City Manager **Kathleen Gunn**. "We know we have to take care of our physical health, but our emotional and mental health is hugely important too. We as employers need to value the importance of allowing our staff to recharge. Particularly those we ask to go into violent situations and who are on the frontlines," **Gunn** said.

The mental health of the first responder community should not be ignored. It is time to end the stigma that mental well-being isn't necessary and provide a place where our heroes can refocus. "Ultimately, they will become better officers, better deputies, better people for our community when they deal with the stress," Captain Cirminiello said.

**Internet – Newspaper Archives Searches
Kathleen Gunn***(Articles are in reverse chronological order)*

Tamarac Talk (FL)
December 10, 2021

Commission Votes 3-2 to Make Kathleen Gunn Tamarac's First Female City Manager

Author: *Agrippina Fadel*

Kathleen Gunn has officially taken on the role of Tamarac city manager after the city commission voted to move her contract forward on December 8. **Gunn** receives \$225,000 per year and will get the retroactive pay from the months she worked as an interim city manager after being appointed on August 31. When **Gunn** presented her new employment agreement at the workshop on October 27, the commission members had a lot of questions and asked for a few parts of the contract to be revised.

Commissioners Mike Gelin and Debra Placko voiced their performance management and appraisal concerns. Commissioner Marlon Bolton asked if the city has benchmarked **Gunn's** proposed salary to city managers' salaries in neighboring towns. Carmen Rodriguez, **Gunn's** attorney, considers her client's request modest compared to the previous city manager's salary, or the \$264,000 the city manager of Coconut Creek earns. The city manager of neighboring Coral Springs makes \$279,000.

On Wednesday, Bolton had more questions and concerns about the contract, stating he did not have enough time to look over it. "While **Gunn** is extremely qualified, I am still hesitant to make her our city manager. She is not necessarily ready for the job." Bolton added that he wants to discuss the contract with **Gunn** before he is willing to cast a supportive vote. Placko said she trusts **Gunn** will do a great job but is concerned about the contract missing the clear performance evaluation guidance. "We have to allow her to know how she is going to be evaluated. Without telling her that upfront, we are not being fair to **Gunn**," Placko added.

Rodriguez said that while she appreciated the objective to protect **Gunn**, the contract and the performance appraisal are not linked as a matter of labor relations. She reminded the members of the commission that they could change the performance standards at any time. On behalf of her client, Rodriguez asked the commission to vote on the employment agreement and then discuss the performance evaluation during the strategic planning. "When you look at the issues of fairness, job security, and expectations, we had done everything that you had requested when you requested it. You wanted this employment agreement patterned after Coral Springs and Sunrise. We went back and did exactly that," said Rodriguez.

Both cities have city managers agreements that call for a two-tier process – to first have a contract in place and then develop objectives for performance appraisal that eventually become part of the existing contract. "We brought you back exactly what you directed," said Rodriguez. Gelin said the commission has been fair to **Gunn** by not subjecting her to a wide search for other candidates and competition. "You have to understand our hesitation to move too quickly on the contract when we had a prior city manager that committed crimes against developers. We want to make sure we dot all the i's and cross all the t's," he added.

Internet – Newspaper Archives Searches**Kathleen Gunn***(Articles are in reverse chronological order)*

Vice Mayor Elvin Villalobos sees all the changes the commission had requested implemented in the employment agreement, said it was unfair to prolong confirming **Gunn's** contract. Mayor Michelle Gomez said **Gunn** will be the first female city manager on Tamarac and wondered if the commission would be putting her through the same process if she were a man. "It is our job to deal with performance evaluation, and we have not done it. We cannot piggyback it to **Gunn's** contract. We are doing a disservice to our city and showing that we cannot stand by our words, and we look foolish. I don't like to look foolish," she said. The commission members voted 3-2 for **Gunn's** employment agreement, with Gelin and Bolton voting no.

**Internet – Newspaper Archives Searches
Kathleen Gunn***(Articles are in reverse chronological order)*

Tamarac Talk (FL)
November 6, 2021

Kathleen Gunn Talks Money, Prepares to Take on Role of City Manager

Author: *Agrippina Fadel*

Kathleen Gunn is getting prepared to take on the job of city manager permanently.

On October 27, Interim City Manager **Gunn** presented her employment agreement and compensation package to the commission. She is asking for \$225,000 per year—less than the \$272,000 salary of former City Manager Michael Cernech. However, Cernech was city manager for ten years, until his September 2 arrest on alleged charges of conspiring to extort money from developer 13th Floor Investments. On August 31, the commission appointed **Gunn** as interim city manager.

Gunn told the commission that it had been a tumultuous year for the city, with tremendous change and unexpected disruptions. “As a career-long public servant, I felt a call of duty to serve you all, those who the electorate has entrusted to lead the city. It was a right thing to do at the time of profound crisis,” she said about her decision to step up as an interim city manager.

Gunn praised the city staff and said that despite the recent challenges, the city passed a budget that reduced the millage rate for the first time in ten years and received all-time high approval ratings from residents and business owners. “In the contract, I ask for fair compensation which is commensurate with surrounding communities, my 20 years of experience in public service, and the responsibilities and duties of this position,” she added.

Commissioner Marlon Bolton asked if the attorneys and human resources department had benchmarked the \$225,000 that **Gunn** is asking for as salary with other cities around Tamarac. Carmen Rodriguez, **Gunn’s** attorney, considers her client’s request modest compared to the previous city manager’s salary, or the \$264,000 the city manager of Coconut Creek earns. The city manager of neighboring Coral Springs makes \$279,000. Lorenzo Cahoon, director of human resources, said when Cernech was promoted to city manager in 2011, he was offered a \$202,000 salary. “If you put that number in perspective with a ten-year inflation, **Gunn** is asking for a modest salary,” he said.

Commission members had a lot of questions about benefits, car and phone allowance, travel expenses, and vacation time – all items that had significantly added to the Cernech income when he was a city manager. After two hours of back and forth, the commission returned the contract for further work to city attorney John Herin and **Gunn’s** attorney Rodrigues. They will be changing the wording to include additional performance standards for the position and outline a 90-day mutual termination agreement.

Before she was hired as assistant city manager in 2017, **Gunn** worked for the City of Miramar from 2014 to 2017 and the City of Fort Lauderdale from 2004 to 2011, in the same role.

Internet – Newspaper Archives Searches

Kathleen Gunn

(Articles are in reverse chronological order)

Gunn graduated from Pace University in New York with a bachelor of arts in political science and government and a master's in public administration. She also earned her master's in pastoral ministries from St. Thomas University. Her employment agreement and compensation package will be presented again and voted on at the commission meeting on November 10.

Internet – Newspaper Archives Searches Kathleen Gunn

(Articles are in reverse chronological order)

Tamarac Post (FL)
August 19, 2020

Tamarac is Poised for the Future: Marlon Bolton Interviews Tamarac Assistant City Manager Kathleen Gunn

Author: *Dawne Richards*

Recently, as part of his “Unscripted” video series, Tamarac Vice-Mayor Marlon Bolton sat down for a lively and informative conversation with **Kathleen Gunn**, Tamarac’s Assistant City Manager. The City Manager’s office is responsible for the day-to-day operations of Tamarac, ensuring that all the things the residents, businesses and visitors expect from the city get done.

As **Kathleen** puts it, “The City Manager is like the CEO, and the mayor and commission are like the board of a private corporation.... Our office does everything we can to ensure that the wishes of the Mayor and Commission are implemented.”

Her office has some discretion as to implementation details of the city’s vision, while they pay close attention to the work of the various city departments, from social services, police/fire, emergency preparedness and more – in short, “anything and everything that residents and businesses will see and care about.”

Tamarac 2040

Kathleen is excited about Tamarac’s strategic plan, Tamarac 2040, and believes that the city is poised for the future. You can find more details about the Tamarac 2040 here: <https://www.tamarac.org/141/Strategic-Planning>

The strategic plan includes six overarching goals:

1. Tamarac is Home
2. Tamarac is Safe and People Know It
3. Tamarac is Economically Resilient
4. Tamarac is Vibrant
5. Tamarac is Smart and Connected
6. Tamarac is a Dynamic Workplace

The office also regularly surveys community members; currently, public safety is the #1 concern. “We want to ensure that we have an unparalleled quality of life. We hear from the community and Commission about things that are happening, and our job is to implement them, make sure it’s going well, and if not, take steps to address,” **Kathleen** continued.

“You are to live in Tamarac for the rest of your life”

Vice-Mayor Bolton remembered a recent conversation with his young son; he told him, “You are to live in Tamarac for the rest of your life... we had a conversation about how we’re planning for 2040; he’ll be 26 when we finish the vision we’re talking about now. It’s not about us; it’s about the future.”

Internet – Newspaper Archives Searches**Kathleen Gunn***(Articles are in reverse chronological order)*

Navigating the Ever-Shifting Landscape

Asked about her role during the COVID-19 pandemic, and how she has navigated through the past several months and how the organization and work has shifted, **Kathleen** is understandably proud of how the city has navigated, and continues to navigate, the ever-shifting landscape:

“Everything has shifted and there’s a lot we still have to do no matter what. In some areas, the means of delivery has shifted. In others, it hasn’t. The city has been open this entire time; we’re a 24/7 operation. We did close City Hall to the public in order to keep the public and our employees safe. Overnight, we had 40% of our workforce telecommuting, which posed unique challenges, but it speaks to our being well-prepared to be a smart city.”

Departments Working Together for Tamarac

For example, in an abundance of caution, every single call EMS goes on is now treated as a potential COVID call; the city secured the additional Personal Protective Equipment needed for first responders. The city’s Fire Chief is, **Kathleen** notes, “our Emergency Manager, in essence; he has been on daily calls with county and state leaders to ensure we are in sync with what everyone is doing and doing everything we can to protect our residents....We regularly evaluate the executive orders from the county, state and federal government to ensure our residents and businesses know what’s required as things continue to evolve, and are in the best position to rise to the challenge.”

Economic Implications

Recognizing that there are many economic implications for Tamarac’s residents and businesses, the City Manager’s office is continuing to work tirelessly to “get out timely and accurate information, and do whatever we can to support businesses and residents in minimizing the hardships the pandemic has caused.”

As to the federal CARES act and stimulus funds, **Kathleen** reminded everyone that “The federal government is pumping money into the economy; we’ve gotten some direct allocations but we’re also working to make sure that we are maximizing the amount of aid we get to offset extra costs the city has incurred.” During this budget preparation season, the city is also keeping an eye on legislation to make sure that Tamarac receives any available assistance.

After the Pandemic

Vice-Mayor Bolton noted, “A lot of people are wondering how we will recover; what does Tamarac look like after this pandemic?” “That’s the million-dollar question,” according to **Kathleen**. “A lot of this is unfolding; we’re not out of the woods yet.... We still don’t know the full economic fallout, but we have emergency plans and now we have pandemic responses, so we will be ahead of the curve on safety. [This has proven] the importance of investing in technology and the infrastructure that supports it,” adding that we can’t underestimate how impressive it is “that we went to teleworking literally overnight without missing a beat.”

The City Manager’s office is also “keeping an eye out in the larger business community and how it will impact the landscape in Tamarac, and putting ourselves in the best possible position for the future....We are committed and standing at the ready to take advantage of every possible

Internet – Newspaper Archives Searches

Kathleen Gunn

(Articles are in reverse chronological order)

opportunity that we can.” Vice-Mayor Bolton reminds everyone in Tamarac that “Even though City Hall is closed to the public, we are still here and working extremely hard for the residents and for the future.”

**Internet – Newspaper Archives Searches
Kathleen Gunn***(Articles are in reverse chronological order)*

Sun Sentinel (FL)
November 26, 2018

Aging Tamarac shopping center may be replaced with rental apartments

Author: *Lisa J. Huriash*

What remains of an aging Tamarac shopping center that once housed the city's first library could be razed to make way for rental apartments. Coconut Grove-based EDEN Multifamily LLC is proposing 212 units and an outdoor pool at the northeast corner of West McNab Road and North Pine Island Road, in a project known as EDEN West. EDEN Multifamily would like to see construction begin in 2019, according to its website.

Tamarac Assistant City Manager **Kathleen Gunn** said the developer is expected to meet with nearby homeowners on Nov. 27 before the project goes before the city's Development Review Committee. According to paperwork submitted to City Hall, the site plan proposes:

- 31 studio apartments
- 65, one-bedroom units
- 86, two-bedroom units
- 30, three-bedroom units

The units would range from 586-square-foot studios to 1,388-square-foot, three-bedroom units. There will be two, four-story buildings of apartments. One of the buildings will include a leasing office and amenities. The development would be on a 6-acre site, which included the Colony West Shopping Plaza and a three-story office building that formerly housed a First Union National Bank, said **Gunn**. Much of the plaza was demolished in 2016 in a deal with the city.

The shopping mall is best known as the former site of the city's first library, which operated for decades. According to the Tamarac Historical Society, the library opened in December 1977 with 10,000 books. In its time, it was the busiest branch library in Broward County. Crowds at the Tamarac library were so thick in the mid-1990s that a county commissioner likened visiting the branch to a contact sport. But in 2004, the branch at 8601 W. McNab Road was closed as part of a consolidation effort by Broward County libraries. The plaza never fully recovered.

Internet – Newspaper Archives Searches
Kathleen Gunn

(Articles are in reverse chronological order)

Sun Sentinel (Fort Lauderdale, FL)
December 31, 2015

Ex-employee sues Miramar, says she was fired for her honesty - Allegedly asked to give false numbers

Author/Byline: Brian Ballou

A former Miramar employee has sued the city for wrongful termination claiming she was fired because she refused to go along with her supervisor's demands that she falsify their department's budget report. The lawsuit was filed in U.S. District Court in Fort Lauderdale on Tuesday, five days after the city notified Merlene Patrice Bourdeau-Quispe that it had conducted an investigation into her complaint and decided not to rehire her.

Bourdeau-Quispe worked for the city for 14 years before she was fired in July from her position as fiscal operations manager in the Department of Cultural Affairs. The suit alleges her firing was retaliatory and violated the state's Whistle-blower's Act. Miramar City Attorney Jamie Cole didn't immediately respond Wednesday to requests for comment on the lawsuit.

Bourdeau-Quispe's suit claims she was asked by her boss, Valerie Gammon, to provide false numbers to back up misleading internal audits, budget projections and other reports within the department. Bourdeau-Quispe said that when she replied that she would only report true amounts, Gammon chastised her for being "too transparent," according to the lawsuit. The suit also says Gammon ordered Bourdeau-Quispe to perform other duties that undermined "generally accepted accounting procedures." The suit says Bourdeau-Quispe provided Gammon with an accurate budget in May, but Gammon ordered her and another employee to create an alternate budget. Bourdeau-Quispe said she refused and that Gammon berated her.

The suit also names assistant city manager **Kathleen Gunn** and human resources director Sam Hines as defendants because they oversee terminations. According to the lawsuit, Bourdeau-Quispe was fired on July 2, and later in the month, and again in August, she requested reinstatement.

On Aug. 31, she filed a formal complaint with the city, but on Dec. 24, the city informed her that she would not be rehired. Bourdeau-Quispe is seeking reinstatement of her job, lost wages and benefits and compensatory damages.

Internet – Newspaper Archives Searches
Kathleen Gunn

(Articles are in reverse chronological order)

Sun Sentinel (FL)
April 19, 2011

Another high-level departure comes at Fort Lauderdale city hall

Author: *Scott Wyman*

With a decision looming on a new city manager, another member of George Gretsas' inner circle is departing from Fort Lauderdale City Hall. **Kathleen Gunn** submitted her resignation last week. She had been an assistant to Gretsas, including director of grants and legislative affairs, and has been filling in as acting assistant city manager in the wake of other departures.

Gunn arrived in 2004 from White Plains, N.Y., where Gretsas knew her as executive director of the White Plains Business Improvement District. Gretsas had been executive director of the of the mayor's office in White Plains before coming to Fort Lauderdale. **Gunn's** resignation is effective June 1 and follows resignations be David Hebert and Ted Lawson, both assistant managers under Gretsas and both also individuals who followed him here.

A search committee has narrowed a field of applicants to three finalists for city commissioners to consider for city manager. The job has been open since Gretsas' contract expired last summer. The commission will interview the three finalists Wednesday and hope to have a new manager on board by June.

Internet – Newspaper Archives Searches
Kathleen Gunn*(Articles are in reverse chronological order)*

Sun Sentinel (FL)
November 23, 2009

Job-Contract-Gate in Fort Lauderdale: What's the truth?

Author: *Brittany Wallman*

During last week's hot debate about City Manager George Gretsas, Fort Lauderdale City Commissioner Charlotte Rodstrom whipped out a stack of 18 job contracts of top managers in City Hall, like a smoking gun. Rodstrom said that when Gretsas arrived, there were far fewer department heads. He reorganized city staff to make many of the division managers department heads instead, reporting directly to him. And he gave them job contracts with severance pay if they're fired. "I find it despicable," Rodstrom said. If Gretsas were to leave, she said, "he could go ahead and fire these 18 people, and we as a city are crippled by the amount of severance packages that we're going to have to pay for them. ... It's wrong," she charged.

I paid about \$25 for copies of the contracts. Here's an example: **Kathleen Gunn**, recruited here from New York by Gretsas, has a contract dated Jan. 5, 2009, that lasts two years. She's an "assistant to the city manager." She can be suspended for just cause, with or without pay, if she is found to have committed serious job-related misconduct or is convicted of a felony. Otherwise, she's good. If someone wants to fire her, she gets 90 days of notice, and leaves with a lump sum equal to three months of salary and benefits.

I'll give you the full list of employees with contracts, on the jump. Chaz Adams, the city spokesman, said the contract concept is not new to Fort Lauderdale City Hall, though the number of employees with contracts was expanded under Gretsas. The jobs do not have civil service protection and are not union jobs, he said. So to mitigate the risk of stepping away from that protection, the employees are offered contracts. With the contracts, said Adams, comes "accountability, and responsibility."

Mayor Jack Seiler said he was alarmed to learn of the contracts, and wants commissioners to discuss whether they should be brought to elected officials for approval in the future. Currently, they city manager alone can approve them. For the record, I only got 17 contracts from the city, plus the contracts for the four who report to the City Commission: clerk, auditor, manager and attorney. There is no permanent fire chief right now, so perhaps that's the missing contract.

Employees with job contracts, and the date and duration of their contracts:

Kathleen Gunn, assistant to the city manager, two years starting Jan. 5, 2009

Ted Lawson, assistant city manager, two years starting Jan. 5, 2009

Frank Adderley, police chief, two years starting May 30, 2008. (NOTE: Vice Mayor Bruce Roberts also was on a contract when he was chief, Adams said.)

Valerie Bohlander, director of building department, two years starting Oct. 4, 2008

Kirk Buffington, director of procurement services, two years starting Oct. 4, 2008

Albert J. Carbon III, director of public works, two years starting Nov. 15, 2008

Averill Dorsett, director of human resources, two years starting Dec. 5, 2008

Internet – Newspaper Archives Searches
Kathleen Gunn*(Articles are in reverse chronological order)*

Timothy Edkin, director of information technology services, two years starting Oct. 4, 2008
Phillip Thornburg, director of parks and recreation, two years starting Oct. 25, 2008
Stephen Scott, director of economic development, two years starting Jan. 5, 2009
Catherine McCaffrey, director of business enterprises, two years starting June 25, 2009
Allyson Love, assistant city manager, two years starting Jan. 5, 2009
Michael Kinneer, director of finance, two years starting July, 2008
David Hebert, assistant city manager, two years starting Jan. 19, 2008
Gregory Brewton, director of planning and zoning, two years starting Dec. 24, 2007
Robert Bates, director of office of professional standards, two years starting Oct. 1, 2008
Diana Alarcon, director of parking and fleet services, two years starting Dec. 22, 2008

**Internet – Newspaper Archives Searches
Kathleen Gunn**

(Articles are in reverse chronological order)

Sun Sentinel (Fort Lauderdale, FL)
July 31, 2009

FORT LAUDERDALE GUNNING FOR FEDERAL DOLLARS

Author/Byline: Posted by Brittany Wallman

If you want to know Fort Lauderdale's plans to get a piece of the American Recovery and Reinvestment Act of 2009, [click here](#).

Fort Lauderdale's **Kathleen Gunn** is in charge of the effort. She's a former assistant city manager. Now she's director of grants and legislative affairs.

The city already got a chunk of money to hire a dozen police officers.

Internet – Newspaper Archives Searches

Kathleen Gunn

(Articles are in reverse chronological order)

Sun Sentinel (Fort Lauderdale, FL)

February 9, 2009

KLEIN HELPS LOCAL MAYORS LOBBY FOR STIMULUS FUNDS

Author/Byline: William Gibson

South Florida Congressman Ron Klein today met with more than a dozen Broward County mayors and city managers to discuss the economic-stimulus package and push for local funding.

Ron Klein "I look forward to continuing to work with the mayors and other local officials to address their primary concern: that stimulus money is spent creating jobs and funding local priorities right here in South Florida," Klein said afterward.

If the House and Senate complete action on the bill this week, billions will go to the states and federal agencies to dole out to communities. That's when the really intense lobbying begins. Klein, a Democrat from Boca Raton, will hold a similar meeting with Palm Beach County mayors on February 18.

His office said participants in this morning's Broward County meeting included:

Hillsboro Beach Mayor Carmen McGarry, Oakland Park Mayor Layne Walls, Oakland Park City Manager John Stunson, Lighthouse Point Mayor Fred Schorr, Dania Beach Mayor Al Jones, Dania Beach City Manager Colin Donnelly, Fort Lauderdale Grants Manager **Kathleen Gunn**, Pompano Beach Mayor Lamar Fisher, Coral Springs Mayor Scott Brook, Plantation Mayor Rae Carol Armstrong, Wilton Manors Mayor Gary Resnick, Lauderdale-by-the-Sea Mayor Roseann Minnet and Cooper City Mayor Debbie Eisinger.

Internet – Newspaper Archives Searches
Kathleen Gunn

(Articles are in reverse chronological order)

Sun Sentinel (FL)
January 1, 2009

Lauderdale shuffles staff

Author: *Brittany Wallman*

Fort Lauderdale City Manager George Gretsas shook up his management team over the holidays, shuffling two assistant city managers to lower jobs and appointing a new city spokesman, among other things. The new jobs take effect Monday.

Here's the new lineup:

Ted Lawson, moving from director of the public information department to assistant city manager overseeing operations.

Allyson Love, moving from director of management and budget to assistant city manager overseeing administration.

Kathleen Gunn, moving from assistant city manager to director of grants and legislative affairs.

Stephen Scott, moving from assistant city manager to director of economic development.

Diana Alarcon, moving from assistant parking service manager to director of parking and fleet services to replace the just-retired Director John Hoelzle.

Jeff Modarelli, moving from director of economic development to director of public information.

Scott and **Gunn** asked to be reassigned, for personal reasons, Lawson said. They will have cuts in pay. Pay raises are coming to Lawson, Alarcon and Love. Modarelli's pay will remain the same.

**Internet – Newspaper Archives Searches
Kathleen Gunn**

(Articles are in reverse chronological order)

Sun Sentinel (Fort Lauderdale, FL)
August 31, 2005

**LAUDERDALE POLICE CITE NEW TOP OFFICIALS - TRIO'S TRAFFIC TICKETS
CALLED COINCIDENCE**

Author/Byline: Brittany Wallman

Were they targeted by Fort Lauderdale police officers, or is it just a coincidence that in the past three months the city manager, his assistant manager and his spokesman all have been pulled over and issued traffic tickets? City Manager George Gretsas was the latest of the three to be accused of violating the rules of the road. He was ticketed last week, accused of running a stop sign in his east Fort Lauderdale neighborhood, officials confirmed Tuesday.

Since his arrival as city manager one year ago, Gretsas has taken a hard line with the Police Department and is set to decide this week whether to fire a police officer accused of threatening a youth in a courtroom and then lying to investigators. Gretsas has kept a close eye on the department, demanding that an increase in violent crimes be reversed. The city commissioned a study that this year blamed Police Chief Bruce Roberts, who was put on notice last month by Gretsas to improve the department. Gretsas said he'd "rather not comment" yet on the traffic tickets and hasn't decided whether to fight his. "I have reason to believe he knew who I was," Gretsas said of the officer who pulled him over on the afternoon of Aug. 24. "I don't know whether he knew it beforehand or not."

In every instance, Gretsas, Assistant City Manager **Kathleen Gunn** and Public Information Officer David Hebert were driving their personal vehicles and were on their way to or from work. All three moved from White Plains, N.Y., and they knew each other there before coming to Fort Lauderdale in the past year. Records indicate they have no other local tickets.

Police officials said it was nothing but a coincidence. "I'm sure George told you he thought it was a conspiracy," said Fraternal Order of Police President Jack Lokeinsky. "The message from me has not been to get any city employee, whether it's Gretsas or anybody. I'm not like that."

Meanwhile, as Gretsas and his assistants pondered the timing of their tickets, police officers were given their own coincidence to consider. The same day Gretsas was ticketed, officers learned in a department e-mail that Hebert had been temporarily transferred from the City Manager's Office to work as a top assistant to the police chief.

Gretsas said he did not transfer Hebert because of the ticket. He said Hebert's move had been planned previously and was intended to help the police chief develop a crime-reduction strategy and bridge a gap between City Hall and the Police Department.

Lokeinsky said that the assistant's job is typically held by a high-ranking officer. He said police officers have questioned whether "City Hall has now planted their spy."

Internet – Newspaper Archives Searches**Kathleen Gunn***(Articles are in reverse chronological order)*

Police spokesman Sgt. Andy Pallen noted that the three tickets were issued by different officers. Gretsas' ticket, he said, was the result of a complaint about drivers running a stop sign at Ocean and Mayan drives, and the city manager was one of about 20 cited.

Hebert was accused by city police on July 20 of driving 60 mph in a 25-mph zone near Sunrise Boulevard and the FEC railroad tracks, court records show. He also was ticketed for making an unsafe right turn on red and disobeying a stop sign. Hebert has declined to comment on whether he deserved the tickets. He said he was driving home from a late City Commission meeting and had an unfriendly run-in with the officer, whose spotlight blinded him while he was being ticketed. "[The officer] expressed concern that he needed his floodlight on for concern for his safety," Hebert said.

Gunn was ticketed on May 16, accused of driving 43 mph in a 30-mph zone on Third Avenue not far from City Hall, court records show. She paid \$142.50 for the violation and pleaded no contest, agreeing to attend driving school, court records show. **Gunn** was on vacation and couldn't be reached for comment.

**Internet – Newspaper Archives Searches
Kathleen Gunn***(Articles are in reverse chronological order)*

Miami Herald, The (FL)
August 9, 2005

CITY CALLS OFF TRIP TO RECRUIT DETROIT COPS

Author/Byline: Wanda DeMarzo

Detroit, one of the nation's most violent cities, plans to lay off nearly 600 cops by the end of the month. The Fort Lauderdale Police Department needs to fill 25 vacancies, and is feeling pressure to hire more cops to help quell a rise in violent crime. So it seemed like the perfect solution, or at least that's what Fort Lauderdale's human resources and police departments thought.

But just weeks before a team of civilians and officers was to fly to Detroit to interview nearly 70 applicants who had passed the pre-screening requirements, Fort Lauderdale's assistant city manager, **Kathleen Gunn**, put the trip on hold. A city spokesman said the city didn't receive enough applications to merit the trip.

The city wanted at least 75 applications and had only received 50 by the end of July. City officials said they had processed another 20 in the first week of August. Not good enough, they decided. "We just didn't get the response we wanted. There may be a greater incentive for those officers, once they don't have a job, to follow through with the application process," said Fort Lauderdale spokesman David Hébert. "We thought it would be better to wait until the pink slips were given out." But once an applicant is approved and hired, it can take anywhere from five months to a year for the officer to be recertified and trained, depending on the person's past law enforcement experience. Fort Lauderdale was hoping, by hiring experienced officers, to cut the amount of time needed to get them on the street.

Fort Lauderdale hasn't focused only on Detroit. The department has advertised in law enforcement periodicals, on the Web and at colleges, universities and military training centers, officials said. Fort Lauderdale Police Chief Bruce Roberts, who is under the gun because of the rise in violent crime over the past year, has promised city officials he will work to cut the crime rate at least 3 percent over the next six months. The city reported an 18 percent increase in violent crime, which includes homicide, robbery and aggravated and sexual assault, from the first six months of 2004 to the same time period this year.

Roberts' supporters say budget restraints over the last several years have crippled the department. The past two years, the department has been under a hiring freeze. "The city has been devastated over the last few years because of budget cuts, and the filling of vacancies isn't going to happen overnight," said former Fort Lauderdale police chief Joe Gerwens. "The problem won't be solved in the short term; it's going to take a long time."

Officers say there aren't enough local job candidates to fill the positions. "We're having to stretch to find the right people to fill the empty positions we have," said Fort Lauderdale field training officer Sgt. Greg Kridos. Agencies from cities all over the country - Atlanta, Denver and Dallas are a few - have been traveling to Detroit to interview prospective applicants.

Internet – Newspaper Archives Searches**Kathleen Gunn***(Articles are in reverse chronological order)*

Some of the departments are even paying for prospective applicants to fly to their cities. "Our officers have to go where the opportunities are," said Detroit Officer Marty Bandemer, president of the Detroit Police Officers Union. "We are ranked as the most violent city in the country, and our officers have seen and dealt with all kinds of calls. Our officers are highly trained, motivated, dedicated and no stranger to criminal activity." Fort Lauderdale is not the only city showing spikes in violent crimes.

Several east Broward cities patrolled by the Broward Sheriff's Office reported an increase in violent crime for the first six months of this year. Oakland Park, Pompano Beach and Deerfield Beach reported increases ranging from 11 to 28 percent. "There seems to be a slight increase in crimes across the county and the country," said BSO spokesman Jim Lejedal. "But we expected a slight increase and we are still safer here than we were a few years ago."

**Internet – Newspaper Archives Searches
Kathleen Gunn***(Articles are in reverse chronological order)*

Sun Sentinel (Fort Lauderdale, FL)
July 3, 2005

90 LOBBYISTS REGISTER WITH CITY CLERK - POWER BROKERS MAKE THEIR CASES WITH OFFICIALS IN FORT LAUDERDALE

Author/Byline: Jean-Paul Renaud

Lobbyists are alive and well in this city. Who represents the rich and powerful -- and tries to influence public officials in Fort Lauderdale -- is no longer a mystery because of a law commissioners passed five years ago that requires lobbyists to register with the city clerk's office. In total, about 90 lobbyists registered with the city since 2004. Here are this year's top behind-the-scenes power brokers, according to city records:

The lobbyist who represented the most clients, documents indicate, was Robert Lochrie, son of former Sun Bank vice chairman Robert "Buddy" Lochrie. Since 2004, records show, Lochrie, an attorney for Ruden, McClosky, Smith, Schuster & Russell, has represented about 60 clients in City Hall, mostly developers.

Coming in second is Nectaria Chakas, also an attorney for Ruden, McClosky. Her list of clients, about 40 of them, covers four pages on the city's 22-page list of registered lobbyists. Third on the list is Donald R. Hall of the law firm of Gunster, Yoakley & Stewart, with 19 clients.

The city also requires that lobbyists file reports for the expenses they incurred in their attempts to influence city commissioners. In 2001, those reports sparked a city investigation after a company seeking a multimillion-dollar contract took city staff to lunches and dinners.

The city's employees were cleared of wrongdoing, but new measures were drafted that forbade staff to accept dinners from companies seeking to do business with the city.

City Manager George Gretsas, who arrived in late 2004, implemented an even stricter policy when it comes to accepting gifts. "We can't do anything; it's a zero tolerance policy," said **Kathleen Gunn**, assistant city manager.

Between 2003 and 2004, only one lobbyist spent money trying to persuade a city official, according to city records. Michael Milberg, of Big Dog Ventures, took Commissioner Carlton Moore out for a \$30 breakfast, documents show. Records do not indicate what Milberg wanted from the meeting.

Internet – Newspaper Archives Searches

Kathleen Gunn

(Articles are in reverse chronological order)

Sun Sentinel (FL)

August 22, 2004

Assistant Manager is hired, city says

Author: *Brittany Wallman*

Just days after ousting the assistant city manager, Fort Lauderdale City Manager George Gretsas has hired a replacement from White Plains, N.Y. **Kathleen Gunn**, who worked as executive director of the White Plains Business Improvement District, has signed a contract to be Fort Lauderdale's assistant city manager, Gretsas confirmed Saturday. Gretsas terminated Assistant City Manager Bud Bentley on Monday.

Gretsas said he'd hoped to announce the hire on Monday, when he also will announce a replacement for Cecelia Hollar. Hollar recently resigned as the city's construction services director. Gretsas plans to unveil a reorganization of City Hall later in the week.

Gunn is the second person Gretsas brings from his past to City Hall. Gretsas hired **Gunn** as a policy specialist in the White Plains mayor's office, where he was executive officer. The Business Improvement District is akin to Fort Lauderdale's Downtown Development Authority -- an independent entity that works with city government.

Gretsas, who started here Aug. 2, earlier announced the hiring of Bob Bates, a Marco Island lawyer who served with Gretsas on a New Jersey school board years ago. Bates will run the Office of Professional Standards, where employees file complaints of unfair treatment.

Gunn has a master's degree in public administration but has never been an assistant city manager, Gretsas said. Gretsas said **Gunn** is "energetic" and "knows government very well." She'll start in early October, earning \$124,000 -- a leap from her salary in White Plains in the "\$70,000s range," Gretsas said.

Internet – Newspaper Archives Searches
Kathleen Gunn

(Articles are in reverse chronological order)

The New York Times (NY)
April 14, 2002

In Business; White Plains Business Group Appoints a New Director

Author: *Elsa Brenner*

The White Plains Downtown Business Improvement District has appointed a new executive director, **Kathleen Gunn**, formerly an economic development policy specialist for the city. **Ms. Gunn** was also a grant manager for a nonprofit group and a district representative for Congresswoman Nita M. Lowey.

The private, nonprofit Business Improvement District -- whose members are downtown property owner -- works with the city administration to improve the commercial area bordered by Hamilton Avenue to the north, North Broadway to the east, Post Road to the west and Maple Avenue to the south. That area, which is known as the central business district of White Plains, had a commercial office vacancy rate of 22 percent at the end of February, according to figures from the Stamford, Conn., office of Insignia/ESG, the commercial real estate company; the rate was 14.8 percent in the county as a whole.

Research Compiled by: Amanda Dillabough
 Colin Baenziger & Associates



Section 6

C. Anthony Hammond

*Fernandina Beach
City Manager Candidate Report*

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Cover Letter and Resume

Charles A. Hammond
17115 SW 135th LN.
Archer, FL. 32618
252.370.3432

06/12/2023

Mayor Bradley Bean
Fernandina Beach City Commission
204 Ash Street
Fernandina Beach, Fl. 32034

Dear Mayor Bean and Search Committee:

The purpose of my letter is to let you know of my strong interest in returning to Fernandina Beach by applying for the City Manager's position!

I was born and raised in Fernandina Beach, after graduating from FBHS, I joined the United States Navy. I have been married for 53 years, have two children and three grandkids. While serving in the U. S. Navy I completed a Bachelor of Science Degree in Health Care Management and a Masters Degree in Public Administration, choosing the latter as my chosen career after leaving the Navy.

As you can see from the accompanying resume my experience and qualifications are exactly what my hometown of Fernandina Beach needs. As a Fernandina Beach Native, I feel my outstanding military background, 25 years municipal work experience and excellent educational credentials qualify me for the position. Some of my past accomplishments consist of:

- Maintained a consistent tax rate for 7 consecutive years and managed to increase both General and Enterprise Fund Balance.
- Successful in recruiting eight major businesses to the Town of Ahoskie. This increased the tax base of Real Property by \$17,845,890 and Personal Property by \$5,195,780. This increased the tax revenue of Real Property by \$135,626 and Personal Property by \$45,484.
- Initiated and completed a 333-acre annexation project, which increased the residential tax base by one third and the commercial tax base by at least 5% upon implementation.
- Worked with the community group to restore financial integrity to the water and sewer fund by designing an acreage and capacity fee schedule for new developments netting the city in excess of \$1,000,000 in revenue per year. The funds were utilized to maintain an aging critical water and sewer infrastructure.
- Secured Federal and State Funding for a \$17.5 million wastewater treatment system, \$1.275 million Police Station and a \$2 million Recreational Complex, \$1.8 million dollar state of the art Fire Station and completed a 110-acre land acquisition project for public park development, \$2.8 million sewer water reuse project, and a \$1.278 million library project.
- Secured an \$8.5 million in State and Federal funding to construct a sewer connection between Archer and Newberry, Florida which will be part of a regional system.
- Converted the entire meter reading system from radio-read system to fixed reducing man-

Section 6

hours from 3 weeks to 4 hours.

- Successfully negotiated contracts and served as Project Manager for post ice storms and hurricane recovery related issues and projects exceeding \$100,000, with a 100% recovery of State and Federal funds.

Salary History:

	Start	End
• North Topsail Beach	\$35,000	\$53,000
• Creedmoor	\$55,000	\$63,000
• Ahoskie	\$68,000	\$108,000
• Archer	\$84,500	\$105,040 (current)

I would appreciate the opportunity to talk with you in person concerning the City Manager position. I am available any time in the morning or afternoon, if you are agreeable, please have someone contact me and we can set up an appointment. I have enclosed my current resume and can provide any additional information as needed.

Respectfully

C. A. Hammond

Charles A. Hammond MPA, ICMA/CM

CHARLES A. HAMMOND, MPA, (ICMA/CM)
17115 SW 135th LN., ARCHER, FL. 32618
♦252.370.3432 Cell ♦charleshammond@hotmail.com E-mail

CURRENT RESUME 06/12/2023

Areas of Expertise

ICMA Credentialed Manager

22 Years City Manager Experience ♦ Budget Preparation ♦ Personnel and Human Resource Management ♦ Grant Writing ♦ 3.5 years Coastal Community Management ♦ Operations and Project Management ♦ Organizational Change and Development ♦ Water & Sewer Distribution/Management ♦ Street Construction and Maintenance ♦ Festival Organization ♦ Parks and Recreation ♦ Community and Economic Development ♦ City / Government Functions ♦ Board Level Presentations ♦ Police and Fire Enforcement ♦ Disaster Recovery ♦ Computer Savvy ♦ Total Quality Management (TQM).

PROFESSIONAL PROFILE

An accomplished professional with an exemplary record of management and administrative roles in BOTH Federal and Municipal Government. A strategic planner and visionary leader with a proven record of identifying and establishing programs to facilitate the healthy growth of a community. Recognized for developing initiatives to achieve and/or exceed board assigned goals and expectations. Excellent ability in managing employees, coupled with a team building and a proactive management approach. Proven consensus building, communication, and problem-resolution skills. Academic credentials include a Master's Degree in Public Administration.

Sampling of Accomplishments

- Successful in recruiting eight major businesses to the Town of Ahoskie. This increased the tax base of Real Property by \$17,845,890 and Personal Property by \$5,195,780. This increased the tax revenue of Real Property by \$135,626 and Personal Property by \$45,484.
 - Successfully developed and was awarded multiple State and Federal grants in excess of \$50 million for projects in four municipalities dealing with lake restoration, wastewater expansion, recreational complex development, municipal building development and infrastructure support and disaster recovery. The most recent is the design and construction of a wastewater system in Archer, Florida which will serve the entire community. Something Archer had been trying to accomplish for 20 years.
 - Worked with the Historical Commission to identify, create and register the Ahoskie Historical District and obtain listing in the State and Federal Register (458 buildings).
-

PROFESSIONAL EXPERIENCE

CITY MANAGER, ARCHER, FLORIDA, June 2018 to present (Population 1241)

Direct daily operations of a rural diversely populated Florida community. Manage 10 full-time employees and an annual budget of \$2 plus million dollar General and Enterprise Fund. The departments consist of Public Works/Water Department, Streets, Parks and Recreation, Finance, City Clerk, Utility Billing/Customer Service Representative.

Charles Hammond (MPA) – Page –2

TOWN MANAGER, AHOSKIE, NORTH CAROLINA, January 2005 to April 2017 (Population 5474)

Direct daily operations of a full-service rural North Carolina diversely populated community. Manage 72 full-time employees and an annual budget of \$7 plus million dollar General and Enterprise Fund. In charge of ten direct reports (Police Chief, Public Works Director, Wastewater Treatment Plant Supervisor, Parks and Recreation Director, Fire Chief, Zoning Official, Finance Director and Town Clerk, Accountant, Utility Billing and Customer Service Representative).

CITY MANAGER, CREEDMOOR, NORTH CAROLINA, January 2002 to July 2004 (Population 2452)

Direct daily operations of a full-service rural North Carolina diversely populated community, with a growth rate of eight subdivisions and 700+ new homes over a two-year period. Manage 37 full-time employees and an annual budget of \$3.5 million. In charge of nine direct reports (Police Chief, Public Works Director, Water Treatment Plant Supervisor, Code Enforcement Officer, Zoning Official, Finance Director, City Clerk, Accountant, Tax Collector/Utility Billing and Customer Service Representative).

TOWN MANAGER, NORTH TOPSAIL BEACH, NORTH CAROLINA, 1998 to 2001. Population: (Winter) 1,112 (Summer) 16,000.

Directed full service coastal community with a staff of 22 full time and three part time employees. Managed an annual budget of \$2.3 million. In charge of eight direct reports (Police Chief, Public Works Director, Fire Marshal, Code Enforcement Officer, Zoning Official/CAMA Officer, Finance Director, City Clerk, and Customer Service Representative). Supervised accounting, cash management, purchasing, and billing/collections programs. Developed and administered capital improvements plans, long range plans, and appropriate policies and procedures.

COMMAND MASTER CHIEF, MARINE FORCES ATLANTIC FLEET, NORFOLK, VIRGINIA 1996 to 1998

Direct supervision and training of 36+ senior medical personnel with indirect supervision and training of 4,000+ junior medical personnel assigned to provide 24-hour medical coverage for a 37,000 man and woman work force. Responsible for all career guidance, administrative, pay, leave, and training matters affecting their current and future assignments.

Accomplishments:

- Revitalized a Recreation Program that had been dormant for 10 years along with upgrading park facilities.
- Initiated and completed a 333-acre annexation project, which increased the residential and commercial tax base in Ahoskie, North Carolina.
- Worked with the community group to restore financial integrity to the water and sewer fund by designing an acreage and capacity fee schedule for new developments netting the city in excess of \$1 million in revenue per year. The funds will be utilized to maintain an aging critical water and sewer infrastructure.
- Secured Federal and State Funding for a \$17.5 million wastewater treatment system, \$1.275 million Police Station and a \$2 million Recreational Complex and completed a 110-acre land acquisition project for public park development, \$2.8 million sewer water reuse project, and a \$1.278 million library project.
- Secured a \$1.5 million State and Federal grant to assist in restoring Lake Rogers to its original pristine state.
- Secured \$974,000 grant for a fixed read meter system which reduced reading man-hours from 3

Charles Hammond (MPA) – Page –3

weeks to 4 hours.

- Negotiated contracts and served as Project Manager for post ice storms and hurricane recovery projects exceeding \$1 million dollars, with a 100% recovery of State and Federal funds.
- Restored morale and built a high-performance management team by restructuring and developing existing staff and streamlining various departments to increase accountability, reduce duplication of services, and develop greater inter-departmental cooperation as well as identified and captured additional revenue sources.

EDUCATION / TRAINING

Troy State University - Master's in Public Administration, 1993

Southern Illinois University - Bachelor of Science, Health Care Management, 1989

ICMA Credentialed Manager – since 2005

Institute of Government University of North Carolina Chapel Hill – PELA Graduate, Basic Municipal Administration, Governmental Accounting, and Zoning, Basic Public Personnel Administration, Effective Management, Introduction to Government Accounting, Municipal Administrative Course

Other Relevant Training - Grant Writing, Purchasing and Construction Contracting, Damage Assessment, Capital Improvement Plan, Dealing with Difficult Customers, Successful Records Management, North Carolina Labor Law, Water Supply Plan in North Carolina, Debris Management, North Carolina Emergency Management

MILITARY

United States Navy – Command Master Chief (E-9), Honorable Discharge
Navy Senior Enlisted Leadership Academy (Blue), 1987

PROFESSIONAL AFFILIATIONS

International City-County Managers Association (ICMA/CM) Credentialed Manager; Florida City County Managers Association, International Kiwanis Club, American Legion Post 102, Vietnam Veterans of America Post 225

Candidate Introduction

CHARLES ANTHONY HAMMOND

EDUCATION

Master of Public Administration, Troy State University, Alabama at Camp Lejeune, NC
Bachelor of Science, Health Care Management, Southern Illinois University at Carbondale
Extension, Camp Lejeune, NC
High School Graduate, Fernandina Beach, FL
ICMA Senior Leadership Academy, Gettysburg Virginia
Navy Senior Enlisted Leadership Academy, U. S. Naval Base, New Port, RI

EXPERIENCE

City Manager, Archer, FL	2018 – present
Town Manager, Ahoskie, NC	2005 – 2017
City Manager, Creedmoor, NC	2002 – 2004
Town Manager, North Topsail Beach, NC	1998 – 2001
Force Master Chief, U.S. Marine Corps Forces, Atlantic, Norfolk, VA	1996 – 1997
Command Master Chief, 2d Marine Division, Camp Lejeune, NC	1991 – 1996
Command Master Chief, Naval Hospital, Cherry Point, NC	1989 – 1991
United States Navy	1968 – 1998

BACKGROUND

Archer is located in Alachua County, 10 miles west of Gainesville on State Road 45 and intersected North to South by US Highway 27 and State Road 45. According to the United States Census Bureau, the city has a total area of 6.9 square miles.

Archer is a very diverse rural community that has a total population of 1,289 people, and a total business count of 35, the largest being Arnolds Construction Company and Alachua County School System. The total City of Archer workforce is 10 employees, 7 of which report directly to the City Manager, 5 in Public Works, 4 in Administration and 1 in Parks and Recreation. The Total 2022/2023 Budget was \$1,563,807, the General Fund Budget was \$1,062,992 and the Enterprise Fund Budget was \$500,815.

The three most significant issues facing the City of Archer are:

- Failing Septic Tanks. Because there was so much citizen concern and fear of the unknown (cost of system, additional cost of sewer bills), Archer has been struggling for over twenty years to replace failing septic tanks with a state-of-the-art sewer system which would stimulate growth and spur its economy. In 2019, Archer realized that participating in a Regional Sewer System with Newberry was a cost effective and efficient way to move forward. Grants have been obtained to cover the entire \$8.5 million

CHARLES ANTHONY HAMMOND

first phase which will deliver 175,000 mg per day of flow. The second phase is also being funded by grants and will be completed by the end of 2026 providing sewer to the entire city.

- City roadways. The city currently owns and maintains approximately 14 miles of roadways, 3 miles paved and 11 miles unpaved. On June 06, 2022, an assessment was performed by Kimley-Horn, an engineering firm, following the analysis, remediations and construction costs were prepared based on current unit prices and developed a roadway rehabilitation method for future budgeting and planning purposes.
- Downtown commercial redevelopment. While the Alachua County continues to have great success with recruitment of business in the unincorporated areas, Archer continues to struggle because of its lack of a viable sewer system. Because of that, Archer has established and passed a tax abatement ordinance which will benefit developers moving into Archer on taxes, road infrastructure and water and sewer systems.

GENERAL, MANAGEMENT STYLE AND EXPERIENCE

Archer (population 1,289) is the fourth smallest of nine municipalities in Alachua County and is home to a very diverse population with very engaged citizenship. Although Archer is not by any means an anchor of Alachua County, they take pride in offering services and amenities to its citizens and area residents that sometimes small communities cannot accomplish. Archer has the only municipal owned splash pad west of Interstate 75 and offers a first-class recreational program to its citizens which is run by a volunteer.

Ahoskie (population 5,474) on the other hand, was the largest municipality in Hertford County and provided full service, (police, fire, recreation, water, sewer, streets, administration, inspections, and code enforcement) to the citizens and also served as the hub of a Regional Sewer System which prided itself in processing its waste into reclaimed water.

I was born and raised in Fernandina Beach, after graduating from FBHS, I joined the United States Navy. While serving in the U.S. Navy I completed a Bachelor of Science Degree in Health Care Management and a Master's Degree in Public Administration, choosing the latter as my chosen career after leaving the Navy.

As a Fernandina Beach native my end goal has always been to return to Fernandina Beach as its City Manager and utilize my skills developed over the years to help in planning and managing growth and development based on input from the community and the direction of the City Commission. As you can see from some of my previous accomplishments listed below, my outstanding military background, 25 years municipal work experience and excellent educational credentials are exactly what my hometown of Fernandina Beach needs to lead it into the future.

- While in Ahoskie, maintained a consistent tax rate for 7 consecutive years and managed to increase both General and Enterprise Fund Balance.

CHARLES ANTHONY HAMMOND

- Successful in recruiting eight major businesses to the Town of Ahoskie. This increased the tax base of Real Property by \$17,845,890 and Personal Property by \$5,195,780. This increased the tax revenue of Real Property by \$135,626 and Personal Property by \$45,484.
- Initiated and completed a 333-acre annexation project in Ahoskie, which increased the residential tax base by one third and the commercial tax base by at least 5% upon implementation.
- While in Ahoskie, I secured Federal and State Funding for a \$17.5 million wastewater treatment system, \$1.275 million police station and a \$2 million recreational complex, \$1.8 million dollar state of the art fire station and completed a 110-acre land acquisition project for public park development, \$2.8 million sewer water reuse project, and a \$1.278 million library project.
- Secured an \$8.5 million in State and Federal funding to construct a sewer connection between Archer and Newberry, Florida which will be part of a regional system.
- Converted the entire meter reading system in Ahoskie from radio-read system to fixed reducing man-hours from 3 weeks to 4 hours.

A situational management style has for the most part been my style of leadership. The situational manager understands the pros and cons of various management styles, when each works best, and how to apply them to different team members such as those who operate with minimal input and those who need more guidance and oversight which might require a more autocratic style, but employ democratic leadership to name company values, employ coaching with new employees and use bureaucratic motivational tools with competitive workers.

Although each organization has its own dynamics, employees are employees. It is my belief that every employee wants to participate in meeting their organization's goals and wants to be recognized for their contribution. I believe my staff, both military and municipal, would describe me as a leader who provides them guidance, leadership, and direction towards set goals and objectives yet is open minded enough to listen to suggestions and proposals that might offer better solutions. As a leader I was able to occasionally step aside and let the team members take control, which in turn inspired creativity in staff by encouraging new ideas and innovations. It's important for employees to understand that their ideas are both heard and valued, as it can encourage loyalty to both the leader and the company. Other traits I believe they would describe me possessing are staff motivation, and clear and concise communication with conflict resolution.

I believe the elected officials I have worked with would say that I have exceptional interpersonal skills in that I work well with many different people of diverse backgrounds and opinions, and I possess diplomacy because I am able to deal with controversial or otherwise challenging problems. In addition, I am ethical, possess strong project management skills, the ability to delegate tasks to competent individuals, fiscal prudence, budgeting abilities and servant leadership.

CHARLES ANTHONY HAMMOND

My greatest strength is a strategic planner and visionary leader with a proven record of identifying and establishing programs to facilitate the healthy growth of a community. Recognized for developing initiatives to achieve and/or exceed board assigned goals and expectations. Excellent ability in managing employees, coupled with a team building and a proactive management approach. Proven consensus building, communication, and problem-resolution skills. Several projects involved stages from initial concept, to planning and design and final construction. Some of these projects were \$2.5 million state of the art Fire Station, a \$1.275 million state of the art police station, \$17.5 million wastewater treatment plant and a \$2 million recreational complex, all completed on time and within budget.

In terms of weaknesses, I recognize that at times I tend to overwork myself and not delegate enough. It is not that I have a lack of confidence in the staff, it is that I enjoy being involved in all aspects of a project. Sometimes this gets in the way of staff enthusiasm, and I have worked hard to control that weakness.

For performance measures, I tend to use three different methods. I rely on self-evaluation, how the staff feels that they have progressed towards the ultimate goal; secondly, I will use peer review to determine how much progress other staff feel has been made; and third and lastly, performance measurements from citizen input to determine how they feel about the progress.

I believe I am most proud of how much Archer has advanced towards its goal of establishing a sewer system since 2019. After evaluating their initial proposal of establishing its own wastewater treatment plant, and knowing the cost associated with the operation of one, I proposed an alternate solution which was to join Newberry and become part of a regional system. Not only was this more economical and cost effective for Archer and its citizens, but the state totally endorsed this project and has provided 100% funding for the first phase.

I have never had a regret at any of the municipalities I have been involved with, all the projects we started as a team were brought to fruition. If I had a regret, I believe it would be, not being able to see the wastewater treatment system in Archer come to fruition in 2026.

I have had to fire several individuals, in my career, for spouse abuse (documented by police report), drug abuse (documented by testing), lack of performance (well documented by evaluations), in each case it was handled as a professional manager should handle it. Providing the employee with the documentation to review, listening to their side, and based on all the facts making the appropriate decision. Although personal feelings aside, the decisions I made were in the best interest of the remaining staff and the city.

The challenges I see facing the new City Manager are:

- Invigorating the waterfront park project seeking more economic and cost effective to move this project to fruition.

CHARLES ANTHONY HAMMOND

- Ensuring the citizens of Fernandina Beach understand what a General Obligation Bond (GOB) is and its importance in projects like waterfront park, downtown revitalization and upgrades to the city's aging infrastructure and facilities.
- Looking for additional fund sources and working with Nassau County and the Tourist Development Commission to find a fair way to allocate funds to pay for increasing service demands.

During the first six months my efforts will involve:

- Develop professional relationships with city staff, as a new City Manager you want to form strong professional relationships with your employees, that's not to say there should be no personal aspect to your relationship – in fact, there should be. It's just a matter of proportion, as the vast majority of your conversations with your direct reports should be about work.
- Stay visible, being visible with your staff and the community is incredibly important, as the more visible you are, the more connected people will feel to you. Visit staff at work sites, visit business owners in their shops and citizens on the street. That will go a long way in building strong relationships with your staff and the citizens of Fernandina Beach.
- Clarify expectations with the City Commission, one oft-forgotten part of becoming a new City Manager is that you will have several new bosses as well. And while there's a lot of focus on clarifying expectations with your staff, it's equally important to clarify expectations with your new City Commission, understand what they expect out of you as the new City Manager and learn their goals and objectives and priorities.
- Continue to review and learn more about the City's codes, as well as reading previous minutes prior to my arrival, understand more about the current budget and prepare for the future budget workshops.
- Set expectations and establish group norms with the staff. Once you understand what the City Commissioner's goals are, it's time to clarify expectations with your staff and establish group norms.
- On the few occasions I have worked with the media, I have worked extremely well with them. My first exposure was while at North Topsail Beach during hurricane recovery operations. Part of my role as the City Manager is to serve as the public face of the local government. As the City Manager, I would routinely meet with members of the media to answer questions. If a crisis occurs, such as a natural disaster, at the City Commissioner's discretion the City Manager may hold a press conference and will work to help the town navigate the problem.

I do not anticipate anyone contacting the city with any background information that would cause embarrassment to the City of Fernandina Beach.

CHARLES ANTHONY HAMMOND

As my social media skills have been limited to my personal Facebook and Instagram pages, I would work with the city IT department to learn more efficient and effective ways to utilize social media.

I do not anticipate any community activist group that would contact the city with any information that would cause an embarrassment to the City of Fernandina Beach.

In my leisure time I take pleasure in coin collecting (Morgan Silver Dollars), fishing, hunting, golf and traveling.

SIX ADJECTIVES OR PHRASES I WOULD USE TO DESCRIBE MYSELF ARE:

- Ethical
- Transparency
- Decisive
- Accountable
- Trustworthy
- Visionary

REASON FOR DEPARTING CURRENT POSITION

I have never been one to move from job to job, when I am hired for a position and with a city my dedication is focused 100% on that job and that city. However, at my last two jobs, Ahoskie, and Archer, I expressed to the mayor and council my ultimate goal (and the only reason I would consider leaving) in my career was always to return to Fernandina Beach as its City Manager where I could give something back to the community that I grew up in and where my family history dates back to 1852. What more could a City Manager want in his career?

CURRENT/MOST RECENT SALARY

My current salary in Archer, Florida is \$108,000 per year which includes a \$450 per month car allowance. In addition to the above, on my anniversary month each year, I am allowed to sell back unused vacation days above 80 hours and at the end of each fiscal year I am allowed to sell back excess sick leave over 80 hours.

Section 6

CB&A Background Checks

**Background Check Summary for
CHARLES ANTHONY “TONY” HAMMOND**

Criminal Records Checks:

Nationwide Criminal Records Search	No Records Found
County	
Alachua County, FL	No Records Found
Hertford County, NC	No Records Found
State	
Florida	No Records Found
North Carolina	No Records Found

Civil Records Checks:

County	
Alachua County, FL	August 2022 – Small claims lawsuit filed against Mr. Hammond Status: Closed
	August 2021 – Small claims lawsuit filed against Mr. Hammond Status: Closed
	June 2021 – Small claims lawsuit filed against Mr. Hammond Status: Closed
	January 2021 – County civil lawsuit filed against Mr. Hammond Status: Open
	September 2019 – Small claims lawsuit filed against Mr. Hammond Status: Closed
	<i>*See letter of explanation for candidate explanation for records found</i>
Hertford County, NC	No Records Found
Federal	
Florida	No Records Found

**Background Check Summary for
CHARLES ANTHONY “TONY” HAMMOND**

North Carolina	March 2011 – Civil Rights lawsuit filed against Mr. Hammond in his capacity as Town Manager. October 2011, Terminated <i>*See letter of explanation for candidate explanation for records found</i>
Motor Vehicle Florida	August 2021 – Accident
Credit	Talk to Consultant
Personal Bankruptcy	December 1989 – Bankruptcy, Chapter 7 March 1990, Terminated <i>*See personal disclosure for candidate explanation for records found</i>
Sex Offender Registry	Not Listed
Education	Confirmed
Employment	Confirmed
Social Media	Nothing of Concern Found

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

**Background Check Summary for
CHARLES ANTHONY "TONY" HAMMOND
Personal Disclosure**

Personal Disclosure Questionnaire

Name of Applicant: _____

The following questions are designed so that we will be able to make full disclosure to our client concerning your background. Please answer them honestly. Cutting corners or misrepresenting your past will result in you being eliminated from all further searches conducted by this firm. We understand that frivolous charges are sometimes made and that charges do not mean you were guilty. We also understand that you may have been wronged and needed to seek compensation. The bottom line is that we want to be certain that our client is fully informed. If you have any questions, please contact us for clarification.

Please explain any yes answers on a separate sheet of paper.

1. Have you ever been charged or convicted of a felony?
Yes ☐ No ☒
2. Have you ever been accused of or have been involved in a domestic violence or abuse incident?
Yes ☐ No ☒
3. Have you ever declared bankruptcy or been an owner in a business that did so?
Yes ☒ No ☐ As best as I can remember, it was back in 1987 I believe, after a military transfer, my wife lost a \$45,000 per year job, and it took 12 months before she found another job.
4. Have you ever been the subject of a civil rights violation complaint that was investigated or resulted in a lawsuit?
Yes ☐ No ☒
5. Have you ever been the subject of a sexual harassment complaint that was investigated or resulted in a lawsuit?
Yes ☐ No ☒
6. Have you ever been charged with driving while intoxicated?
Yes ☐ No ☒
7. Have you ever sued a current or former employer?
Yes ☐ No ☒
8. Please list links to all your social media accounts (Facebook / Instagram / LinkedIn / Twitter, etc.) and your personal web page if you have one.
Facebook - Charles Anthony Hammond; Instagram - tonyhammond5; LinkedIn - Charles Anthony Hammond
9. Is there anything else in your background that, if made public, would cause you, our client or our firm embarrassment if it came to light through the press or any other mechanism?
Yes ☐ No ☒
10. Please provide a list of any lawsuits in which you are or have been a party either as plaintiff or defendant.

Attested to:


Signature of Applicant

Please email this form via PDF DOCUMENT to Monique@cb-asso.com or via fax to
(561) 621-5965 no later than 5:00 PM MST 07/17/2023.

(Note: Please be sure to sign the form with your actual signature if you are sending Fax or PDF Document)

**Background Check Summary for
CHARLES ANTHONY "TONY" HAMMOND
Letter of Explanation**

CHARLES A. HAMMOND
17115 SW 135th LN., Archer, FL. 32618
252-370-3432
charleshammond@hotmail.com
267-84-1517

Letter of Explanation
08/07/2023

Ms. Klein, please find attached the following explanation to your email dated 08/06/2023:

(1) North Carolina federal civil record (pages 3-4):

According to Chief Fitzhugh (the Chief at that time), David C. Jenkins-Bey was arrested by Officer Alvarado, one of the Ahoskie Drug Task Force Officers, and after being convicted, filed a 550 Prisoner Civil Rights Law Suit against Officer Alvarado, the Town of Ahoskie, (me being the Town Manager, I was listed), the Ahoskie Police Department, the Hertford County Sheriffs Department, the Hertford County District Attorneys Office and the Chairman, Hertford County Commissioners. The suit was filed on 03/30/2011 and terminated on 10/03/2011 with no award to Plaintiff.

(2) Alachua County civil records (pages 16-20):

When I left Ahoskie in March 2017, I had three mortgages in North Carolina I was paying on, my wife lived in one (\$1,478 p/m), my daughter and grandkids lived in one (\$1,528 p/m) (both in Jacksonville, NC) and in addition I had one in Ahoskie I was paying on (\$1,010 p/m) which finally sold in June 2019 plus my wife's car payment and my truck payment. I was out of work from March 2017 until June 2018 when I went to work as City Manager of Archer. During those months, my income consisted of my military retirement and my monthly social security plus what little I had I savings. Although I struggled to keep my bills up to date, the five larger payments took their toll on the smaller bills. After taking the position at Archer, I attempted to bring the other accounts current but could never seem to catch up. I did not want to file for bankruptcy, so I went into a contract with a group called Canyon Legal to assist me in negotiating payment plans with these accounts. Canyon Legal was responsible for contacting each creditor and setting up a payment schedule, however on several of the accounts they did not act quick enough, and court action was filed. Once the court records were filed and I forwarded them to Canyon Legal, they (Canyon Legal) negotiated payment plans with the companies. All the companies have entered into a payment plan, and most are concluded at this date!

Regards



Charles A. Hammond

CB&A Reference Notes

Reference Notes

Charles A. “Tony” Hammond

Kathy Penny – Vice Mayor, City of Archer, FL 352-317-0863

Ms. Penny has been on the Commission since 2021 and has worked with Mr. Hammond since. She is newer to the Board but has enjoyed working with him. He is easy to talk to, he answers their calls and responds to the emails. He attends all the meetings and shows up to work. He is involved in the community and attends the events, which is important to Ms. Penny.

Most employees have worked for the City for a long time and Mr. Hammond leads them well. He is always seeking grants and other initiatives to benefit the City. He has made good decisions for the community, particularly in relation to the projects that he was working on. His work has been commendable.

Mr. Hammond works well with the public. He personally checks in on the project sites. He organized the Fourth of July event and negotiated with the company who did their fireworks. He is trying to pull a parade together for the holidays. He is seeking grants to fix the roads.

A few people in the community ask many questions and Mr. Hammond always takes the time to respond to their questions. A resident made a complaint on Sunday and by the next meeting the issue was resolved. He can make decisions within a certain budget amount, without bringing it to the Commission, so he quickly takes care of any issues that are within his authority.

At conferences Mr. Hammond is quick to network and introduce himself to others. He brought back many ideas from conferences. Most of the time he is very quick to complete his work, but some tasks take more time due to the process that is required. When others seem stressed, Mr. Hammond never does. He is very comfortable in his role and has great experience to rely on.

Ms. Penny does not associate with Mr. Hammond outside of work, but she has not heard of anything in his conduct or background that would concern an employer. He cannot please everyone, but he tries to resolve issues as best he can.

Ms. Penny would hire Mr. Hammond as he is a great manager. He does what he is supposed to do and is easy to talk to. He is very approachable, and he always attends the meetings.

Words or phrases used to describe Tony Hammond:

- Works well with others,
- Good attitude,
- Does not become stressed,
- Good organizer,
- Very personable, and
- Prepared.

Reference Notes
Charles A. “Tony” Hammond

Strengths: Communication, personable, visible in the community, works well with everyone, responsive to the Commission and the residents.

Weaknesses: He could be more visible in the community, but he attends most events.

Fletcher Hope – Commissioner, City of Archer, FL 352-339-0080

Mr. Hope has known Mr. Hammond since 2017. Mr. Hope has been on the Commission since 2009. Mr. Hammond has performed well. He has a military background and can be a little autocratic at times, but he is very thorough and he follows through. He has done well for Archer.

Archer is a very lean, small community but they want to grow. Mr. Hammond was not afraid of the task at hand. They gave him the authority to reach out, and he found grant writers. They have had as many as ten open grants at once, which is very impressive considering their population and size. He also looked for other ways to help the community grow.

Mr. Hammond tries to set a target and then hit it. He can become a little frustrated if he must change course when he has planned a project all the way through. However, he follows the direction he is given. He maintains operations at a high level.

Mr. Hammond does his job well. He brings information to the Commission but is not out there beating the drum. However, he opted to live in city limits and his home is about two blocks from City Hall. He is close knit in the community. He really listens to residents when they have issues or concerns. Communication is one of Mr. Hammond’s strengths, particularly in emergency situations. He contacts each Commissioner to apprise them of the situation.

They had a grant sourcing opportunity to install a children’s splash pad at the park. They discussed potential issues and liabilities to be as prepared as possible, and then crafted solutions before moving forward. Once the pad opened, they faced some newfound problems in the first six months. He pulled the team together, the office staff as well as the public works staff, and then listened to feedback. He did a great job resolving the issues and putting guidelines together.

Their accounting administrative person is used to a government financial system rather than the profit and loss system that they have historically used. Mr. Hammond is in the process of implementing this new system. Some of the Commissioners have questioned why it has taken so long, but these types of transitions are a process. He is competent at completing assignments in a timely manner. He does face setbacks in Archer that he would not have in a larger city with more levels of staff. He responds well to stress, which could stem from his military background.

A homeless person set up multiple tents on a sidewalk and stayed for quite some time. Some of the residents provided him with food and shelter, while others felt that it was a safety hazard because they could no longer access the sidewalk. Mr. Hammond asked this person to go to a shelter in another community as Archer does not have one, but he refused. He was approachable

Reference Notes

Charles A. “Tony” Hammond

and not doing anything illegal, so the County Sheriff did not have the grounds to remove him. The situation almost reached a controversial level but, in the end, it resolved itself. The homeless person presumably went back home and abandoned all his stuff. Mr. Hammond cleared the sidewalk and is holding onto the items for a period of time in case he wants to claim them. The City is now looking at securing shelter resources because it would give them more authority to remove someone blocking a right of way if they do not accept services. Mr. Hammond’s handling of the situation was very respectable. He did not overstep as some managers would.

A few activists in the community want Mr. Hammond to march to their drum, and as they were previously on the Commission, they feel that they still act in that capacity. They become upset when he does not act immediately when they request something. Mr. Hammond handles it well. He remains calm and resolved, and he considers all the components before acting.

Mr. Hope would hire Mr. Hammond again for Archer and hates the thought of losing him. Mr. Hope wishes Mr. Hammond the best, though part of him hopes that he will stay in Archer.

Words or phrases used to describe Tony Hammond:

- Friendly,
- Approachable,
- Orderly,
- Predictable, and
- Calm.

Strengths: Efficiency, timeliness, consistency in behavior (not a wild card).

Weaknesses: Because of his military background he can be a bit headstrong at times. That said, he is in a difficult position. He works with five elected officials who all have the same power, but they all want to act like the Mayor. While Mr. Hammond has made good decisions when hiring staff, he can also be a little more lenient with them at times. He could improve on goal setting.

Iris Bailey – Mayor, City of Archer, FL 352-219-7232

Ms. Bailey has known Mr. Hammond since 2018. The scores that she gives on his performance evaluations are always close to perfect. He always responds when she has questions or needs something. He has been an excellent manager for Archer.

Mr. Hammond has made good hiring decisions both when hiring personnel and in general. He attends various Board and community meetings as well as community functions. He works very well with the public. A few residents are very difficult, but he has hung in there. He keeps everyone informed.

Reference Notes
Charles A. “Tony” Hammond

Mr. Hammond has led the team to bring sewer to the city. He was instrumental in working towards a partnership with a neighboring city and they are in the process of completing the deal.

In terms of finance, Mr. Archer does very well. He meets his deadlines and completes work quickly. He responds to stress well but sometimes receives pushback from the residents mentioned previously. He copies the elected officials when he responds to emails from these residents and his answers are perfect.

When Mr. Hammond first arrived, there was a fairly large controversy, but Ms. Bailey cannot recall the details and it calmed down after his arrival. Nothing in his conduct or background would concern a reasonable person.

Ms. Bailey would hire Mr. Hammond and she does not want him to leave Archer. He is a great manager. He has helped them come a long way in a short time.

Words or phrases used to describe Tony Hammond:

- Thoughtful,
- Efficient,
- Hard working,
- Connecting,
- Supportive, and
- Pleasant.

Strengths: Wealth of knowledge running the city, networks very well in the region, communicates well, responsive.

Weaknesses: He is not always able to hide his emotions.

Melvin Lauderdale – Resident, Archer, FL 352-316-1164

Mr. Lauderdale has known Mr. Hammond since 2018. He stays calm and never allows his emotions to spill over. He wears many different hats and has always been able to delegate responsibility and authority. He manages the utilities and handles all the negotiations with utilities, waste management, and agreements on items such as cell towers.

Currently Mr. Hammond is working on getting city sewer for Archer as part of a joint venture with Newberry. He has played an important part in the process and has always been actively involved. He is like an energizer bunny. He goes from one meeting to the next and switches topics without missing a beat.

Reference Notes

Charles A. “Tony” Hammond

When a decision has legal implications, Mr. Hammond discusses the matter with the attorney. His decisions are backed up by good research or by those who have expertise in the subject. He is very responsive.

Being very energetic, Mr. Hammond is very visible in the community. He attends Commission meetings and several board meetings including the Planning Board. He has worked with committees like the cemetery committee and the farmer’s market.

Every community has some constituents who will never be happy no matter what you do. Mr. Hammond can deflect and hold them at bay while he does what he needs to do. He continues to work with the Commission and other organizations. He does not take it personal, and he works well with them while always being prepared for their questions.

When Mr. Hammond has information that the Commission should know, he picks up the phone and calls them. He shares their philosophy about the community. The City had a population of 2,000 people 50 years ago and is now down to 1,200. He brought in some new businesses during his tenure, which brought jobs the community. They were not big industries, but every job helps. He is very supportive of the community and meets with perspective businessmen and those thinking about relocation. He is very involved.

Handling stress is one of Mr. Hammond’s strongest suits. He considers what questions will come up so that he is prepared with a response. He is so very well prepared that he can respond to unhappy residents and provide the information they request.

The City needs a new sewer system, but a small group of residents do not want growth or expansion. Mr. Hammond has moved the process along while keeping the ship upright and the bow pointed in the right direction. The only people who have a negative opinion of Mr. Hammond are the few members of the community who are never happy. However, they can be shown scientific data to disprove their statement and they continue to stand their ground.

Mr. Lauderdale would hire Mr. Hammond. He is a great manager and a nice person. While they disagree at times, it never escalates to a confrontation. It will be a loss to Archer when he leaves.

Words or phrases used to describe Tony Hammond:

- Honest,
- Does his due diligence,
- Asset to the community, and
- Looks 360 degrees at one time to see all perspectives.

Reference Notes
Charles A. “Tony” Hammond

Strengths: Very calm, energetic, involved, delegates well.

Weaknesses: A few times he has delegated to the staff, and they dropped the ball. He then had to clean up their mess. Perhaps he could check in more along the way to ensure that they are staying on track.

Dana Miller – Vice Mayor, City of Alachua, FL 386-206-6061

Ms. Miller has known Mr. Hammond since 2018. Alachua and Archer are in the same county, and they interact at league meetings and other regional events in this capacity. Also, Ms. Miller works for a private company that is a vendor for Archer and they work together in this regard.

Mr. Hammond does a great job for Archer. The City has taken leaps and bounds from when he was hired, you can see a world of difference. The staff are very fair and knowledgeable. The morale and culture really improved once he came on board.

The elected officials in Archer not only like Mr. Hammond but they also are very impressed with his work. He brought many improvements to Archer through grants and in other ways.

Mr. Hammond is always very responsive, and he makes good decisions. He has managed the finances well and has been very solution and decision oriented. He is always very calm and collected when they have worked together.

Ms. Miller is not aware of anything controversial that involves Mr. Hammond. She does not believe that anyone would disagree with the statements in her references.

Ms. Miller would hire Mr. Hammond if she had a position that fit his qualifications and skills. Whoever hires him will be very happy with his job performance.

Words or phrases used to describe Tony Hammond:

- Even keeled,
- Confident,
- Knowledgeable,
- Fair,
- Approachable, and
- Easy to work with.

Strengths: Did a great job, improved the morale and culture of the organization, very fair, very knowledgeable, well liked.

Weaknesses: None identified.

Reference Notes
Charles A. “Tony” Hammond

Marilyn Green – Commissioner, City of Archer, FL 352-443-0175

Ms. Green has interacted with Mr. Hammond since 2018, but they have worked more closely together since she was elected in 2022. While Ms. Green is newer to the Commission, she does feel that Mr. Hammond’s job performance has been good.

The City’s staff is excellent, Mr. Hammond makes good hiring decisions. He makes good decisions generally. He keeps the elected officials informed either by contacting them directly or through his assistant.

Mr. Hammond is visible in the community and none of the residents have complained about him or the way he responds to them. He has good financial skills, and he accomplishes his work in a timely manner. He handles stressful situations well from all Ms. Green has seen.

The water lines in the community are very old. When they break down, Mr. Hammond pulls the public works team together to address the issues. He is customer service oriented. 98 or 99% of the residents in Archer are very happy with Mr. Hammond, which is an extremely high number in this type of work. Also, the entire Commission seems to have a positive opinion of him.

Ms. Green would hire Mr. Hammond. He is a good manager and has been helpful to Ms. Green.

Words or phrases used to describe Tony Hammond:

- Easy to talk to,
- Easy to work with,
- Listens,
- Responsive, and
- Communicates well.

Strengths: Listens to the elected officials regarding the issues they see and then correcting any issues that are within his power to fix.

Weaknesses: None identified.

Bill Lewandowski – Resident, Archer, FL 304-283-3487

Mr. Lewandowski has known Mr. Hammond since 2018. Archer is a small town with limited resources. The largest controversy in the community is switching from well and septic to sewer. Mr. Hammond has been leading the initiative to bring sewer to the community. He has done well and has been very responsive. He handles himself well at Commission meetings and is always polite to the elected officials and the residents. Every community has residents who are upset at one thing or another, and he even works well with them.

Reference Notes
Charles A. “Tony” Hammond

While the elected body makes the decisions, Mr. Hammond brings them proposals and they generally agree with what he recommends. In the few instances that the Commission does not immediately support the proposal, Mr. Hammond can defend his recommendation because he does the research and considers the idea from every angle.

Mr. Hammond is visible at community meetings and events. When residents have an issue or a question, he is always on top of it. They worked together on a new ordinance for the local city owned cemetery. Mr. Lewandowski’s suggestions and revisions were considered in the process, which was appreciated.

During covid all the City employees became sick which was a challenge, but Mr. Hammond kept the City functioning. He also helped resolve an issue with the local fire station. The County provides fire service to the City and was planning to close the station in Archer which would have resulted in longer response times and higher insurance costs for residents. Mr. Hammond was able to successfully negotiate the retention of the station.

Citizens can attend workshops and provide input which Mr. Hammond always takes into account. He has never shown any anger at these meetings, even during the really long Commission meetings when others are tense and upset.

Mr. Hammond has not been involved in anything controversial on a personal or professional level. Mr. Lewandowski is not aware of anything in Mr. Hammonds past that would concern an employer. Anyone who has a negative opinion of Mr. Hammond took the opposing view on a particular project. That said, Commissioners make the decisions on projects, not Mr. Hammond.

Mr. Lewandowski would hire Mr. Hammond, he is a great manager.

Words or phrases used to describe Tony Hammond:

- Competent,
- Responsive, and
- Cordial.

Strengths: Really in-depth knowledge of managing the city, successful at attaining grants, bringing sewer to Archer.

Weaknesses: Mr. Hammond has always communicated well to those who work with him. However, the City could be better at keeping the community informed. Residents must attend Commission meetings to know what is happening. That said, the Commission may control the level of communication instead of Mr. Hammond.

Reference Notes

Charles A. “Tony” Hammond

Chuck Clemmons – Representative, State of Florida 352-538-4561

Mr. Clemmons has done some constituent work with Mr. Hammond starting around 2020. Prior to Mr. Hammond’s arrival, the city went through five managers in eight years. Mr. Hammond has been in place since 2018 which indicates his success as a manager.

Some residents complained directly to the state legislature and Mr. Clemmons reached out to Mr. Hammond. Turns out the resident had not told the whole story. Mr. Hammond did well in these interactions and is a good person. He was always very responsive.

At the few events they were at, Mr. Hammond was very diplomatic and had positive interactions with the public. A former Mayor who is the center of influence in a particular community complains a great deal. Mr. Hammond must balance the interests very delicately to keep the equilibrium and he does better than most managers.

Mr. Clemmons is not aware of any negatives related to Mr. Hammond, but their interactions were limited to dealing with constituent complaints and state matters.

Mr. Clemmons would entertain Mr. Hammond’s application for any position that he had the hiring authority for. Overall, he is a good person. Mr. Clemmon rates Mr. Hammond a solid 8.5 out of 10, and on his scale anything over 7 is really good.

Strengths: Works through problems to find win/win solutions, always amenable to finding options within the parameters of the law that work for both the constituents and the elected officials.

Weaknesses: None identified.

Stewart White – Former Wastewater Plant Supervisor, City of Ahoskie, NC 252-642-7411

Mr. White met Mr. Hammond in 2005. A community cannot go wrong by hiring Mr. Hammond. Many managers stockpile funds while the community does not have the services it needs. Mr. Hammond made good recommendations in terms of when to save and when to spend. The elected officials asked for and approved several projects, and Mr. Hammond implemented them. The town was growing, and everyone was excited by these projects.

Mr. Hammond sat in the dunking booth to help raise funds for the Heritage Day Festival. He held workshops with the Town Council, and they talked about purchases like a new ladder truck for the fire department. The Commission wanted it to happen, but they did not have the money to fund it. They asked Mr. Hammond to find the money and he did what he could. He works his hardest to make things happen that will benefit the community and the residents.

Reference Notes

Charles A. “Tony” Hammond

Mr. Hammond held staff meetings every week and he went over the budget with staff. He was a people person, and he had a good heart. He did more for the employees and the community than any other manager Ahoskie had. He was a good manager in addition to being a good employee. He really had the community and the people at heart. During his tenure he built a new wastewater treatment plant, a new police station, a new fire station, new council chambers, and a new recreation complex.

The Finance Director added a zero where it should not have been. Essentially, a Director was slated to have \$3,000 but the budget showed \$30,000. The Director spent the money even though they knew they were only supposed to have \$3,000. The money to cover these expenditures had to come out of the fund balance. The projects that the elected officials voted to implement also had to be funded and between the projects and the budget mistake, the fund balance dropped to around 12%. The elected officials then decided to separate Mr. Hammond from Ahoskie. After he left, they brought in a hatchet man who let many of the employees go. Mr. White was one year shy of achieving his pension and they let him go for no cause. The extra zero in the budget was not Mr. Hammond’s mistake, and his departure was a loss for Ahoskie.

Mr. White would hire Mr. Hammond and wishes him the best. He did a great job for Archer.

Words or phrases used to describe Tony Hammond:

- Hard worker,
- Good heart,
- People person,
- Cares about employees, and
- Excels at project management.

Strengths: Good manager, good person.

Weaknesses: None identified.

Prepared by: Lynelle Klein
Colin Baenziger & Associates

CB&A Internet Research

**Internet – Newspaper Archives Searches
Charles A. Hammond
(Articles are in reverse chronological order)**

CBS 4News (FL)
February 23, 2023

City of Archer awarded almost \$7 million for city improvements

Author: Kassidy Ebrahimi

ARCHER, Fla. — An award of \$6,837,254 in grant funding was given to the City of Archer to help restore and protect the environment and the city's economic development, according to a press release.

Charles A. "Tony" Hammond, the city manager, said the funds will be used to support the growing population, boost its economic development, and improve the water quality for local communities and surrounding wildlife.

"The grant funding we've received to improve Archer's wastewater infrastructure will not only help accelerate the community's economic growth, but it will help enhance environmental resilience, protect local wildlife, and improve community wellness," **Hammond** said.

The Florida Department of Environmental Protection Wastewater Grant Program gave \$5,850,000 and \$987,254 was awarded by the Florida Department of Environmental Protection Clean Water State Revolving Fund.

The focus of the funds is to reinvent the design and construction of a centralized sewer system and a master lift station and force main system to send wastewater to the City of Newberry Sewage Treatment Plant. According to the press release, the city's wastewater system will reduce the amount of nitrogen entering groundwater and spring water, lowering the risk of contamination while benefiting local communities and ecosystems.

In Oct. 2022 the city was awarded more than half-a-million dollars to build a new community center in Holly Hills, along with other developments.

The grant writing and research for both awarded grants were provided by Kimley-Horn, which is a planning and design consultant.

Internet – Newspaper Archives Searches
Charles A. Hammond
(Articles are in reverse chronological order)

WUFT, NPR
December 20, 2022

Newberry in talks with Archer and High Springs about new \$40M regional wastewater treatment facility

Author: Silas Morgan

The City of Newberry is negotiating with the cities of Archer and High Springs about joining onto its planned regional wastewater treatment facility. The new facility is part of an effort by Newberry to overhaul its wastewater infrastructure to accommodate new development and meet new environmental regulations the state legislature passed several years ago; those will take effect when the city's current wastewater permit expires in mid-2026.

The new facility, which is still in the planning stage, is to be built in the Newberry Environmental Park, located within city limits on the 92 acres of land along County Road 337 purchased by Newberry last year for \$1.1 million. Sewer lines would be run from Newberry to Archer and High Springs if the partnership is finalized. It is expected to last for 40 to 50 years. Newberry's existing wastewater facility will be expanded and will continue to operate alongside the new facility, according to Newberry City Manager Mike New.

Rapidly growing Newberry had been planning the project prior to the state's new regulations, which caused the cost of the project to increase from \$25 million to its current estimated cost of \$40 million. Leadership from all three cities has spoken about the initiative for over a year. The city commissions for both Archer and High Springs have passed resolutions affirming interest in the project. Newberry is currently in talks with Trenton city leaders in Gilchrist County to have them join the initiative as well, but New said Trenton will likely not participate.

Newberry Mayor Jordan Marlowe said building a single facility would be more economically feasible and environmentally friendly than building separate facilities in each of the three cities. Marlowe also put emphasis on how difficult it is for smaller municipalities to afford such a project, which is why it is important for them to band together.

"As with all unfunded mandates, that makes the municipalities that now have to meet that standard scramble around to figure out 'How in the world are we going to meet that standard?'" Marlowe said. "Luckily for us, we were able to think outside of the box a little bit." Marlowe spoke about how he envisioned the concept of the initiative.

"Geographically, this concept makes sense. Newberry is kind of in the center of these other three towns so we can have a spoke," Marlowe said. "Going out in three directions gives us the opportunity to increase the population base that this would serve, which every time you increase the population base, it means that the resident on the back end will receive a lower cost."

Archer and High Springs would have to pay their share of construction and operating costs, according to New. Newberry's current wastewater payment model has residents pay a one-time

Internet – Newspaper Archives Searches
Charles A. Hammond
(Articles are in reverse chronological order)

charge when first joining its system in addition to a subsequent monthly wastewater bill. New plans to have a similar model put in place for Archer and High Springs residents if the cities join onto the facility.

New said support from state lawmakers, including state Sen. Keith Perry and state Reps. Chuck Clemons and Chuck Brannan, in securing funding for the \$40 million project has been crucial. “If we don’t get funding assistance from the government, state and federal level, then it becomes unaffordable for our ratepayers,” New said. “And Sen. Perry, Rep. Clemons and Rep. Brannan all put forth a great deal of effort helping us get funding from the state and federal governments to make our wastewater treatment affordable for our residents.”

Marlowe said while the project is largely targeted toward new development, some existing septic tanks in Newberry will be converted. The city will be looking for clusters of septic tanks that can be converted together. Marlowe plans to obtain a grant from the Suwannee River Water Management District that will allow the city to locate and map those clusters. “If we can identify clusters of septic tanks where it would be economically feasible to veer off and run sewer to those people, we could try to figure out ways to fund it and hook those folks in to eliminate the septic tanks,” Marlowe said. “Because that is one of our goals, to try to figure out how can we begin to slowly get people onto the city sewer.”

Archer City Manager **Charles “Tony” Hammond** declined the offer when it was first made but has since decided that joining Newberry’s facility is in Archer’s best interest. New said the facility is critically important to Archer’s continued economic development, especially considering Archer is now entirely reliant on septic tanks.

“Archer has not been able to grow because of the lack of sewer,” **Hammond** said. “We can’t bring businesses in. We can’t bring subdivisions in because we don’t have the capacity. Once we get the capacity in from this new plant, we’ll be able to bring subdivisions in, we’ll be able to bring businesses in, and we’ll be able to grow. Once we grow, our tax base is going to increase.” **Hammond** has previous experience with a similar project from when he worked for the town of Ahoskie in North Carolina, which supplied wastewater infrastructure for the nearby town of Powellsville. **Hammond** considers that initiative a success that can be replicated in Alachua County.

Archer is asking for a capacity of about 500,000 gallons per day, according to **Hammond**. He said he believes that the new facility will be able to support Archer for the next 30 to 40 years. **Hammond** said the more urgent concern is the city’s septic tanks are failing and leaking into and contaminating the region’s aquifer. “Many of the septic systems are failing. Those failing septic systems are going into the aquifer,” **Hammond** said. “One of our goals is to get everybody off the septic tanks and into a sewer system where the sewage goes into a treatment plant and is treated the way it should be treated.”

Marlowe aims to aid Archer’s beleaguered septic tanks as soon as possible. “We actually are hoping that we can get the lines in between Newberry and Archer laid faster than the facility

Internet – Newspaper Archives Searches
Charles A. Hammond
(Articles are in reverse chronological order)

built because we have enough capacity already existing that we can take some of the pressure off of them right now,” Marlowe said.

High Springs City Commissioner Katherine Weitz, who has a bachelor’s degree in chemistry from the University of South Florida and has extensively worked with groundwater and solid waste in the past, echoed a similar sentiment regarding environmental concerns, saying that improving the region’s wastewater infrastructure is crucial to maintaining the area’s environmental integrity.

“We only have the Florida aquifer here, and that’s where we get our drinking water from, so the potential for negative impact to our drinking water supply here is pretty profound,” Weitz said.

“We’ve already seen profound negative impacts to our springs, just from nitrate and fertilizer and human impact. And the time to be thinking about that is not 20 years down the road.”

High Springs currently has a second wastewater treatment facility under construction to support its existing one, which Weitz said needs to be repaired. She said an amendment the city commission passed in October about the development of the city’s Bridlewood subdivision could potentially double the population of High Springs, which would require a wastewater capacity that the two facilities could not meet, leading to further interest in Newberry’s plan.

The regional facility will also support a publicly-owned but privately-operated meat processing plant being built by Alachua County, which is expected to be completed by the end of 2026 and be built in the Newberry Environmental Park along with the wastewater treatment facility.

Meat processing produces a large amount of biowaste, which is why the county sought to construct it near the treatment facility. Marlowe has worked closely with the plant’s main sponsor, Alachua County Commissioner Anna Prizzia, in coordinating the two projects.

The deadline for the wastewater facility, which has not yet begun construction, is the expiration of Newberry’s wastewater permit in mid-2026. New said he believes the facility can be completed as early as late 2025.

Newberry and the involved cities are still discussing the details of the initiative. Neither Archer’s nor High Springs’ elected leaders have committed to joining the project yet.

**Internet – Newspaper Archives Searches
Charles A. Hammond
(Articles are in reverse chronological order)**

WCJF ABC 20
October 25, 2022

The City of Archer receives \$546k in grants and plans on building a new community center
Author: Taylor Simpson

ARCHER, Fla. (WCJB) - The City of Archer was awarded \$546,000 with half a million of it from The Florida Department of State African-American cultural and historical grant.

The city plans on using the funds to build a new community center in the historically black neighborhood of Holly Hills. "It's very good because we have so many young people and children around here that don't have anything to do or go and are on the road all the time. If they want to go somewhere they have to walk to the courts over there so it's really good for Archer," said resident Clora Nubin.

City Manager **Tony Hammond** said the center will have an indoor basketball court as well as multiple meeting rooms and a kitchen.

It will be located near the wastewater plant property the city bought years ago. "There's not a lot of on that side of the town other than the two small recreational areas and they have some swings and things like that. This is going to be a gathering place that they can go to and have activities and meetings," said **Hammond**.

There was also another \$46,000 that was awarded through the Florida Department of Economic Opportunities to assist in economic development and local growth.

Nubin said bringing more opportunities to their side of town will help many residents there. "We want the children to do something we have to go crosstown and here is the hub of the black community right here."

City leaders said these funds will help preserve archer's historic and small-town identity for its residents.

Internet – Newspaper Archives Searches
Charles A. Hammond
(Articles are in reverse chronological order)

The Gainesville Sun (FL)
July 10, 2021

Tests close Archer City Hall - Employees have tested positive for COVID-19

Author: Danielle Ivanov

"It is our goal to ensure that all citizens and visitors of our City remain protected from this deadly & global pandemic." Mayor Iris Bailey

Archer's City Hall is closed after an undisclosed number of employees tested positive for COVID-19, according to a Friday Facebook post from Mayor Iris Bailey.

In the public message, she said the city would not give any identifying information about the few who tested positive due to the federal health privacy statute HIPAA, also known as the Health Insurance Portability and Accountability Act. But she did urge anyone who visited Archer's city hall between June 21 and Tuesday to get tested for the virus. "It is our goal to ensure that all citizens and visitors of our City remain protected from this deadly & global pandemic," Bailey said in the post.

Vice Mayor Joan White told The Sun in a phone call Friday that closing City Hall does not mean the City of Archer is shut down. A skeleton crew is still working, answering phones and processing payments made electronically or placed in the drop box. The closure just means residents cannot go in and out of the building. White said she could not estimate when City Hall will reopen because it is unknown how many employees will be affected by the virus.

City Manager **Charles A. "Tony" Hammond** confirmed by text that the closure is indefinite while the building is being sanitized.

Because of the positive COVID-19 tests, city officials Thursday also requested to postpone its joint commission meeting with the Alachua County Board of County Commissioners, according to county spokesman Mark Sexton. The meeting was previously scheduled for 6 p.m. Monday. Its agenda on Friday stated just one item: reschedule with a recommendation for July 26.

"Out of an abundance of caution, we wanted to postpone the meeting and make sure that people have a safe place to gather," White said. "We wanted our building to be safe for anybody coming in." When asked why not meet virtually instead of postponing, White said she did not think it would be productive. Sexton said the county commission is ready to adjust to a Zoom format if needed.

Internet – Newspaper Archives Searches
Charles A. Hammond
(Articles are in reverse chronological order)

The Gainesville Sun (FL)
June 26, 2021

Ex-Archer mayor files ethics complaint - Costello says zoning rules not enforced fairly
John Henderson

Archer's former mayor has filed a state ethics complaint against a deputy city clerk she says bent city rules to allow her grandmother to put a mobile home on property not zoned for it.

Laurie Costello, a real estate broker who was a commissioner and mayor of Archer from 2004 through 2010, alleges that Deputy City Clerk Deanna Alltop showed favoritism toward a family member when she signed off on a city permit in January to allow a mobile home on the property at 16870 SW 134th Ave. Costello has been an ongoing critic of City Hall, filing numerous public records requests over the years and criticizing everything from water bills to government spending.

The property on 134th Avenue is zoned R-2, which is a single-family residential zoning prohibiting mobile homes.

Costello produced a copy of a notarized formal ethics complaint dated May 28, as well as a confirmation letter from the state, showing it received the complaint. "I'm in belief that our Deputy Clerk misused her position by approving a verification of zoning and setbacks to place a mobile home in an R-2 zoning for a family member, which is not allowed," she says in the complaint form.

Costello points out that Alltop's stepfather, Robert Kasicki, owns the property. Alltop lives there, and the separate mobile home is for Alltop's grandmother, Costello said. She added that the mobile home was put on the property in December 2020 — a month before Alltop signed off on the permit. "They tried to sneak it in without anybody knowing it because they moved the trailer on the property well over a month before they even applied for a permit," Costello said.

The zoning permit form, dated Jan. 6, 2021, was signed by Alltop and says the plans are to "place mobile home on lot." Also signing off on the document was the contractor, Jeff Hardee.

Kerrie Stillman, the deputy executive director of the Florida Commission on Ethics, said Friday that her agency could neither confirm nor deny that a complaint was filed against Alltop. "Complaints are confidential and exempt from public records laws until the (Ethics) Commission rules in the matter in some way," Stillman said.

Alltop, reached recently by phone at City Hall, said she has seen the complaint but she did not want to comment. City Manager **Charles Hammond** also had no comment. A woman who answered the phone at City Hall said the case is being reviewed by the city's attorney, Scott Walker, who also could not be reached.

Internet – Newspaper Archives Searches
Charles A. Hammond
(Articles are in reverse chronological order)

Archer City Commissioner Melanie Wells said she knows the property in question very well, as she and her family used to live on it in the 1970s. Wells said her grandfather was forced to take down a mobile home he had put on the property when the zoning problem was discovered.

She said when she saw the current mobile home on the property in December, she wondered if the city's zoning laws had changed to allow it, but they hadn't. She contacted the city manager, who she said has argued that it is a modular, not a mobile home. "That's what he says but I have not seen proof of it," Wells said.

Modular homes are allowed in R-2 zoning in Archer with special exceptions. A modular home is one in which pieces are built indoors in a factory-like setting. The finished products are covered and transported to their new locations, where a builder assembles them and they are built on a permanent foundation. Mobile homes, on the other hand, are built in a factory and placed on a trailer chassis to allow them to be moved.

Wells said it's clear from its appearance that it is a mobile home, and that's how the contractor described it in the permit as well.

Hammond explains to Costello in an email dated Feb. 8 why he thinks it's a modular home. He writes that the unit was at first in Chiefland on "initial setup."

"This unit was purchased as a modular unit by an individual and was brought in and set up in Chiefland, Florida," **Hammond** says in the email. "After it was set up, the individual became ill and was placed in a nursing home and the unit was sold to the current owner. Rather than disassemble the unit, they put it on a trailer and brought it to Archer as a single unit."

Wells said the city needs to be consistent in applying its zoning laws. "You can't tell someone they can do something and our ordinance says you can't do it, but then deny someone else," she said.

In 2018, retiree Rhonda Roberson sold her house in Tampa and had planned to put up a 15,000-square-foot Jacobsen mobile home on her R-2 zoned property. But she said an official at City Hall told her that was not allowed, so she ended up spending \$30,000 more to build a wood-frame home on the site that was 600 square feet smaller. She said the extra costs further depleted her retirement savings. "It sounds like who you know is what matters around here," she said.

Internet – Newspaper Archives Searches
Charles A. Hammond
(Articles are in reverse chronological order)

The Gainesville Sun (FL)
May 21, 2021

Archer celebrates splash pad Saturday

Author: Alan Festo

Kids in and around the city of Archer will have a new option this summer for cooling off from the oppressive Florida heat. After a year of delays due to the COVID-19 pandemic, the city of Archer will host a grand opening Saturday for its new splash pad at Wilson Robinson Park, 13975 SW 174th St.

The event will run from 9 a.m. to 1 p.m. and include free hot dogs, chips, popcorn and drinks. Kids also will be able to enjoy the new playground equipment and a bounce house. "It's a long overdue event. We had anticipated doing this Memorial Day last year," Archer City Manager **Tony Hammond** said. "Unfortunately, COVID put a halt to that."

Hammond said the long delay had no impact on the cost of the project, which included \$250,000 from the Alachua County Wild Spaces and Public Places tax, \$200,000 from the Florida Recreation Development Assistance Program, and \$125,000 appropriated from the governor's office.

The city used those funds over the last year to build the splash pad, resurface the tennis and basketball courts, install a security system, upgrade the restroom facilities, and install new playground equipment. "We upgraded the entire park," **Hammond** said. The splash pad will be open daily from 9 a.m. to 6 p.m., and is expected to be operational from April through October each year.

Hammond said the state health department mandates that no more than 16 kids use the splash pad at one time. "It's a small pad because we're obviously a small community," he said. Residents will have the ability reserve the splash pad for special events — such as birthdays — by calling Archer City Hall.

Archer Public Works Director Calvin Robinson, who has worked for the city for 23 years, was at the park Thursday morning with a crew testing the splash pad and putting down fresh mulch around the playground. Inspectors also were giving final approval of the restroom upgrades. "It's nice to see change, see growth," Robinson said of the new park features. "I hope it brings them (the community) together and they have a good time."

Archer city officials also are considering building a dog park. While a location has not been decided, **Hammond** said Alachua County deeded the city some well-shaded property behind City Hall, and it is big enough to split the park into two sides — one for smaller dogs and one for larger dogs. "We've had some donations from different people and businesses that have contributed to the dog park already so far," **Hammond** said.

**Internet – Newspaper Archives Searches
Charles A. Hammond
(Articles are in reverse chronological order)**

Mainstreet Daily News (FL)
August 12, 2020

County Commission cancels interlocal fire rescue agreement with Archer

Author: Suzette Cook

The City of Archer has a year to figure out whether it will create its own fire department since Alachua County has canceled its interlocal service agreement.

Alachua County Fire Rescue (ACFR) Chief Harold Theus told the county commission on August 12th that the ACFR offered to take over the station located at 17128 SW Archer Rd. Chief Theus said the ACFR is not interested in renting the fire station but wants to take ownership of the facility that they have paid \$450,000 in rent for when they took over the monthly mortgage payment of \$34,254.48 in 2007. Between the mortgage payments and maintenance upkeep, the county wants to transfer ownership of the facility from the City and has offered \$20,000 toward paying any surveys and closing costs.

Chief Theus listed the attempts to secure a deal with the City by meeting with City Manager **Tony Hammond** in February, then followed up with a letter, and reached out to City Attorney Scott Walker and on June 15th tried again.

Chief Theus said the Archer community and businesses benefit from the current staffing of Station #82 because of the ACFR's quick emergency response times and lower homeowners insurance premiums based on the ISO (Insurance Services Office) rating of 3 on a scale from 1 to 10. According to Theus, each business and homeowner within 5 miles from the station gets an insurance premium reduction.

According to Chief Theus, the ACFR responded to 481 total incidents in Archer with 170 incidents within the city limits in 2019. Chief Theus said he was reluctant to make the recommendation to cancel the agreement, "But I have to be fiscally responsible to the other citizens (of Alachua County) and I cannot recommend that we pay more in rent."

The Alachua County Board of County Commissioners (BOCC) was also bewildered by the non-response from the City and voted to end the agreement. Doing so gives Archer 365-day notice to determine how to cover their community with fire service.

The consequences Chief Theus said will be longer response times if Archer doesn't form its own department. The ACFR would then be answering calls from the Jonesville station, the 7000 SW 88th St. station and with help from Newberry Fire Rescue on the north side of town.

Not only would residents and businesses lose the ISO rating, but also community interaction with the fire department, building inspections and tests on fire hydrant flow would end.

Internet – Newspaper Archives Searches
Charles A. Hammond
(Articles are in reverse chronological order)

BOCC Commissioner Mike Byerly said he was "bewildered for the second time today," after hearing that the City of Archer is not responding with the ACFR's outreach. BOCC Commissioner Ken Cornell said the same word, "bewildered."

The following letter to Archer City Manager **Hammond** was dated February 13, 2020. "Dear **Mr. Hammond**, The fire station was built in 1999 and is now in need of a new roof, painting, and additional capital maintenance in order to remain operational. As the county now has invested nearly \$450,000 into paying the loan off, there is a desire to officially have ownership of the building prior to making capital investments in it.

At a February 4, 2020 meeting to discuss the future of the Archer Fire Station, Alachua County Fire Rescue Chief Harold Theus suggested that the City of Archer convey the fire station property to Alachua County for nominal consideration. The deed to the County would contain a reverter clause, transferring ownership of the property back to the City, in the event the County stops using the property for a fire station. This conveyance would allow the County to make major improvements to the building, such as the required roof replacement, without the problem of the County making capitalized improvements to an asset it doesn't own. Archer City Manager **Tony Hammond** was receptive to this idea and suggested a letter from the County to the Archer City Commission proposing the conveyance.

If acceptable to the Archer City Commission, the Alachua County Public Works Department will take an item to the Board of County Commissioners accepting the conveyance of the property. Public Works will also prepare the documentation necessary to transfer ownership of the fire station to the County, with the above described reverter language. The County will also pay the costs of closing, including survey, title work, inspections, document preparation and recording fees, as needed."

After no response, the current interlocal will be terminated on Oct. 1 and the City of Archer will have a year to make other fire safety staffing arrangements.

Internet – Newspaper Archives Searches
Charles A. Hammond
(Articles are in reverse chronological order)

Mainstreet Daily News (FL)
April 18, 2020

Archer plans for new playground and splash park

Author: Suzette Cook

At first, the City of Archer was planning to build a gymnasium for the community. But after taking the cost and upkeep into account, the commission decided to change their plans.

“We started talking about upgrading the playground equipment at Wilson Robinson Park Archer City Manager **Tony Hammond** said about how the commission decided to spend funds from the Alachua County Wild Spaces Public Places initiative. “We went to the county, and asked them to amend the contract to include a splash park and upgrade playground equipment.”

Hammond said the city also applied to the state and received \$125,000 appropriation from the governor. “We had \$225,000 in public places funds and our portion of the match,” **Hammond** said.

The final plan includes the removal of the old metal playground and the relocation of the play space with new prefabricated equipment to be adjacent to the pavilion at the park. And just south of the pavilion a splash park designed by Spray N Play out of Jacksonville will start going up in July.

“It will give the kids in this area something to do,” **Hammond** said.

The project was delayed due to the shutdown by the COVID-19 pandemic, but now the plans are set for the playground to be finished by the end of May and the splash park by the end of July or sooner, **Hammond** said.

And once those projects are complete, **Hammond** said the city is adding a dog park since the closest dog park to Archer is about 12 miles way.

Internet – Newspaper Archives Searches
Charles A. Hammond
(Articles are in reverse chronological order)

Roanoke-Chowan News Herald (NC)
April 13, 2017

Fond Farewell

Author: Cal Bryant

AHOSKIE – **Charles “Tony” Hammond** came to Ahoskie 12 years ago with an uncanny knack of getting things accomplished. He departs the town with a deep appreciation of his abilities.

On Tuesday evening, friends, colleagues and co-workers gathered to bid farewell to the former Ahoskie Town Manager. In return for their kind remarks of his work ethic, **Hammond** offered his gratitude. “I couldn’t have accomplished what we did here in Ahoskie without the efforts of our department heads and our great team of employees,” **Hammond** remarked, his voice trembling with emotion. “They made my job a lot easier.” As a Navy veteran, **Hammond** said he knew how to build character and forge lasting friendships. “Ahoskie is very near and dear to my heart, just like my time in Navy where I had the chance to meet hundreds of thousands of sailors,” he said. “I still correspond with many of them on the phone and on Facebook. That’s how I’ve lived my life....when I make friends, I make them forever.”

“We thank you for all the things you’ve done for our town,” Ahoskie Mayor Jimmy Rowe said as he spoke at the retirement event held at Catherine’s Restaurant. Veteran Ahoskie Fire Chief Ken Dilday told **Hammond** that while he and his boss sometimes didn’t see exactly “eye to eye” on some town matters, he respected the decisions that needed to be reached for the benefit of all involved. “You were fair to my department,” Dilday remarked. “You were good to the town’s employees and we’re all going to miss you. “We had some good times; there were times that I didn’t agree with you and there were times where you didn’t agree with me, but we got things accomplished. I enjoyed our relationship.”

Dilday presented **Hammond** with the nameplate that was positioned in front of the Town Manager’s chair on the Ahoskie Town Council podium. And, with the Mayor’s permission, awarded **Hammond** with a helmet (adorned with #1) from the staff and volunteers with the Ahoskie Fire Department. “Through Tony’s efforts, we have a new fire station, a far cry from that old building we once used, and all of our (fire) equipment is up to date,” Dilday stressed. “With what we have now I will proudly put our department up against any other fire department in the state.”

Ahoskie Public Works Director Kirk Rogers said he had the pleasure of working with **Hammond** for 11 of the 12 years the Town Manager served. “With Tony, you knew of his desire to get something done because when he sent me an email, there were a hundred exclamation points with it,” Rogers said with a laugh. “I want to return all those exclamation points and wish you continued success at whatever you do down the road. Thank you for all you did for our town.”

Internet – Newspaper Archives Searches
Charles A. Hammond
(Articles are in reverse chronological order)

Rogers presented **Hammond** with a small sign that was used to mark the Town Manager's reserved parking spot at the Ahoskie Town Hall. The back of that sign was autographed by town employees as well as those attending Tuesday night's retirement party. "This is a good sign, but it's a bad sign to see Tony go," said Stewart White, who directs the town's Wastewater Department and treatment plant and has worked for the Town of Ahoskie for 27 years. "I hate to see him go."

White recalled that before the town's new wastewater plant opened, Ahoskie could not experience any growth due to being placed under a moratorium by the state (because of the town's limited ability to store and treat sewage). "Tony and the town's engineers led an effort to build our new treatment plant, which by the way is the best one in the whole state," White said. He added that Ahoskie has spread its wings and flew high under **Hammond's** leadership, referencing not only a new treatment plant, but a new police station, fire station and recreation park. "Yes, they cost a lot of money, but that type of progress was needed in this town," White remarked. "If not, we would have sat around, grown old and not have anything to show for it. Tony brought about a lot of change for this town and we're better off for it."

Now retired Ahoskie Town Councilman O.S. "Buck" Suiter Jr. said he marveled at the impact **Hammond** had on Ahoskie. "I was on the Council for 29 years and the best decision we made over that time was to hire **Tony Hammond**," Suiter said. "We had a lot of problems when **Tony** first joined us and the things he did were great for this town. In my time on the Council we had six mayors and three town managers and none of them were like **Tony Hammond**."

Another former Town Council member, Ronald Gatling – now the Chairman of the Hertford County Board of Commissioners – also sang **Hammond's** praises. "I was on that Council who brought Tony here," said Gatling. "Buck is right, we had a lot of issues at that time. We were under a moratorium for our wastewater treatment plant and we badly needed a new police station and fire station in order to get them out of that little building they shared together. And we had that big area that had flooded behind the hospital to deal with, a project that became Tony's baby and look at it now (the Ahoskie Creek Recreation Park and Amphitheater)."

"Tony came in and tackled all of those issues; he brought us a plan," Gatling continued. "Tony just didn't come here with a vision to leave, he came here and made Ahoskie his home; like he had been here all his life. He got the job done." Gatling also praised **Hammond** for initiating a much-needed change in the salaries earned by the town's employees. "We were losing employees to the county and other places because of the way our salaries were structured at that time," he recalled. "Now, with salary increases and incentive bonuses, we raised the bar. Our employees are staying in place and working as a team and this town took off and grew....and we can thank **Tony Hammond** for that."

Former Ahoskie Councilman Malcolm Copeland noted that **Hammond** was a man of many talents. "He was very resourceful; if he didn't have an immediate answer to a question or was looking for ways to tackle an issue or problem, he knew the resources he could turn to for help," Copeland stated. "He had a lot of good and progressive ideas." Assistant Fire Chief Eric

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Whitmeyer said Ahoskie progressed under **Hammond's** direction. "You came here and took the bull by the horns," he said. "You were responsible for our growth. I appreciate the work you've done." "I've never had a person to answer a question before it was asked," added Mayor Rowe. "But that's what you got with **Tony Hammond**."

"He was a town manager, a friend, and a dad to many of us," said Ahoskie Police Chief Troy Fitzhugh. "But most of all, he was our leader and he has led this town to new heights. I'll miss him." **Hammond** was selected as Ahoskie Town Manager by unanimous vote of the Council on Dec. 1, 2004. He began those duties on Jan. 11, 2005. He came to Ahoskie following stints as Town Manager in North Topsail Beach (1998-2001) and Creedmoor (2002-2004). Prior to that, **Hammond** was a career Navy man, serving for 29 years (1968-1997), retiring as a Master Chief. While in the Navy, **Hammond** indirectly supervised 2,400 medical personnel and oversaw a \$2.4 million budget.

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(Articles are in reverse chronological order)

Roanoke-Chowan News Herald (NC)
March 1, 2016

Water meter project begins in Ahoskie

Author: Cal Bryant

Ahoskie - Change is good.

Beginning today (Tuesday, March 1), the town of Ahoskie will launch a two-month project to upgrade all residential and commercial water meters.

Ahoskie Town Manager **Tony Hammond** said the project has been in the works over the past few months to gear-up for the actual change-over of the meters.

“We have contracted with Ferguson Waterworks to handle the change-outs of our water meters,” **Hammond** said. “We expect the work to take two months to complete, so we’re looking to have this project completed by the end of April.”

Hammond stressed the importance of notifying the town’s utility customers that a private firm will be performing the work. “They (Ferguson Waterworks) will have designated employees changing the water meters,” **Hammond** said. “They will be easily identifiable as they will be wearing neon vests with the name of their business on the back of the vests. Their employees will also be wearing name badges. If you see these workers in your neighborhood then you can be certain they are who they say they are.”

Hammond added that Ferguson will start in one area of the town, complete the change-out of the meters, and then move to another neighborhood. “Our Public Works employees will use door hangers to notify residents of each neighborhood that the work is being performed there,” **Hammond** stated. He said any resident with questions or concerns about this project can contact the Town Hall at 252-332-5146.

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(Articles are in reverse chronological order)

Roanoke-Chowan News Herald (NC)
February 16, 2016

Dream comes true

Author: Gene Motley

AHOSKIE – As the NFL Carolina Panthers like to say, sometimes you just have to “Keep Pounding”. That’s what the Ahoskie Library Board along with the library’s volunteers, patrons, and others have been doing in hopes of one day seeing a new library in the town. That vision moved closer to reality Tuesday when Southern Bank presented the deed to a tract of land located adjacent to the current Southern Bank location on Main Street in Ahoskie.

Teresa Jenkins of the local Southern Bank branch made the presentation on behalf of her company; presenting the deed to Ahoskie Mayor Jimmy Rowe at the regularly scheduled meeting of the Ahoskie Town Council. “Southern Bank is proud and honored to be able to help make Ahoskie’s vision for a new public library become a reality,” said John L. Heeden, Senior Vice President for Southern Bank. “Ahoskie and the surrounding communities in northeastern North Carolina are a cornerstone of the bank’s prosperity and success, so it pleases us tremendously to be able to reinvest in the community toward something that will benefit everyone in the area for generations to come.”

Two Ahoskie Branch Library Board members were present for the presentation along with the Ahoskie Library branch manager. “One of the most important things about our library is that a lot of our patrons are foot traffic,” said Library Branch Manager Cindy Henderson. “This (new) site gives us an opportunity to have entrances on Main and Church Streets for a better traffic flow, and I’m sure we’ll be an asset to the area because we’ll be filling a space that will give Main Street a lift.”

Town Manager **Tony Hammond** has worked closely with the Library Board to bring the new facility to fruition. That includes meeting with the U.S. Department of Agriculture to secure a \$50,000 USDA grant back in the fall of 2014. Several months later the town sought RFQ’s from three architect firms before settling on and accepting a bid from Oakley Collier Architects of Rocky Mount, designers of the current Ahoskie Fire Station.

“They’re still designing it,” **Hammond** said. “They haven’t finished that yet.” The early design plans called for a 7,000 square foot building, later expanded to 10,000 square feet. Furthermore, **Hammond** has tried to help the Library group with interim financing. In the larger scope of grant funds, he said the state’s Local Government Commission (LGC) has to see the entire project once the designers have finished with the new library’s design and that could delay any ground-breaking. Once ground is broken, it’s believed the project would take approximately two years to complete.

There’s also the question of how much the town of Ahoskie would contribute to the project’s financing, and that’s being met with mixed results by the Town Council with some members’

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vigorous proponents while some others are much more cautious. The Town Manager has stated, and made very clear to Council, there is very little chance, to none-at-all, that the library could be built without an increase in personal property taxes.

“Bottom line, it’s up to them,” **Hammond** acknowledges. “I can bring this back from the LGC, the LGC can approve this thing, I can get financing set up by USDA; and still, until Council says yes, this entire thing can be rejected.” Library Board members are hoping as the town flexes its economic growth muscle there may be a way around getting an increase to finance the new library.

“We hope people will understand that if there is a tax increase, it won’t be because of the library,” Henderson says. “We serve so many parts of our community: continuing education, jobs and employment.” Now that the town has the land, the Board hopes signage will soon be in place announcing the library’s future home. In the meantime – they’ll just ‘keep pounding’.

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Roanoke-Chowan News Herald (NC)
October 15, 2015

News proposal

Author: Gene Motley

AHOSKIE – They're back. The Texas-based Buxton Group made a presentation before the Ahoskie Town Council at its regular monthly meeting here Wednesday and is ready to assist the town in marketing itself to new and old, large and small, retail businesses that want to locate in the town. Originally hired by Ahoskie with assistance from the Hertford County Board of Commissioners, the Mideast Commission, and the Northeast Commission five years ago, and then re-upped in 2013, the retail site selection firm produced critical fact-based information used by Ahoskie to proceed with the attraction and expansion of the town's retail sector. The research paid off with the opening of the Wal-Mart Super Store on US-13 south of town, along with Tractor Supply in the old Wal-Mart retail space, and the recently-opened Hardee's restaurant, located just across the highway from the same site. Wednesday's presentation by Robb Miller, sales director of Buxton's public sector division, was called "Small City ID" and is still aimed at identifying retailers and restaurants that best fit the Ahoskie market. "What we're here to talk about today is helping Ahoskie be more competitive when it comes to retail recruitment and business retention," Miller stated.

The purpose, Miller went on to add, is to improve the quality of life in the town, increase tax revenue, and retention of local business. "The last time we partnered with you guys we were very successful," Miller said. "We're responsible for over \$100,000 in tax revenue coming to Ahoskie every single year." Miller said the new focus was not just retail recruitment or economic development, but to assist the town with things like city services, parks and recreation, and health care. "We want to help you understand what your new movers look like, and what is their impact here," he acknowledged. Miller said that the prior program used in marketing Ahoskie was designed to provide potential retailers with factual data on existing locations and critical market information that would create interest in Ahoskie as well as support the town's needs to expand. Miller said there've been some strategic changes since they last worked with the town.

Buxton's web-based program, called SCOUT, now gives towns match lists and marketing packages they can access via the internet. "Who are your new customers," he implored. "Where are they, and how valuable are they?" With the closing of two of Ahoskie's internet cafes went fees the town received from privilege licenses. While sales tax off-sets some of that lost revenue, Miller thinks Buxton's strategies will bring in even more. He cited that in 700 communities the firm serves across the country they are able to generate \$6 billion in sales tax revenue annually. Buxton also assists communities in retaining current businesses operating in their areas by complementing them. "We don't want to cannibalize the businesses you already have in your area," he noted. "We want to help you keep local dollars local." "Should we enter into a partnership I'm very confident we can be even more successful this time around," he concluded. "We want to work as a true partner by understanding what do you want and what don't you

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want.” The cost to the town for Buxton services would be \$50,000 a year for three years, but the town could cancel the service after the first year by giving written notice.

Town Manager **Tony Hammond** said one of the town’s primary concerns is focusing on Main Street, and while Miller said that would not be an easy strategy based on preservation as well as bolstering business, he did see its possibilities. Councilwoman Linda Blackburn, who was familiar with Buxton’s earlier strategies in marketing Ahoskie, wanted to know how much the firm would shepherd the town through the new process. “Before, it was a little bit intimidating because we had data, but it was up to us to market ourselves, and we weren’t so good in doing that,” Blackburn explained.

Miller said account managers are part of the new strategy. “In the past we may not have been there to provide guidance,” Miller stated. “Now at every step of the way there’s someone there to assist you; from formulating recruitment to status updates where we go through each retailer. But you also can’t just hope you have to take a pro-active approach.”

Councilman Charles Freeman inquired about the cost breakdown from the prior agreement which Miller said was \$65,000, which was paid in two installments. **Hammond** said under the old agreement, the county paid one-third, the Mideast Commission and the Northeast Partnership paid a third, and Ahoskie paid the other one-third. The new agreement would \$50,000 annually over a multi-year period. “Should the climate change you guys would be able to exit after the first year,” Miller said. Miller said he understood the cost affect on a small community’s budget. “Even from landing just one retailer, the partnership (with Buxton) more than pays for itself,” he noted. “But landing just one retailer is not success; it just depends on what’s going to work best for you. We do work with entrepreneurs in attaining loans; we do provide value outside of targeting retailers.”

Hammond said Buxton’s prior work with the town helped speed along the ground-breaking of the new Wal-Mart Superstore, which led to the arrival of Tractor Supply to the old location. “We had two previous businesses with older stores (Dollar Tree and Family Dollar), and the data showed that a new store would support theirs, and both of those build brand new stores,”

Hammond said. Blackburn wanted to know where Hertford County stood as far as supporting a new Buxton agreement. “What we do in Ahoskie helps support the county,” she said Mayor Brien Lassiter asked for a motion either to set up a future workshop for the 2016 budget; to set up a discussion topic when the Council holds its retreat, to bring the topic back during the November Council meeting, or to discontinue discussion on Buxton’s new proposal altogether.

Councilman David Stackhouse made a motion to set up the Buxton proposal as a discussion topic during the retreat on the 2016 budget, seconded by Blackburn. Prior to the vote, Councilmen Maurice Vann and Charles Freeman requested the Town Manager provide additional information at the November Council meeting on the town’s business growth. The motion passed unanimously.

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Roanoke-Chowan News Herald (NC)
July 21, 2015

Ahoskie approves disaster readiness plan

Author: Gene Motley

AHOSKIE – The idea is to be prepared and work together. While the Roanoke-Chowan area has been spared the wrath of major Atlantic hurricanes for the past several years, a regional preparedness plan that the Federal Emergency Management Act (FEMA) several years ago asked counties and municipalities in the region to adopt demonstrates plans on how funds may be best spent during natural disasters. The Albemarle Regional Hazardous Mitigation Plan was designed for the counties of Camden, Chowan, Currituck, Dare, Gates, Hertford, Perquimans and Pasquotank and includes the towns of Ahoskie, Cofield, Como, Duck, Edenton, ElizabethCity, Gatesville, Harrellsville, Hertford, Kill Devil Hills, Kitty Hawk, Manteo, Murfreesboro, Nags Head, Southern Shores, Winfall and Winton.

As part of a regional effort to reduce vulnerability to natural disasters, the Town of Ahoskie requested public feedback on natural disaster risk and preparedness in order to assist the efforts of the counties and municipalities in combining respective local natural hazard mitigation plans into one regional plan. A mitigation plan identifies and assesses a community's natural hazard risks, and determines how to best minimize or manage those risks. At their regular monthly meeting on July 13, an overview of the plan was given to the Ahoskie Town Council during the public hearing to gauge feedback before the plan might be adopted by the town.

"FEMA directed (counties and municipalities) form these plans in order to be eligible to draw funds during disasters, such as disaster recovery, debris removal, and things like that," explained Town Manager **Tony Hammond**. Ahoskie Fire Chief Ken Dilday, who has been the town representative for the drafting of the plan, explained that it will protect life and property by reducing the potential for future damages and economic losses that result from natural hazards; allow the participating communities to qualify for pre- and post-disaster grant funding; speed recovery and redevelopment following disaster events; demonstrate a firm local commitment to hazard mitigation principles; and, comply with Federal requirements.

"This plan was provided by a grant several years ago, kicking off in Currituck back in 2014 and we had two public advisory meetings both in October 2014 and January 2015," Dilday explained. "The draft plan was approved by FEMA on May 12 of this year and the local adoption of the plan will complete the process and that's what we're doing here tonight."

Dilday went on to say the plan helps reduce the risk of loss of human life and property, and defines the role of local government in such a plan. "The primary responsibility is to protect the health and safety and welfare of its citizens and help reduce the risk by creating safer communities," Dilday said. "Everybody worked together in the planning process to develop a plan based on their risk to similar hazards thus saving time and resources to make the plan easier."

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Dilday said local counties and municipalities would still control their own disaster plans they have in place. “A whole lot of hazards were addressed, and a lot of them won’t affect us,” the Chief stated, “(things like) wildfires, Nor’easters, winter storms, volcanoes, earthquakes, and rip currents. All of them won’t affect us. The key objective is prevention, positive protection, natural resources protection, and public education.”

Dilday said once adopted the plan would be legal for the town and a resolution would have to be sent to North Carolina Emergency Management who would then forward it to FEMA; who would then approve it and it would return first to state Emergency Management before returning to the town.

“You will have to update it every five years starting with May of this year,” the Chief cautioned. “In a nutshell, basically this would cover stuff like what happened behind the hospital (the flooding on Lakeview Drive and the rest of that neighborhood) and gives us the authority to mitigate with FEMA.” Donald Kirkland, a citizen who attended the public hearing, asked if the town would retain its independent authority to act on the plan or negotiate through the county. Dilday answered that local authority would be maintained.

“We don’t lose any local control,” the Chief replied. With no further comment from the public, Mayor Brien Lassiter closed the hearing and with no discussion from the Council, Councilwoman Elaine Myers made a motion the town adopt the Plan and the Resolution that accompanied it; Councilman Rev. C. David Stackhouse seconded the motion. The plan and resolution was approved by Council unanimously.

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Roanoke-Chowan News Herald (NC)
September 16, 2014

NC 42 bridge slated for replacement

Author: Gene Motley

AHOSKIE – The NC Department of Transportation hopes to begin a highway construction project to replace the NC 42 bridge west of Ahoskie sometime by 2015, though they hope to begin some aspects of the project this calendar year.

At its regular monthly meeting, the Ahoskie Town Council approved Town Manager **Tony Hammond** authorizing and executing the required paperwork required of the town so the project may begin. NCDOT officials say the project is tentatively set to begin sometime in the late spring of 2015 so as to keep any disruptions or delays with school-bus traffic on the roadway to a minimum.

“In my discussion with DOT it’s going to take four-to-six months for this bridge replacement,” **Hammond** told the Council. NCDOT will pay the town of Ahoskie \$1,150 in required permanent easement/right-of-way fees prior to the start of the project. South Academy Street north-eastbound traffic headed into Ahoskie toward Ahoskie Creek Park Recreation Complex or Vidant Roanoke Chowan Hospital and other points east would be detoured onto Johnny Mitchell Road and then onto Lee Jernigan Road. Westbound traffic’s route would be Bonner Bridge Road to NC Highway 11 to NC Highway 561.

Hammond said based on his information the NC 42 bridge, in its current state had been deemed one of the six worst bridges in the state of North Carolina. Elizabeth H. Northcott, NCDOT Right-Of-Way Agent, present at the Council meeting concurred with that evaluation. “It’s old and falling apart,” Northcott told Council.

Town Attorney W.H. ‘Buddy’ Jones did inquire about the water re-use project and how it might be affected during the construction project, but was re-assured there would be no conflict or delay. With no further discussion, Councilman Rev. C. David Stackhouse made a motion before Council that the Town Manager be authorized to execute the appropriate documents to NCDOT. The motion was seconded by Councilman Maurice Vann and passed unanimously.

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(Articles are in reverse chronological order)

Roanoke-Chowan News Herald (NC)
August 20, 2013

Disk golf course opens

Author: Staff Writer

AHOSKIE – The Ahoskie Recreation Department has opened its first new full 18-hole Disc Golf Course with several armature pads for beginners at The Ahoskie Creek Recreational Complex. Hole 1 starts behind Baseball Field Number #1, running parallel to Lakeview Drive.

The public is invited to play this new and fantastic course. The Disc Golf Course features a variety of terrain types, hole distances, challenging for beginner and advanced players alike on 70 acres of land that includes the baseball complex, soccer fields, multi-purpose fields, picnic shelters, amphitheater, play grounds, walking trails and a dog park.

“This course is sure to attract players from all over the region,” said Ahoskie Town Manager **Tony Hammond**. “Currently, there are competition courses in North Carolina and we hope that this one becomes an attractive course for tournaments and individual players. We’re pleased to add this course at the Ahoskie Creek Recreational Complex as the first location in Hertford County. Disc Golf play is free to the public.”

If you are interested in an “Intro to Disc Golf” class, contact Tina Pritchard at 252-332-2064 or the Ahoskie Town Hall at 252-332-5146.

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Roanoke-Chowan News Herald (NC)
July 14, 2013

Growing Pains

Author: Cal Bryant

AHOSKIE – Growing pains....that was the generalized response heard here Tuesday at a meeting of the Ahoskie Town Council regarding concerns raised last month by a volunteer coach within the town's youth baseball/softball leagues who portrayed the summer program as one lacking leadership, organization, communication and responsibility.

After listening to the grievances aired publicly by Anna Parker at their June 11 meeting, Council members were promised an update by Town Manager **Tony Hammond** at their July meeting. "I talked to 10 of the coaches to gain their input, I left messages for others who didn't return my call," **Hammond** said. "Everybody had some concerns, some of them felt it more along the lines of the league going through growing pains than anything else."

Hammond advised Council members there were other concerns with the umpires, saying one had made inappropriate remarks to family members of one of the teams. "They felt he should be not allowed to umpire any more games; we made the decision not to let him work the games of that specific age group," **Hammond** said.

"There were some that felt the town should have one person responsible, supervising and overseeing, the baseball program and one for softball," **Hammond** continued. "We only had one total this year; that's something we can look at for next year."

Hammond said some believed that Ahoskie Recreation Director Tina Pritchard should be present at the baseball/softball complex whenever there are games being played. "Others said they know she can't be there every night when she runs a department during the day," **Hammond** stated.

Hammond said the majority of the concerns of the coaches he spoke with were linked to the beginning of the season. "There was some concerns about umpires being late; issues about not having equipment available," he noted. "After Tina went in and took over the program about three or four weeks into the season, most all these concerns were ironed out."

Hammond said the question that Council needed to answer is, "Let this program continue to grow and develop or is there a need for specific changes?"

"Personally I think this program is developing and I feel it's going to continue to develop," **Hammond** said. "Sure, there will be issues we need to iron out every year until we get this new program running smoothly. You can't expect a brand new program to run perfectly smooth." Councilwoman Linda Blackburn wanted to know why Parker was not in attendance at Tuesday's meeting, learning from **Hammond** that she wasn't contacted. She also inquired about the total

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number of coaches involved in the program, which is 33. “I ask that to find out what percentage of the coaches made remarks about their concerns,” Blackburn said. “I was given 21 names,” **Hammond** responded.

Pritchard was asked to give her assessment of the recently completed baseball/softball season, one where the program switched from the Tar Heel League to Babe Ruth/Cal Ripken. “The comments I heard from parents and others was this was the best season we ever had, with the exception of a couple of the softball teams,” she stated. “This is the first time we’ve had this many (seven) softball teams and I think they were experiencing some growing pains.”

She said the issue with the umpires was corrected early in the season, making the change from high school students calling games to hiring certified officials to work those contests. “I’ll be honest with you, I hated going out there last year, every time I went I was bombarded with this and that,” Pritchard told the Council. “This year I loved it. You could tell a difference this year.”

“I think this is a case of growing pains, although I’m very concerned that Miss Parker was not invited here today because she had some concerns,” Blackburn remarked. “I would like to make a recommendation. I feel certain there is paperwork handed out to parents, players and coaches at the beginning of the season. I would ask that in bold print that paperwork needs to indicate that there are two people – our Recreation Director and our Town Manager – to be contacted if they have questions, concerns, or suggestions.” “It’s a new program, one that took some time to start working well,” said Councilman Malcolm Copeland. “I agree, we need to let Tina and **Tony** handle it. There are proper channels people need to go through if they have concerns.”

“Sometimes you will have issues with any new program,” Councilman Winfred Hardy noted. “If you have people that will talk nice to others when expressing their concerns, that’s the main thing to making things work. I say let this program grow.”

“We think you (Pritchard) are doing a good job and the public needs to know not to get a negative attitude about our Parks and Recreation program,” stated Councilwoman Elaine Myers. The Council took no further action on the matter.

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Charles A. Hammond
(Articles are in reverse chronological order)

Roanoke-Cowan News Herald (FL)
June 27, 2013

Trash collection changes

Author: Cal Bryant

AHOSKIE – Changes, to include pick-up days, are in store for the collection of solid waste from residential and commercial accounts in Ahoskie. Effective July 1, the town will officially change contractors for the collection of garbage and recyclables. Last month, members of the Ahoskie Town Council approved a service contract with Waste Industry, making a change from GDS.

According to Ahoskie Town Manager **Tony Hammond**, municipal residents will no longer be able to place household garbage in the containers provided by GDS after June 30. GDS will complete the collection of their rollout carts and recycle bins by June 30. **Hammond** urged those with GDS carts to have them available at curbside.

Meanwhile, Waste Industry has begun the process of delivering their roll-out recycle carts to each residence in town. In addition to the recycle cart, each residence will receive a new rollout cart for household garbage. There is a change in collection days as Waste Industry has divided the town into four sections with garbage pick-up days once per week on Mondays through Thursdays.

Section 1 (Monday collection) is the southeastern area of town (south and east of First Street and the railroad track, to include South Catherine Creek Road, South Memorial Drive and NC 561, Harrellsville Highway).

Section 2 (Tuesday collection) is the northeastern portion of town (north and east of First Street and the railroad track, to include North Catherine Creek Road and the Ahoskie-Cofield Road area).

Section 3 (Wednesday collection) is the southwestern area of town (south and west of First Street and the railroad track, to include South Academy Street, NC 42 West, and the areas in and around Vidant Roanoke-Chowan Hospital).

Section 4 (Thursday collection) is the northwestern portion of town (north and west of First Street and the railroad track, to include North Academy Street and Colonial Acres). Fridays will be used as a catch up day for those missed on Monday through Thursday.

Waste Industry will provide a calendar with collection days and section identifications. **Hammond** said the recyclables will be collected every two weeks on the same day as the section's scheduled pick-up day. "Initially, each residence will be delivered one recycle and one household cart, each containing a serial number assigning that cart to a specific location and items for each type of cart cannot be co-mingled," **Hammond** said.

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“In addition and unlike with GDS, Waste Industry will be responsible for repairing broken carts and providing additional carts, at a monthly cost, should you need one. They will deliver requested carts and provide the Town Hall with that information to include the serial number,” **Hammond** added.

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Charles A. Hammond
(Articles are in reverse chronological order)

Roanoke-Chowan News Herald (NC)
February 26, 2013

Hertford County seeks \$5 million

Author: Cal Bryant

WINTON – Hertford County officials are moving forward with plans to construct a multi million-dollar E-911 Dispatch Center. At their meeting here last week, the county's Board of Commissioners were updated by County Manager Loria Williams regarding those plans.

"We've been working on this project and this process for a couple of years, trying to put together an application to the North Carolina 911 Board for 100 percent funding for an E-911 Center," Williams told the board. "We have worked closely with the police chiefs in Ahoskie and Murfreesboro along with Sheriff (Juan) Vaughan to develop an interlocal agreement. Everyone has been at the table working on this agreement for the past 12 months and everyone has signed off on it."

Williams said that she anticipates sending the grant request application to the state by March 1. "There was some confusion last year as it related to when the (application) deadline was and we missed that deadline at that time," she said. "This year we are way ahead of the game as the application window is open until April 30. We will have ours in by March 1."

Hertford County will request a shade over \$5,035,840 for the project, one that will combine the county's current trio of PSAP's (Public Service Answering Points – Hertford County Sheriff's Office and the police stations in Ahoskie and Murfreesboro) under one roof.

"For those counties looking to consolidate and provide a more efficient and effective service to its citizens, the state 911 Board likes those types of consolidated services and are willing to fund those types of projects 100 percent," Williams said.

The commissioners approved the consolidation of dispatch services last year. Still, Commission Chairman Curtis Freeman has some concerns. "A concern I've had all along, and I've stated it previously, with this proposed consolidation is how it will affect the Ahoskie and Murfreesboro police departments having a person on duty at the station at night to assist a citizen who goes there for help," said Freeman. "Perhaps that's a question to ask of officials in Ahoskie and Murfreesboro."

"You are right, that decision will be left to the towns individually," Williams said. "That also goes for the county. Do we keep someone at the Sheriff's Office at night? Or do we have someone at the E-911 Center at night (to handle potential walk-ins seeking assistance)." "I'll say this on the county's behalf, I'm against closing our doors at any time of the night," Freeman said. "What if a citizen goes up to the door and needs help? There was mention of installing a call box in the lobby (of the PSAP's). A citizen could pick-up that phone and be directly linked to the E-911 Center. My question then, as it is now, is would we eventually find someone dead holding

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that phone? If someone is after them and that person runs to the police station for help, they need protection then, not a phone.”

Freeman noted that the new E-911 Center may not be open to the public, meaning he would like to see the Sheriff’s Office staffed at night with a person able to provide immediate assistance if a citizen walked in looking for help. “Whether or not the E-911 Center will be open to the public is something we need to further study as we put together the standard operating procedures we will follow once that new facility opens,” Williams stated. “I want it where any one of our citizens can walk up at any time, day or night, and talk to a live person,” Freeman stressed.

Williams said the State 911 Board traditionally makes its announcement of grant recipients by June. “In the meantime we will move forward with preparation, to include the appointment of a governance board to oversee the operations of the E-911 Center,” Williams said. “Each entity in the county affiliated with this consolidation will be represented on the board. That group will come together to establish the protocols, the standard operating procedures of the E-911 Center.”

Representation on the board will include law enforcement personnel, firefighters, Emergency Management, Emergency Services, county commissioners and Ahoskie/Murfreesboro local government officials. According to project’s timeline, the governance board is scheduled to be appointed by March 29 and will meet by April 15. They will be charged with the task of drafting standard operating procedures and protocols by May 31.

If the grant is awarded to the county, the process will begin to hire an architect to design the facility (by Aug. 30); have that design approved by local and state officials (by Dec. 31); launch the bidding process for construction (by Jan. 6, 2014; bidding closes on Sept. 1) and begin construction in September of next year. Pending the completion of integration of the communications equipment and the testing of those items, the new E-911 Center may be open and in service by March of 2016.

The Center will consist of 10,124 gross square feet, to include room to allow for as many as four emergency services dispatcher to work at one time. The facility will also include office space for supervisors, break room/kitchen, restrooms, bunk room, lockers, showers, and storage areas. “This is a county operated center,” Williams noted. “The E-911 Director will report to the County Manager. That means Hertford County’s governing body has most of the responsibility and authority over that person. All of Hertford County’s personnel and travel policies will govern those employed in the E-911 Center.”

Assurance has been given to current dispatchers working the PSAP at the Ahoskie and Murfreesboro police departments that they will be able to carry over their service time to the county if hired to work at the new consolidated E-911 Center. In April of 2012, an operational budget was presented to the commissioners. There, Williams estimated the total non-reimbursable costs at \$489,527 annually. That money will pay for 12 full-time dispatchers, to include their benefits, plus operational costs (electric, gas, maintenance, etc.).

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As far as equipping the center, the county can tap into its share (as well as Ahoskie's and Murfreesboro's share) of the state's E-911 fund. That fund is built through a surcharge assessed to each land line telephone and mobile phone and then distributed to each emergency dispatch point in the state.

Once the new consolidated dispatch point opens in Hertford County, the salaries/benefits paid to the 12 full-time dispatchers will be covered by the county. Ahoskie and Murfreesboro will each contribute to the salaries and operational costs. Based on population, Williams devised a proportional cost for each governmental entity. The county's proportional share (based on having 63 percent of the total population, to include all municipalities other than Ahoskie and Murfreesboro) is \$285,241 plus \$36,763 it currently budgets for operational costs for the dispatch center now located in the Sheriff's Office in Winton.

Adding the current salaries/benefits for its four dispatchers with the operational costs, Williams said she annually budgets \$207,776 in non-reimbursable costs for the county's E-911 dispatch operations. On the flip side of the coin, Ahoskie and Murfreesboro will pay less for the merged operations than currently budgeted for their individual E-911 dispatch.

Ahoskie Town Manager **Tony Hammond** said his budget includes \$150,988 in salaries for the staff of five dispatchers. The total budget for Ahoskie's dispatch point, to include equipment and other costs, is \$234,000. Under Williams' proposal based on proportion of population, Ahoskie's 26 percent share of that total would mean the town would pay the county \$127,277 for their portion of the E-911 consolidation.

Murfreesboro Police Chief Darrell Rowe said his department's annual operational budget includes \$115,000 in salaries for four E-911 dispatchers. He stated there were additional costs to operate that dispatch point, with those monies coming from the state E-911 fund. With Murfreesboro accounting for 11 percent of the county's population base, Williams said the town's proportional share of operating a consolidated E-911 Center would be \$53,848 annually.

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Roanoke-Chowan News Herald (NC)
November 15, 2012

Apartments project moves forward

Author: Cal Bryant

AHOSKIE – Town officials here will move forward with a housing project minus one projected investor. At their Tuesday meeting, members of the Ahoskie Town Council voted in favor of applying for a \$350,000 Catalyst Program grant from the North Carolina Division of Community Investment on behalf of the Ahoskie Housing Authority (AHA) to assist in the construction of 12, one-bedroom apartments here that will benefit low to moderate income individuals with disabilities. The AHA wants to construct those apartments on land they own located on Everett Street off Memorial Drive. The entire project, which will be known as Longview Terrace, is listed at \$1.2 million. The \$350,000 is \$50,000 more than what was discussed by Council members at their meeting last month. Those additional funds – tacked on to support the water/sewer infrastructure needs for the apartment complex – are needed to help fill a financial void created by a decision by the Federal Home Loan Bank not to participate in the project. It was earlier projected that Federal Home Loan Bank may be a source of \$300,000 for the project.

Bill Farris of the North Carolina Department of Commerce said at Tuesday's meeting that \$600,000 has been secured for the project from the NC Housing Finance Agency. He added that, if approved, the Catalyst Grant program could add \$350,000 to that total. When asked by Councilwoman Elaine Myers about the timing of the project, Farris said the goal was to have the funding in place by the first part of next year and begin construction at that time. With the construction phase of the project expected to take 10 months, Farris said the apartments may be open by early 2014 for initial occupancy.

Another concern of the Council was if the Catalyst Program funds, if approved, would impact the town's ability to apply for any other grants. Town Manager **Tony Hammond** said that would not be the case, unless there was another project that wanted to tap into the Catalyst Program. "That program is available for a one-time application," **Hammond** stated.

Myers made the motion to proceed with the application process, to include the extra \$50,000 request. Councilman O.S. "Buck" Suiter offered a second and the motion was approved without objection. Farris reiterated remarks he made at the October meeting, saying the apartments were designed and constructed where everything is universally accessible – whether that's a wheelchair or a walker; and that the bathrooms and the kitchens are built to meet the needs of physically disabled occupants. Each apartment contains four rooms – bed, living, kitchen and bath. The kitchens are equipped with appliances. Farris said the Ahoskie Housing Authority is already working with CADA on a plan to provide renter assistance dedicated for these apartment units. The AHA has selected Tise-Kiester Architects to design Longview Terrace. Parker General Contractors will handle the construction.

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Roanoke-Chowan News Herald (NC)
August 16, 2012

Twenty years in the making

Author: Thadd White

AHOSKIE – It is a dream that has been quite literally 20 years in the making. Tuesday morning, officials with the town of Ahoskie were joined by state, regional and national leaders as they broke ground on the new Ahoskie Fire Department.

Ahoskie Fire Chief Ken Dilday said the town had been discussing the possibility of a new fire house since the 1970s, but the first actual drawings came some 20 years ago. “Here we are, August 14, 2012, 21 years and 10 months from the first drawings of a new fire station,” Dilday said. “It’s a great day. We want to thank everyone for coming.” Dilday went through the starts and stops that finally led the town to constructing the new fire station on a lot on Dr. Martin Luther King Jr. Drive. He said there had been studies on several locations in town, but the current space was finally home for the department.

Ahoskie Mayor Brien Lassiter began the festivities by welcoming the 100-plus people who gathered to celebrate the new fire department. “We want to welcome everyone to the ground-breaking ceremonies to the long-awaited Ahoskie Fire Department,” he said. Lassiter then recognized the visiting dignitaries, including U.S. Congressman G.K. Butterfield (D-1st), North Carolina Representative Annie W. Mobley and N.C. Senator Ed Jones as well as Randall Gore, the State Director of the USDA Rural Development. He also welcomed the members of the Ahoskie Fire Department, the Ahoskie Town Council and former Ahoskie Mayor Linda Blackburn as well as the architects and contractors.

Lassiter said the firemen were proud of their building and worked hard to maintain it, but the time had come for a bigger facility. “They need more room, they need bigger bays, a meeting room and better sleeping quarters,” he said. “In March of 2013, barring bad weather or disasters, we’ll be back here to open the doors.” The first dignitary to speak was Rep. Mobley who remembered her time serving as a court counselor with an office in the second floor of the Ahoskie Fire Department. “It is always a pleasure to come and stand before a crowd when we’re getting a new addition to our city as well as our county,” Mobley said.

The next person to speak was Betty Jo Shephard, the Eastern Representative for U.S. Senator Richard Burr. “It seems I come to Ahoskie a lot for good things,” she said. “I enjoy every time I’m here.” She said Burr sent his congratulations to the town. “Senator Burr knows how important this fire station is to the citizens of Ahoskie,” she said. “He knows how important our firefighters, our first responders are in all of our towns.”

Gore then spoke about the role of USDA Rural Development in funding the fire station. The Community Facility low interest loan of \$1.8 million and a \$50,000 grant came from USDA Rural Development. “Rural Development is committed to the welfare of rural communities in

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financing essential public structures and providing necessary resources for our first responders,” Gore said. “Fire fighters risk their lives to protect property and citizens and we must assist them by providing the best facilities possible. We are indebted to all firefighters as they risk their lives every day for the well-being of others.”

Congressman Butterfield then talked about the importance of the facility. “Thank you so very much for inviting me to be part of this very important program in the town of Ahoskie,” Butterfield said. “I want to thank the mayor, the city council and the manager for all of their hard work and their friendship down through the years. “One category of people I don’t want to overlook is the family; the family of people that make up the Ahoskie Fire Department,” he said.

“Each day you bravely and willingly take on the responsibility of keeping this community safe and protecting the residents from harm. We are thankful for your courage. There are many of our citizens who are alive today because of it. “You not only deserve our gratitude, you deserve our support,” he said. “That’s why we at the federal level, the Obama administration and the USDA have committed to investing in both rural communities and public safety projects such as the Ahoskie Fire Department.”

Ahoskie Town Manager **Tony Hammond** also said he was pleased to see the fire department begin construction and that he was thankful for all the work done by the town’s departments to prepare for the groundbreaking.

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Roanoke-Chowan News Herald (NC)
July 25, 2012

Wal Mart closes deal

Author: Cal Bryant

AHOSKIE – The papers are signed....all that's left is for construction to begin. Wal-Mart Real Estate Business Trust has officially closed the deal to construct a Super Center off US 13 South, adjacent to Freeman Metal Products, in Ahoskie.

Ahoskie Town Manager **Tony Hammond** confirmed that information on Tuesday afternoon. “(Wal Mart) has not finalized their contract with the construction firm as of yet, but that's the only thing standing between them and the start of building their new Super Center here in Ahoskie,” **Hammond** said. “The land deal has closed, the rezoning has taken place and the permitting process is complete.”

Hammond added that conversations he has had with Wal Mart officials up until this point indicate that a construction contract will be issued soon. “From what they're telling me, we may see something happening at the property within the next two to three weeks,” **Hammond** said. “They will not hold any type of groundbreaking ceremony.”

From all indications, **Hammond** said the 125,000 square foot facility may be open as early as March of next year. The property (17.33 acres) was purchased from Mary Francis Perry Johnson. The Ahoskie Town Council earlier approved rezoning that same property from R-20 to B-3. Additionally, town officials have certified the sufficiency of a voluntary annexation petition and has expanded the town limits to include that property.

In other economic development news, **Hammond** said the recent effort to attract new businesses to town is paying off. Abrams Barbecue of Tarboro has begun renovations of the old Popeyes Restaurant located on Memorial Drive near Central Ford. Abrams officials earlier informed the town that they hope to have the restaurant open early next year.

Meanwhile, the partnership between the town and The Buxton Group, a Texas-based company that spent the better part of last year conducting broad based marketing research to attract new retail stores and restaurants to the Ahoskie “drive time” market, has, according to **Hammond**, attracted “two bites.”

Hammond said Tuesday that of the 10 new businesses targeted by the Buxton survey as a good fit for the Ahoskie market, he has been in discussions with two. “Hardees and Sonic Drive-In are interested in Ahoskie,” **Hammond** said. “I'm doing some follow-up with both at this time. Hardees appears to be very interested, so much to the point that they're looking at several possible locations here in town.” Back in January, Buxton met with interested local citizens and business leaders, a group that culled a long list of possible new businesses for Buxton and Ahoskie officials to concentrate their efforts. Other than Hardees and Sonic, that list included

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Huddle House, Shoney's, Applebees, Western Sizzlin Steakhouse, Zaxby's, Denny's, Peebles Department Store and Tractor Supply Company. "The majority of what we're looking for is restaurants," **Hammond** noted at that meeting in January. "That's the key thing for our market. We're already strong in auto supply stores, furniture stores, pizza places, pharmacies and grocery stores. I don't want to see us waste one of our 10 letters on these types of businesses that are already strong in our market."

The Buxton Group launched its study in March of last year. Their methodology in performing its research of the Ahoskie/Hertford County retail trade/restaurant area was to first identify who those customers are, where they live and what is their value to the local market. After developing the trade area, Buxton used data gained through over 350 consumer information sources to match the best retailers to fit that area. The Hertford County Board of Commissioners, Town of Ahoskie, Ahoskie Chamber of Commerce, the Mid-East Commission and the Northeast Commission joined together to pay Buxton \$25,000 to perform the marketing study and put the town in direct contact with the top 10 businesses identified at the January meeting.

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Roanoke-Chowan News Herald
January 17, 2012

Urban hunting plan moves forward

Author: Cal Bryant

AHOSKIE – Town officials here have taken the next step to possibly allow deer hunting within Ahoskie's corporate limits. During their monthly meeting on Jan. 10, members of the Ahoskie Town Council approved a motion to hold a public hearing on an urban hunting season, a program offered under the direction of the North Carolina Wildlife Commission.

At Tuesday's meeting, Town Manager **Tony Hammond** readdressed the issue of allowing archery hunting within the town based on a request made last year by several citizens. He said there were some 40 municipalities in North Carolina that permit deer hunting by bow and arrow and crossbow.

"This is a program set up by the North Carolina Wildlife Commission and it tails a regular hunting season," **Hammond** said. "Once deer season (by gun) ends in early January, the urban hunting season follows that by about 30 days." **Hammond** said he has contacted Chris Turner of the Wildlife Commission and he has agreed to address the urban hunting season program with the town council at their next regularly scheduled meeting (10 a.m. on Tuesday, Feb. 14).

Hammond added that a public hearing on the matter could also be scheduled that day. "Following the public hearing, if council is interested in pursuing this program in the March timeframe I will bring you a resolution of participation and a map that designates those areas we wish to allow hunting," **Hammond** said.

He added that it is required of those taking part in a hunt within a designated area that they have written permission of the landowner. Hunting permits, which carry a fee (undetermined at this time), would be issued through the Ahoskie Police Department. Those holding a permit are required to hunt from an elevated stand. "They would pick-up a permit during the morning hours and turn it back in later in the day, that way we'll know who is hunting where at any given time," **Hammond** said.

Hammond said if a property owner wishes to participate in this program and allow deer hunting on their land, they are required to notify the town. "We've talked about this earlier and I'm satisfied with the regulations and the restrictiveness of this program," said Councilman Malcolm Copeland upon making a motion to allow for a public hearing on Feb. 14. Copeland's motion was seconded by Councilman O.S. "Buck" Suiter Jr. and was approved without objection. Council members first learned of the proposal at their September 2011 meeting.

Hammond said at that time he had researched other North Carolina municipalities and discovered that a few did allow deer hunting, by bow and arrow, within the town's corporate limits – Smithfield, Burgaw, Concord, Elkin, Fairview, Kannapolis, Kill Devil Hills, Mooresville

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and Nags Head, to name a few. “It is allowed because these municipalities are being overrun by deer,” **Hammond** said at the September meeting. “These deer are impacting gardens, flower beds and things like that.”

In Ahoskie’s case, **Hammond** said deer hunting would be limited to certain areas. “There are some areas where the deer population has increased,” **Hammond** said, identifying the Mitchell-Moore property along the railroad track and the rear portion of the town’s recreational complex. “Those are the first two areas I can think of that may qualify for the urban hunting program.”

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Roanoke-Chowan News Herald (NC)
June 16, 2011

Ahoskie budget climbs; tax rate falls

Author: Cal Bryant

AHOSKIE – The projected costs of operating the largest municipality in the Roanoke-Chowan area increases dramatically for the 2011-12 fiscal year, which begins July 1. On the other hand, the tax rate that feeds the town's financial coffers is decreasing. On Tuesday, the Ahoskie Town Council gave their approval to the new budget – a \$10.63 million package that includes a 76-cent (per \$100 of valuation) tax rate, marking a three-cent decrease from the current 79-cent rate. The tax rate decrease is due to revaluation of all property in Hertford County. That process, conducted every eight years, revealed an estimated tax base of \$229.4 million of Ahoskie residential, commercial and personal property.

Based upon the new tax base, Ahoskie Town Manager **Tony Hammond** said the revenue neutral tax rate (one producing the same amount of tax revenue with the current year budget) would be 73.9 cents. The extra 2.1 cents, he said, will be set aside for construction and debt service payments for a new \$1.7 million fire station. The new budget, approved following an advertised public hearing, reflects \$7.3 million in the General Fund, a 30 percent increase over the current year, and \$3.3 million in Enterprise Fund expenditures (an 11 percent hike).

Hammond said the new budget needs an appropriation of \$290,823 from the Fund Balance and another \$600,000 (\$253,395 in salaries plus \$346,605 in utility charges) from the Enterprise Fund to balance the budget. However, he pointed out that sound management practices throughout the coming year will hopefully result in none of those appropriations being used.

The new budget freezes the hiring to fill two open positions. Current employees will receive a cost of living adjustment to their salaries as well as merit-based pay increases. In addition to the fund balance transfers, projected revenues to help fuel the new budget include \$1.74 million in property taxes, \$679,967 in garbage collection charges, \$160,000 in motor vehicle taxes, \$645,000 in local option sales tax and \$150,000 in Utilities Franchise Tax. Another major revenue source will be nearly \$2.1 million in grants and loans to fund several capital improvement projects, the most notable of which is the new fire station. Other listed projects included \$153,176 for the police department, \$84,703 for the recreation department and \$95,000 worth of repairs for the town gym.

The lion's share of the revenue will fund the Fire Department (\$2.25 million, which includes the \$1.7 million for the new station), Police Department (\$2.1 million), Cultural & Recreational (\$761,741), Administration (\$535,785), Environmental (\$459,480), Streets (\$414,740) and Public Works (\$303,202). There are no increases to the rates of the town's water and sewer customers.

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Roanoke-Chowan News Herald (NC)
April 13, 2011

Ahoskie council amends parking ordinance

Author: Cal Bryant

AHOSKIE – Town officials here continue to make revisions to the rules and regulations governing traffic flow and parking. At their regular monthly meeting on Tuesday, members of the Ahoskie Town Council were in full support of a measure that prohibits vehicles from “wrong way” parking (with the driver’s side door adjacent to the curb).

Following an advertised public hearing on Town Ordinance 38-136, council members briefly discussed the issue prior to approving the revisions. Ahoskie Town Manager **Tony Hammond** explained that the current wording of Section 38-136 prohibits left side to the curb parking only in the town’s business district. “Basically, this is a form of parking where a vehicle, heading south, pulls to the curb side on the north side of the street,” **Hammond** explained. “The danger of parking this way comes by way of the driver having to cut across a lane of traffic to park at the curb and then repeat that unsafe movement upon getting back in their vehicle and returning to the traffic flow.”

Hammond went on to say that the Ahoskie Police Department has noted “wrong way” parking in other sections of town, not just along the Main Street (and adjacent streets) business district. “It is suggested that we make this a town-wide change,” **Hammond** stated.

The proposed change would make Section 38-136 read as follows: “Left side to curb not permitted in the Town of Ahoskie; exception – No vehicle shall stop with its left side to the curb in the Town of Ahoskie except upon streets or portions thereof designated for one-way traffic.” In another proposed change, **Hammond** informed Council members that he had met with the administrator and engineering department at Roanoke-Chowan Hospital in reference to a policy approved at the Council’s March meeting that eliminated parking on the south side of Sunset Street between Academy Street and Curtis Street (adjacent to the hospital’s main parking lot). That new policy totally reconfigured parking patterns on numerous streets at or near the hospital in an effort to improve traffic flow.

“They (hospital officials) are concerned over the lack of parking, the removal of all parking places on Sunset between Academy and Curtis,” **Hammond** said. “When we made that portion of Sunset a no parking zone we took away 22 parking spots.”

However, upon looking at the original study performed on town wide parking and traffic flow issues, **Hammond** noted a suggestion to only remove four parking spots on Sunset Street – the three closest to the Academy Street intersection and one at the Curtis Street intersection. “The vehicles parking all the way up to these intersections were creating a hazard,” **Hammond** said. “After my discussion with the hospital officials, they ask if I would come back and recommend to the Council that you amend the policy on that one street (Sunset) to allow for parking there,

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with the exception of the three spots near DrugCo, at the Academy Street intersection, and one spot at the Curtis Street intersection. That will leave them with 18 spots in between.”

“We, of course, want to work with the hospital, but if we begin to see traffic issues there, if we begin to see a growing number of accidents there, we will need to go back and re-visit this,” Ahoskie Mayor Linda Blackburn said.

In another parking related matter, Councilman Malcolm Copeland suggested that instead of restricting parking on Memorial Drive between Pembroke Avenue and Lakeview Drive, to open it to parking only on the north side of Memorial. Upon a motion from Councilman O.S. “Buck” Suiter Jr. and a second from Copeland, all three changes were approved.

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Roanoke-Chowan News Herald (NC)
November 10, 2010

Ahoskie poised for future growth

Author: Cal Bryant

AHOSKIE – The investment for future growth made by the Roanoke-Chowan area’s largest municipality is now poised to reap dividends. Beginning in 2009, Ahoskie officials physically launched several projects aimed at progressively moving the town forward as well as positioning itself to attract future residents and businesses.

On Tuesday, the Ahoskie Town Council listened to an update from Dan Boone, the town’s engineer from The Wooten Company, in regards to several ongoing projects which Ahoskie has made significant investments. Boone praised the Council and other town officials for their proactive approach. “Ya’ll have been very busy over the last year,” Boone said. “The wastewater treatment plant, the annexation project and the recreation park have resulted in a great benefit for construction firms in these tough economic times. “Those projects have generated in excess of \$20 million in construction projects here, providing jobs for people,” Boone continued. “The timing for you to save couldn’t have been better as these firms were bidding as much as 20 percent below what is normal. It allowed ya’ll to get a very good price on these projects.”

Boone said the new, state-of-the-art wastewater treatment plant – one valued at over \$17 million, is still scheduled to go on line in March of next year. He said the T.A. Loving Company, the project’s general contractor, was doing quite well to meet the deadline. “We believe he will finish early despite a problem with having one piece of equipment not yet delivered,” Boone stated. “It is manufactured overseas and delivery, to date, is late.” Boone explained the delayed equipment was an ultra-violet disinfection system. “It’s a fairly complex piece of equipment that once in place will be the final piece that brings everything there together,” Boone said. Boone added that T.A. Loving subcontractors are now in the process of grading the area, including the roads. Utilities Plus, a firm hired to install the pipeline from the wastewater plant to the Ahoskie Creek, has completed its work at a cost of \$236,361. Boone said the completion date for the treatment plant was March 21, 2011. “T.A. Loving does have a backlog of days they can claim due to weather delays, but they have done a good job mitigating those bad weather days and are on or ahead of schedule,” Boone noted. “They have not asked for an extension.” He continued, “We should see some water begin flowing into the wastewater treatment plant by the first part of January for testing purposes. By the end of January we may see treated water coming out.”

Another Ahoskie project – pavement repair and correcting drainage issues on Snipes Street – has been completed. Those maintenance issues were addressed thanks the influx of \$49,649.20 from a Community Development Block Grant. Meanwhile, two other projects, while divided, are actually under the same umbrella. Boone said the contractor has finished installing the water lines to the newly annexed portions of Ahoskie.

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“The annexation project is broken into two projects,” Boone said. “Hendrix-Barnhill completed the water lines in October and the system is in operation to the newly annexed areas at a price of \$305,000 which was lower than the bid price (\$335,495). You saw some savings there.” Now the town is setting its sights on providing sanitary sewer service to those same annexed areas. The cost of that project is estimated at \$2.8 million. USDA will fund 43 percent of that cost through a grant; the remainder will come from a loan. Boone said that project has been advertised and bids are scheduled to be taken Dec. 6. “We’re ready to proceed on that project,” Boone said. “We need to have the construction complete by June 30 (2011), that’s a key date.”

“This part of the project was a nightmare trying to get deeds and easements from people who do not live here,” Ahoskie Town Manager **Tony Hammond** noted. “In some cases we didn’t know how to get in contact with those we needed easements from. We had one case where we needed an easement for a pump station and every name on the deed was deceased. We started on this back in February and didn’t finish until the latter part of October. It took us a lot longer than anticipated.”

Hammond echoed Boone’s remarks about the importance of completing the sewer project to the new annexed areas by June of next year. “Once this project is issued those guys have a deadline and they will know what that deadline is,” **Hammond** said. “It was advertised in the bid that they must meet the deadline.”

The final project – the Ahoskie Creek Recreational Complex – is basically complete with the exception of a few “punch list” items. That project came with a \$1.45 million price tag. “That work turned out very good, it’s a project the town should be very proud of,” Boone said of the recreational facility.

Hammond noted that an AAU (Amateur Athletics Union) representative has been contacted and has shown interest in coming to Ahoskie to look at the new ballfields. It is hopeful that AAU will add the town to the stops on its baseball/softball circuit as early as next year. There are plans to expand the recreational facility to include a dog park, splash (water) park, additional walking trails and adding a parking lot. Currently, the town is seeking grants to help pay for that expansion. “There is a lot of competition for limited dollars,” Boone said in reference to the possible sources for grant funding. “We will do our very best to pump up Ahoskie’s grant application.”

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Roanoke-Chowan News Herald (NC)
October 1, 2010

Creek floods Ahoskie

Author: Cal Bryant

AHOSKIE – Inundated by reports of two feet of rainfall, town officials here are keeping a close eye on the Ahoskie Creek which flooded in the aftermath of a week-long weather event.

Town Manager **Tony Hammond** said the creek was expected to crest on Saturday. As of 8:30 p.m. on Friday, the creek level appeared to have leveled off, measuring 14.71 feet at the NC 42 bridge. That was down from the 7 a.m. measurement (14.84 feet). In comparison, the measurement was 2.93 feet early Wednesday morning. Ahoskie Creek crested at 17 feet in the aftermath of Hurricane Floyd in 1999. “We’ve had a ton of rain; a lot of it fell very hard and fast,” **Hammond** said at lunchtime on Friday.

Hammond said the rain gauge at the town’s Wastewater Treatment Plant off Johnny Mitchell Road had been emptied three times since Sunday. The gauge holds eight inches of rain. “That’s at least 24 inches of rain since Sunday; you can’t expect that much rain to quickly go away,” **Hammond** said.

With the exception of the McGlohon Street-Roberts Street area and the overwash at Evans Street and NC 42, all of Ahoskie’s streets are not experiencing any flooding issues. That wasn’t the case on Thursday where 32 streets were flooded. Currently, the major problem area is adjacent to the Ahoskie Creek. The Ahoskie Creek Recreational Complex is underwater. It was that area of town that severely flooded during Hurricane Floyd. The homes there were purchased by FEMA and eventually turned over to the town.

Recently, the town invested \$1.1 million of its own money plus grant funding to construct the Ahoskie Creek Recreational Complex. The newly constructed ballfields there were experiencing minor flooding on Friday afternoon. “The outfall drainage ditch there did its job on Thursday, but when the creek began to rise there was nowhere for all that water to go,” **Hammond** noted. There is also one residence on West Memorial Drive threatened by the flood waters from Ahoskie Creek. Meanwhile, several major roads leading in and out of Ahoskie are underwater. Overwash from the Ahoskie Creek has forced the closure of NC 42 at Evans Street and US 13 South is closed just north of Stoney Creek. NC 561 East (Harrellsville Highway) is closed at Godwintown Road due to flooding at the Bear Swamp Bridge. NC 11 (North and South), US 13 North and NC 561 West were all open as of early Friday afternoon.

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Charles A. Hammond
(Articles are in reverse chronological order)

Roanoke-Chowan News Herald (NC)
January 19, 2010

Ahoskie Council approves recycling upgrade

Author: Staff Writer

AHOSKIE – Despite objection from one Ahoskie Councilman, town officials here will proceed with an upgrade to an existing recycling program. At last week's council meeting, a motion was approved for Ahoskie to participate in the Recycle Roll-Out Cart Grant Program, one administered by the North Carolina Department of Environment and Natural Resources. While there are no costs incurred by the town or its residents during the initial three years of the grant program, newly seated Councilman Winfred Hardy cast the lone "no" vote in the measure that was approved by a 4-1 count.

Hardy said his reasoning behind voting against the measure was, "I didn't want to see three years from now that the law has changed and we have to have this (program)." The measure first came to the council's attention at their December meeting. There, council members expressed an interest in the program, but directed Town Manager **Tony Hammond** to gain additional information and bring that back for presentation at their Jan. 12 meeting.

"The grant will pay all costs associated with the program for three years," **Hammond** said at last week's meeting. "There are no costs involved by the town during that three-year period. At the end of those three years, it's up to you (council) if you want to continue the program."

Hammond said he had discussed the program with GDS, a firm contracted by the town for garbage and recycling collection. GDS will accept the grant funds to offset their costs for supplying a 65-gallon roll-out cart to each residence currently with a GDS garbage roll-out can and collecting the recyclables placed at the curb on a weekly basis. If the town opts to continue that program after the three-year grant period, it will cost an additional \$1.25 per month, per household. "These roll-out carts are better than the hand-carried tubs now used by our residents for recyclables," **Hammond** noted. "These carts make it more convenient for our residents to take their recycled items to the curb and I feel that it will help promote an effort to recycle."

Councilman Malcolm Copeland agreed, saying, "Some of our residents cannot physically lift those recycling containers now in use. These roll-out carts will help." After the council confirmed that the state will pick-up the tab on the program for three years, thus not costing the town's residents, Copeland was joined by Elaine Myers, Maurice Vann and O.S. "Buck" Suiter Jr. in voting to approve the grant program with Hardy casting the dissenting vote.

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Charles A. Hammond
(Articles are in reverse chronological order)

Roanoke-Chowan News Herald (NC)
September 5, 2009

Wastewater expansion vital to Ahoskie's growth

Author: Thadd White

AHOSKIE – It was a time of both celebration and reflection. Thursday morning dignitaries from the local, state and national levels gathered to officially break ground on the new Wastewater Treatment Plant for the town of Ahoskie. “This has been a long journey that took extreme cooperation from a lot of people,” Ahoskie Town Manager **Tony Hammond** said. “It is my pleasure to welcome you to this historic event.”

Dan Boone, the project engineer from The Wooten Company, gave a history of the project. He said the town started the current spray field system in the late 1980s with a total of 300 acres which would allow them to spray 900,000 gallons of treated wastewater per day. In 1998, the Ahoskie wastewater facility was recognized by the Environmental Protection Agency as the best in Region IV and the second best in the nation. Boone said the town came under a Special Order of Consent more than 10 years ago and has been operating under it ever since. That SOC proposed a moratorium and restricted some growth in the town.

In July of 2007, The Wooten Company proposed an expansion of the wastewater treatment facility to a new capacity of 1.3 million gallons to be discharged first to Hertford Renewable Energy and then to the Ahoskie Creek. The total cost for the project was over \$17 million.

Work began with the United States Department of Agriculture's Rural Development initiative, the Clean Water Trust Fund and the Rural Center to receive grants and a low-interest loan funding for the project. The project began with the awarding of the bid to T.A. Loving Company last month and is now scheduled for completion in January of 2011.

Ahoskie Mayor Linda Blackburn said she had only been in office for six years and couldn't speak as well as others about the long history of the project. She said, however, she could talk about the hard work and dedication of the employees of the wastewater treatment plant. “In my six years, I can speak to the quality of the staff here at the wastewater treatment plant,” Blackburn said. “Stewart White and his staff have always done an excellent job. “As they have shared their needs with us over the years, the staff has continued to work diligently with what we had,” she added. “I am excited that we will turn this new plant over to very capable hands.”

White, Wastewater Treatment Plant Superintendent, then spoke about the support his staff had received from the mayor and Ahoskie Town Council. “I'm proud to be here today,” he said. “I want to thank the Ahoskie Town Council for all they do for town employees and I want to thank the staff here for keeping this place looking so nice. “It has been a long time coming,” he said of the new plant. “Ahoskie is leading the way. I have been told that by several people concerning this plant.” White also commended the North Carolina Division of Water Quality (DWQ) for their understanding and helpfulness during the process. Ahoskie Mayor Pro-Tempore Ronald

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(Articles are in reverse chronological order)

Gatling admitted he stood before the group with mixed feelings. “I’m kind of surprised I was asked to speak,” Gatling mused. “I’ve called everyone here all kinds of names at some point in this process. I’ve questioned the staff, The Wooten Company, DWQ and everyone else. “I stand here with mixed emotions because of knowing this is necessary, but I am also mindful of the burden that it puts on our taxpayers,” he said. “It took a long time, but we finally got serious about it four years ago and here we are.”

North Carolina State Senator Ed Jones (D-4th) said making tough decisions were part of the job and he commended the Ahoskie Town Council for moving forward with the plant. “Decisions have been made today that will be beneficial to the generations to come,” he said. “The nay-sayers of today will be applauding us tomorrow.” Representative Annie W. Mobley (D-5th) said she was pleased to see so many people coming together to make the project possible. “The communities must pull together to realize a project like this,” she said. Rep. Mobley also commended the late Representative Howard J. Hunter Jr. and late Senator Robert L. Holloman for their work in making sure Ahoskie could build the wastewater treatment plant. “We can only say thank you and give credit to the Almighty for the realization of this project,” Rep. Mobley closed.

Also speaking was Congressman G.K. Butterfield (D-1st) who praised the work of the USDA Rural Development office and what is happening in Ahoskie. “Before I got to Washington, D.C. I didn’t appreciate the work of USDA Rural Development,” the Congressman said. “It is important in the life of eastern North Carolina. “There is a USDA Rural Development office in every state and I’m told that we have the best one in the United States of America,” Congressman Butterfield said. “They have a non-partisan track record. I want to thank USDA for making this loan available to the town of Ahoskie.” He also said he understood the wastewater treatment facility would cause some burden for the taxpayers. “We have to provide infrastructure, but we also have to provide new jobs to help people,” he said.

Richard E. Rogers Jr. of the Clean Water Management Trust Fund also spoke about his agency’s excitement to be part of the project. “This is a project that is innovative and that supports and protects surface waters in North Carolina,” Rogers said. “It also protects the Chowan River, which we must continue to do.” Betty Jo Shephard, a representative from the office of U.S. Senator Richard Burr (R-NC), was also on hand for the ground breaking. “I offer you congratulations on behalf of Senator Burr,” she said.

Shephard also said she appreciated the work of USDA Rural Development in helping fund the project and called Ahoskie officials as leaders in the region. Offering congratulations on behalf of the Rural Center was Robert Partin. “We’re pleased to be able to be part of this program,” he said. “The Rural Center is here to help communities in need.” After speaking about the project, the gathered dignitaries broke ground on the project.

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Charles A. Hammond
(Articles are in reverse chronological order)

Roanoke-Chowan News Herald (NC)
July 21, 2009

APD dedicates new station

Author: Thadd White

AHOSKIE – A vision is now reality. Dignitaries from Ahoskie, Hertford County and the surrounding region came together Monday morning to celebrate the culmination of a vision of the Ahoskie Town Council and the Ahoskie Police Department.

A crowd gathered to dedicate the brand new Ahoskie Police Department building and celebrate with the officers and the town. “I want to personally thank all the members of the Ahoskie Police Department,” said APD Major Jimmy Asbell. “Welcome to your new home away from home. Enjoy it. You deserve it.” There was a joyous spirit in the crowd as Mayor Linda Blackburn, APD Chief Troy Fitzhugh, the Ahoskie Town Council and a crowd of well-wishers heard from those responsible for the vision that led to the new building.

“Thank you for all being here and joining us as we dedicate this beautiful building,” Mayor Blackburn said. “I’m pleased to work with a town council and town manager (**Tony Hammond**) who have vision.” Blackburn also commended the people for who the building was built: the officers of the Ahoskie Police Department.

“With all the beauty of the building, the equipment and everything we have, the real beauty is the men and women of the Ahoskie Police Department,” Blackburn said. Then, turning to the officers gathered at the dedication ceremony, Blackburn said, “Thank you for all you do. We pray for your safety every day.”

Mayor Pro-Tempore Ronald Gatling also spoke about the vision that led to the building. He said he remembered many years ago when he and fellow Town Councilman O.S. “Buck” Suiter met with then Ahoskie Police Chief Steve Hoggard to discuss the need for a new police station. He said during the years, the plans have changed and many times the principal players have had to start anew, but it was all worth it now that the building was completed. “I stand here elated,” he said. “I’m happy for the vision we had and didn’t give up on.”

Ahoskie Chamber of Commerce Director Jerry Castelloe extended congratulations on behalf of the business community. “Today is a great day for Ahoskie,” Castelloe said. “To the mayor, town manager, chief of police and men and women of the Ahoskie Police Department, from the business community I say congratulations. We’re excited for you.”

Also offering congratulations were other law enforcement officials including Hertford County Sheriff Juan Vaughan and Judicial District 6B Attorney Valerie M. Asbell. “It’s a wonderful day,” Asbell said. “This is a tremendous building and it will do the town a lot of good.” Asbell also said that former Chief Hoggard and Gates County Sheriff Ed Webb, who were officers with the APD in the past, would be greatly appreciative of the new building. Both men were in

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attendance to support the current APD staff as they moved into the new building. “I appreciate the Ahoskie Police Department,” Asbell added. “I believe God ordained these officers to protect us. I don’t think we say thank you enough.”

Sheriff Vaughan remembered starting his law enforcement career with the Ahoskie Police Department and said he was happy to see the officers finally have a new home. He commended the council for the vision of getting the facility. “It is great to have a facility like this because it is good for the work environment,” he said. “That improves work for everyone.” On hand to offer congratulations were also Susan Christensen of the U.S.D.A. Rural Development, Russell Pearlman of The Wooten Company and John Bassett of JBI, Inc. All offered their congratulations on the building being completed and their thanks for working on a project that went so smoothly.

Following their thoughts, Major Asbell spoke on behalf of the APD, honoring Mayor Blackburn, the town council, Town Manager **Tony Hammond**, Assistant Town Manager Evelyn Howard, USDA, the Wooten Company, JBI and all the other town departments.

Hertford County Commissioner DuPont L. Davis spoke on behalf of the county, offering congratulations and his best wishes with the new building. “I’m a Hertford County Commissioner, but I’m also a citizen of Ahoskie and I’m proud of what we do here,” he said. “Chief, I don’t mind paying taxes to help pay for this building.” The ceremony began with the raising of the colors by Sheriff Vaughan, Mayor Blackburn and Officer Ty Metzler along with the Hertford County High School color guard. The national anthem was sung by Anthony Fitzhugh and Jessica Jackson. After the ceremony, citizens were given a tour of the new police department.

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Roanoke-Chowan News Herald (NC)
January 15, 2009

Ahoskie plans to expand recreation complex

Author: Staff Writer

AHOSKIE – The Ahoskie Creek Recreational Complex is less than one year old, but is already experiencing growth at such an early age. At their regular monthly meeting here Tuesday morning, the Ahoskie Town Council voted unanimously to seek funds from two granting agencies in an effort to expand the complex (formerly known as the FEMA buyout area behind the hospital and adjacent to the Ahoskie Creek).

Ahoskie Town Manager **Tony Hammond** proposed Phase 1B of the recreational complex. That expansion would include a 3,400-foot asphalt trail (8-foot wide and ADA assessable) that follows the edge of the Ahoskie Creek. The cost of the trail is projected at \$82,000. Also included in the expansion are a one-half acre Splash (water) Park, a Dog Park and a parking lot with a 150-car capacity. The Splash Park (50-foot by 60-foot at a price of \$225,000) will feature 11 water elements. It also features a water reuse system. The \$25,000 Dog Park will be fenced in with double gates. It includes water and litter stations. The parking lot comes with a price tag of \$160,000. Adding in the contingency fee and the costs of planning, Phase 1B of the complex is expected to cost \$615,000.

To pay for the project, **Hammond** requested council members to approve two grant requests – one to the North Carolina Parks and Recreation Trust Fund (PARTF) in the amount of \$307,500 and the other from CAMA (a coastal area management organization) for \$276,750. The remaining \$30,750 would come from the town. “That’s a pretty good deal, getting \$600,000 worth of park improvements for our investment of about \$31,000,” **Hammond** noted. **Hammond** added that the grant applications were due by the end of this month.

Upon a motion from Councilman Ronald Gatling and a second from Councilman Buck Suiter, the grant proposals were approved without objection. Prior to the vote, council members and **Hammond** briefly discussed the current status of Phase 1A of the recreational complex. The town manager said all elements of Phase 1A would be completed this year. Those elements include three baseball/softball fields (all lighted), a lighted football field, two beach volleyball courts, covered shelters, concession stands, restrooms and a playground. Two soccer fields and the Ahoskie Amphitheater are already completed. In July of last year, the town received a \$500,000 PARTF grant and borrowed \$1.1 million from RBC Centura to launch its plans for turning the old buyout area into a recreational complex. The recreation loan will be repaid (\$73,333.33 annually) over a 15-year period at a 3.99 percent interest rate. Due to Ahoskie’s strong debt management procedures, there will be no need to increase property taxes to repay the loan.

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Charles A. Hammond
(Articles are in reverse chronological order)

Roanoke-Chowan News Herald (NC)
December 11, 2008

Landfill approval takes first step

Author: Staff Writer

AHOSKIE – An approved text change within Ahoskie’s Zoning Ordinance has opened the door for a landfill. At Tuesday’s regularly scheduled meeting, the Ahoskie Town Council, on a motion from O.S. “Buck” Suiter Jr. and a second from Malcolm Copeland, gave their stamp of approval to a text change. That approval came following a public hearing, one concerning a request made by Rose Brothers Paving Company, Inc. who applied for the zoning ordinance text change as they seek to place a Land Clearing and Inert Debris Landfill on property they own on Commercial Road.

While the property is not inside the Ahoskie corporate limits, it is within the town’s ETJ (Extra Territorial Jurisdiction), meaning it is regulated by town code. Prior to the public hearing, Ahoskie Town Manager **Tony Hammond** explained what types of materials would be placed in the proposed landfill. He noted disposal is limited to land clearing waste, concrete, brick, concrete block, uncontaminated soil, gravel and rock, untreated and unpainted wood and yard trash. He further explained that yard trash is solid waste resulting from landscaping and yard maintenance, such as brush, grass, tree limbs and similar vegetative materials. “This area would be for the private use of Rose Brothers Paving only,” **Hammond** said.

Hammond added that none of the three adjacent property owners had any major issues with a landfill of this type. He said the Ahoskie Planning Board had approved the request to change the ordinance text and forwarded their decision to the town council. “In our current zoning ordinance, we do not list a category that describes this type of facility,” **Hammond** said. “If you decide to approve this request, we will add such language to the ordinance that accurately describes this type of landfill.”

He added that the site is currently zoned Light Industry and is at the end of Commercial Road (approximately two-tenths of one mile off NC 42 near the Poortown community). “Rose Brothers has applied for a permit from the NC Department of Environment and Natural Resources (DENR) in order to create and operate a landfill of this nature,” **Hammond** said. “The decision to grant or deny that permit is in the hands of DENR. Your only part in this is to grant or deny the text change in our zoning ordinance.” **Hammond** added that DENR needed a decision from the Ahoskie Town Council in regards to the zoning text change before they can act on the measure.

W. Reid Clark, representing Rose Brothers, said his company must adhere to all DENR regulations if the landfill was permitted to operate. He said the landfill will be surrounded by an 8-foot fence as well as a dirt mound barrier, similar to the one they own and operate in the Murfreesboro area. “The state says the landfill can only cover two acres,” Clark said. “It doesn’t

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make any difference if we have 100 acres back there, the landfill can only cover two acres.” The tax listing on that property shows Rose Brothers owns 5.6115 acres on Commercial Road.

When asked by Copeland about what happens when that two acres is full, Clark said nothing else could be added. “We will recycle the material at the landfill in order to free-up space,” Clark said. Councilwoman Elaine Myers addressed the visibility issue, saying she was pleased to hear that the proposed landfill would be surrounded by a barrier. “It doesn’t sound like anyone is opposed to this, even the adjacent landowners,” Suiter said prior to making a motion to approve the text change.

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Charles A. Hammond
(Articles are in reverse chronological order)

Roanoke-Chowan News Herald (NC)
October 10, 2008

For Rent: Ahoskie Amphitheater

Author: Staff Reporter

AHOSKIE – Town of Ahoskie officials are extremely proud of their newly christened amphitheater...so much to the point that they will let others enjoy the use of the facility. At their monthly meeting here Tuesday, the Ahoskie Town Council approved a long list of guidelines and procedures dealing with the rental of the amphitheater.

The facility formally opened on Sept. 12 at the new Ahoskie Creek Recreational Complex. Since that inaugural event, the town has received several requests to use the facility. That prompted Ahoskie Town Manager **Tony Hammond** and other town officials to develop an amphitheater rental policy. On Tuesday, **Hammond** went over the seven-page policy, one that included these highlights: Reservations are on a first-come, first-serve basis. Any scheduled Town of Ahoskie event or program takes top priority. The amphitheater will not be available if the events/programs interfere with the functions of the town and/or its users because of noise or other factors.

Alcoholic beverages are permitted with the approval of the town manager. In events attended by individuals under the age of 18, one adult chaperone is required for every five persons under that age. Renters are responsible for set-up and clean-up of the facility and grassy seating areas. Renters are entitled to exclusive use of the amphitheater only; they cannot prevent others from using the adjoining park areas. All refuse must be disposed of properly in containers provided. Failure to do so will result in the loss of the rental security deposit. Renters must reimburse the town for any damages done to the facility. Renters must provide portable restrooms set-up at either the north or south ends of the plaza. Contracting for the placement and removal of such restrooms are the responsibility of the user. Due to underground water and electrical lines, driving stakes, fence posts, flag poles, etc. in the ground are not allowed. Reservations must be made by a person age 21 or over. All approved events will require a special use permit and, where applicable, insurance coverage. The amphitheater is available for rental year-round, seven days per week between the hours of 12 noon and 11:30 p.m. Rental fees are \$250 per event for Town of Ahoskie residents or \$500 per event for non-residents. There is an additional \$300 security deposit in both cases. The security deposit will be returned within 21 days following an inspection of the amphitheater facilities and grounds by town staff. Some events may require the presence of police officers for security reasons. The Ahoskie Police Department has sole discretion on whether or not security is needed. If security is needed, a uniformed police officer or officers with jurisdiction in Ahoskie must be utilized. In such cases, a \$44.50 per officer, per hour security fee is required of the user. To receive additional information concerning public use of the amphitheater or to request a rental application, contact the Ahoskie Town Hall at 252-332-5146 or the Ahoskie Recreation Department at 252-332-2064.

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Charles A. Hammond
(Articles are in reverse chronological order)

Roanoke-Chowan News Herald (NC)
February 18, 2008

Council approves rental regulation

Author: Staff Reporter

AHOSKIE – For rent. Last week, the Ahoskie Town Council approved guidelines regarding the rental of the renovated Band Room, located across from the old Ahoskie High School football field. Town Manager **Tony Hammond** explained to council members that rental requests for the Band Room are becoming more frequent.

“We’re getting more and more calls now that the word is out that the Band Room can be rented for private functions,” **Hammond** said. With that in mind, **Hammond** devised a list of rental regulations that were adopted by the council. The Band Room is available for civic, educational and cultural non-profit groups as well as community-related events and individual social events such as birthday parties, wedding receptions, etc.

The facility is available to be rented in four-hour blocks (6-10 a.m.; 10 a.m.; 2 p.m.; 2-6 p.m. and 6-10 p.m.) at a rate of \$75 per block for Ahoskie residents or 150 per block for non-residents. An application must be filled out to reserve the room accompanied by a 50 deposit. Reservations, made at the Ahoskie Recreation Center, are on a first-come, first-serve basis. During discussion of the rental policy, town council members agreed to waive the rental fee for town employees. The Band Room cannot be rented for money-raising programs, events offering items or services for sale (or which include solicitation of clients for products or services) or for meetings of political or religious groups or individuals.

Groups and/or individuals cannot schedule regular meetings, either on a weekly or monthly basis, that could deprive other groups/individuals of use of the room. Meetings are limited to twice per week and those doing so cannot book the room more than two weeks in advance. Exceptions to this particular regulation may be granted to those renting the room for educational/training programs presented by an accredited educational institution.

Notice of cancellation must be made two business days prior to the reserved date in order to qualify for full refund and deposit. The use of tobacco and alcohol products within the meeting room is prohibited. After use, the meeting room and other amenities must be left in good condition. The Town of Ahoskie is not responsible for accident, injury or lost or damaged property resulting from the use of the Band Room or any town-owned facility. Programs sponsored or jointly sponsored by the town have priority over other uses.

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Charles A. Hammond
(Articles are in reverse chronological order)

Roanoke-Chowan News Herald (NC)
January 11, 2008

Annexaton could affect 338 acres

Author: Staff Reporter

AHOSKIE – The Town of Ahoskie is moving forward with its annexation plans. At its Tuesday meeting, Ahoskie Town Council members listened as Will Best of the NC Department of Commerce/Division of Community Assistance (DCA) presented an update of the proposed annexation. He said DCA has studied various scenarios and compositions of the areas.

Best then made a powerpoint presentation, one which analyzed each of the four areas under consideration. Those areas include Colonial Acres, North Catherine Creek Road (north of Malibu Drive), NC 561 East (Harrellsville Highway) and NC 42 West. “All of these areas are part of our original annexation plan,” Ahoskie Town Manager **Tony Hammond** said. “The only difference now is that they have been fined-tuned a bit.”

In his presentation, Best said one area that has undergone major changes is NC 42 West. “Through the calculations stemming from land use, that area was originally denied (for annexation), but we came up with a smaller area that will work,” Best said.

The new annexation plans for that area will take in 15 lots/tracts totaling 17.6 acres. The entire area that will possibly be annexed along NC 42 covers 23.03 acres. **Hammond** said the majority of the parcels/tracts are commercial property, located beyond the Ahoskie Creek about halfway to the Johnny Mitchell Road intersection. He added there were roughly seven-to-eight parcels on the right side of the road and a few on the left. Study Area #1 (Colonial Acres, all residential property) consists of 118 lots/tracts encompassing 135.65 acres. North Catherine Creek Road (Study Area #2, basically an area along the Ahoskie-Cofield Road and the Willoughby Road) has 146 lots/tracts covering 61.9 acres. There is a total of 115.32 acres in Study Area #3 (Harrellsville Highway). There, 53 lots/tracts may be affected by annexation.

Best informed council members that the next step in the annexation process would be to collect data in order to perform a cost analysis. That financial data will assist Ahoskie officials in determining the feasibility of annexing property weighed against the costs of providing town services to those new citizens/businesses. From that point, the Town of Ahoskie may choose to adopt a resolution of intent (to annex) any or all of the areas now being studied. The only action taken on Tuesday was that council members approved the study and recommendations of the DCA and will allow DCA to move forward with the cost analysis. “We’re taking our time and doing things the right way with this project,” **Hammond** said. Hopefully, the timing will be right for the annexation to occur just at the time the expanded wastewater treatment plant comes on line.

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Charles A. Hammond
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WRAL News
Dec 28, 2007

Report Released on City of Creedmoor's \$1.2M Tax Blunder
An IRS report just released reveals that for four years, the City of Creedmoor's formal finance director did not properly fill out federal tax documents.

CREEDMOOR, N.C. — Several years of mistakes could cost Creedmoor taxpayers hundreds of thousands of dollars. “Every single budget within this city government will have to be reduced to pay this debt,” Mayor Pro-tem Tim Karan said.

The city of Creedmoor owed at least \$1.2 million to the IRS, one-fifth their total budget. The IRS report reveals that for four years, formal finance director Eleanor Fowler did not properly fill out federal tax forms. “This just shines a light that unfortunately there are some things that don't get fully disclosed,” Karan said.

Karan said Mayor Daryl Moss and City Manager Bob Schaumleffel knew about IRS inquiries into tax filing problems in 2006, months before other commissioners found out. The mayor admits he is partially to blame for the tax blunder. “The report really speaks to my failure as a leader in this community for not doing all that I needed to do,” Moss said. The report shows the IRS did not receive W-2 forms for several years and the former finance director blamed the mail.

The report also indicates the IRS found Fowler's response unreasonable and warned the city could face substantial penalties. Fowler retired in June and the city has since been getting its finances back in order. “For many, many years Creedmoor has kind of been a mom and pop organization and we kind of grew up overnight,” Moss said.

Karan said part of his frustration is that he has heard this all before. In 2004, the IRS told the city that payments were not being made on time. The city then parted ways with city manager **Charles Hammond**. Karan said Fowler assured him then that IRS irregularities would be fixed. Years later, city leaders have found out that wasn't the case.

The city is currently negotiating with the IRS to lower its penalties. The mayor said he hopes to only pay back about \$200,000. Creedmoor also has a new finance team in place to be sure this doesn't happen again. WRAL tried to speak with former Finance Director Eleanor Fowler, but she did not return our phone call.

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Charles A. Hammond
(Articles are in reverse chronological order)**

Roanoke-Chowan News Herald (NC)
July 13, 2007

Ahoskie declares water emergency

Author: Staff Reporter

AHOSKIE – Despite a bit of wet relief earlier this week, abnormally dry conditions remain for much of northeastern North Carolina. That extended period of drought has prompted Ahoskie officials to declare a water emergency, thus asking its citizens to voluntarily cut back on usage.

During their meeting here on Tuesday, members of the Ahoskie Town Council approved a resolution that calls for voluntary regulations and restrictions. “The overall lack of rain has led to lower water tables,” Ahoskie Town Manager **Tony Hammond** said. “If we don’t ask for voluntary help now, we may be forced to mandate action in the near future.”

Hammond stressed that the current action undertaken by the town is not at the point where the watering of plants and gardens or washing vehicles is prohibited. The voluntary measures are just a means by which the citizens can use simple conservation practices that will help ease the strain on the town’s water system.

As it was stated in the resolution, priority for water usage is given to human consumption, domestic use, sanitation and fire protection. However, due to the prolonged period of below normal rainfall amounts, those priority uses may become jeopardized without certain regulations and/or restrictions.

Therefore, the town has declared a water shortage emergency for the period of July 1 through Oct. 31. Following Town Code (Section 70), Ahoskie officials have determined that the public benefit requires voluntary conservation measures.

Listed below are a few of the conservation measures citizens can use:

Take a five-minute shower instead of a bath.

Do not let water run while shaving, brushing teeth and rinsing dishes.

Only run dishwashers or clothes washing machines with full loads.

Washing dishes by hand saves about 25 gallons.

Install water-saving devices on toilets and showers.

Do not allow children to play with water hoses or sprinklers.

Limit lawn and outside plant watering; then only at night (5 p.m. to 12 midnight to help avoid evaporation loss) and only three times per week.

Consider delaying or sodding of new lawns.

Use a broom instead of water to clean sidewalks, patios or driveways.

Do not fill empty swimming or wading pools.

Install automatic shutoff devices on sprinklers or use an alarm clock or other timing device to shutoff hose-fed sprinklers.

Also, position sprinklers to water lawns to avoid water being sprayed on pavement.

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Limit the number of toilet flushes when possible.

Inspect and repair leaky valves on faucets and toilets.

While waiting for water to become hot, catch water from a sink or tub faucet and use for animals to drink or to water plants.

Hammond said a water conservation flyer will be sent out with the town's July water bills.

Internet – Newspaper Archives Searches
Charles A. Hammond
(Articles are in reverse chronological order)

Roanoke-Chowan News Herald (NC)
September 9, 2006

Council tables drainage project

Author: Staff Reporter

AHOSKIE – Ronald Gatling got his wish. Back in April, Gatling, an Ahoskie Councilman, said he did not want to see the town spend another dime on drainage issues in the West Street/McKinley Drive area before engineering officials assessed the needs of the entire town. During Tuesday's meeting of the Town Council, Ahoskie's elected leaders agreed with their fellow board member.

At the end of a discussion concerning the possibility of spending nearly \$170,000 on the West/McKinley project, council members decided to table that issue in lieu of launching a town wide study on drainage problems. Before a decision was reached, Town Manager **Tony Hammond** updated Council members on the proposed West/McKinley project, one that called for increasing the drainage pipe size to 48 inches on a 1,100-foot ditch running from West Street to Outfall Swamp.

Based upon experience with drainage issues in Ahoskie, **Hammond** recommended that Buddy Godwin/GBS Construction be awarded the contact, one totaling \$168,087. "Even with this improvement, it still will not totally solve the flooding problems in that neighborhood," **Hammond** said. "There remains additional work to be done there."

As it was during the April meeting where the issue was discussed, Gatling was not convinced the town was putting its money to good use. "We've spent \$468,000 over the years in that neighborhood and now we're talking about spending more money on a problem that will persist," Gatling said. "There are other areas of town that need to be studied. If I hadn't been at home last week when (Tropical Storm) Ernesto came through, I would have needed a sailboat to get to my house after all that rain."

Gatling pointed to other areas of town that always flood during heavy rains: Catherine, Maple, Gerock and Ruth streets. "People living in those areas have drainage problems as well," Gatling said. "We need to survey these other areas before we do anything on West Street and McKinley Drive." Councilwoman Elaine Myers said. There was no further discussion on the issue. No motions were heard to authorize the West/McKinley project.

**Internet – Newspaper Archives Searches
Charles A. Hammond
(Articles are in reverse chronological order)**

The Daily Dispatch (NC)
July 14, 2003

Granville's magistrates could be moving

Author: Charlie Richards

OXFORD -- How time changes things is well illustrated by an issue facing the Granville County Board of Commissioners on Monday night. It's the matter of where the Magistrate's Office in south Granville should be.

Several years ago the county kept the office in the Creedmoor City Hall. The city of Creedmoor has upped the rent it will charge for space currently used by sixfold, from \$125 to \$750 a month, starting July 1. That may tempt commissioners to take another look at an old plan to provide a Magistrate's Office in the county's own satellite office building in that southern area.

Creedmoor City Manager **Tony Hammond** has advised the county that "the cost of utilities and office space continues to rise in the current market." He called raising the rent "an unpleasant task."

Hammond also noted that it appears Creedmoor's Planning and Zoning Department will require additional space within 12 months, so "it would be hard" to justify paying market rates for outside space while the town is leasing space in City Hall for \$125 a month.

County commissioners also may find it hard to justify paying market rates for space in Creedmoor when the county has space in its own building. In fact, the original plan for the satellite office building on N.C. 56 adjacent to Vance-Granville Community College's South Campus called for a Magistrate's Office or courtroom. But that function had always been carried out in Creedmoor, the town was planning to provide a court in its new City Hall, and magistrates indicated they preferred to remain in Creedmoor.

The county dropped the court from its building plans. But the building, which already houses a satellite office for the Sheriff's Department and an EMS station, also has a large open space now used as a meeting room. County administrators say it would require modification of the room and would decrease the meeting space, but moving the magistrates to the county building could be an alternative to the higher rent.

Also, in addition to being in the same building as the sheriff's satellite office, such a location would be halfway between Creedmoor police and Butner Public Safety, as well as convenient to the state Highway Patrol, since the county building is near Interstate 85.

Internet – Newspaper Archives Searches
Charles A. Hammond
(Articles are in reverse chronological order)

The Herald-Sun (NC)
December 22, 2002

Lid placed on illegal hunting - Creedmoor police beef up patrols as deer season tempts would-be violators

Author: Hunter Lewis

CREEDMOOR - A little extra dose of law enforcement has made life easier on landowners and tougher on wayward hunters this deer season around Creedmoor. After two landowners complained during a Creedmoor City Commissioners meeting in October, City Manager **Tony Hammond** asked the Creedmoor police to beef up its patrols. For years, police have cruised the confines of town looking for hunters. But since deer season opened in mid-November, officers have traveled a one-mile extension of the town limits, searching rural roads and lakefront properties for trespassing hunters and those hunting illegally from the rights of way of public roads.

In the 15 years he's lived on his rural property off Lake Road, Chris Johnson says he has been spat on, had a shotgun "stuck up [his] nose" and cursed at by trespassing hunters regularly. "They tell me they're gonna whup my. ..." he said. "It's been an excruciating battle. My wife just gets in tears from Thanksgiving through Christmas." But this year has been tear-free so far. Chief Ted Pollard said his department has not issued any citations in the one-mile border outside town, officially known as the extraterritorial jurisdiction. "We haven't caught anybody, but we're actively out looking," he said. Despite the lack of citations, the patrols appear to be working. Johnson monitors the hunters with his CB radio and said would-be trespassers on his 80 acres are more hesitant this season. "[The hunters] watch the local police like a hawk," he said. "The police have been cruising around long enough to keep [the area] hot and at the forefront."

In North Carolina, it is illegal to hunt on someone else's property without permission from its owner, even in the absence of a no-hunting sign. Using dogs to hunt is legal in Granville and Person counties, as it is in most parts of the state. Penalties for trespassing and illegal hunting range from a mandatory court appearance to \$25 fines with \$100 court fees payable by mail. State lawmakers banned the practice of running dogs in Durham County in 2001 under pressure from landowners and county officials. Since then, hunters have moved farther north to rural parts of Granville County, including outside Creedmoor. But wildlife officials and hunters alike say the practice of running dogs is a dying tradition. As sprawl moves in, wild spaces diminish. Fewer public woods and fields mean dogs will run across more private land, leading to more unfriendly encounters between landowners and hunters. Earlier this month in Person County, a man running dogs with several others was struck by buckshot in the leg and thumb. Terrell Holloway, who was hunting in the same area, was issued a citation for hunting from the roadway. But Holloway was not responsible for wounding the Person County man, who was hospitalized briefly, authorities said. Though this has been a quiet deer season so far, Johnson worries trespassers will throw caution to the wind during the final week of the season, which ends Jan. 1. "They've got very little to lose this late in the season," he said.

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Charles A. Hammond
(Articles are in reverse chronological order)

The Herald-Sun (NC)
August 24, 2002

Creedmoor aims to control growth - Leaders worry new building could outpace water capacity

Author: Hunter Lewis

CREEDMOOR - As Triangle developers seeking open spaces and relatively cheap building fees flock north to Creedmoor, city officials want to be sure the resulting growth remains in check. On Thursday night, officials held a water and sewer workshop about Creedmoor's ability to keep pace with growth. With 300 new lots slated for construction over the next few years, the growth may outpace the water and sewer capacity, officials say.

The city is nearing completion of a \$1.2 million sewer expansion, including upgrading its pump stations and sewer lines. It also plans to dredge Lake Rogers, where the city gets its drinking water, once \$1.5 million is raised through a one-year special assessment on those buying city water. On top of their monthly water bill, the special assessment costs residents 1.5 percent of their bill and water users outside the city pay 3 percent. But the water plant needs a makeover, too, and officials estimate the project to increase filtration - as yet without funds - could cost up to \$3 million.

Mayor Darryl Moss expects the projects to help address the growth. But he cautions the city will keep careful watch on building in the future. "Personally, I'm a slow-growth advocate," he said. "I'm not interested in seeing Creedmoor grow to be a Cary. That's not my vision for Creedmoor." Instead, Moss envisions a community of 4,000 to 5,000 folks in 20 years. Creedmoor currently has about 2,000 people. It's realistic," he said. "I'm not real interested in living in a real large community." Moss and City Manager **Tony Hammond** stressed that water and sewer resources will make do for the "next several years." But once construction on the 300 lots is completed, the city might start to feel the utilities pinch, they said. "If things continue to get worse, we may put a moratorium on [building]," Moss said.

Last month, the city commissioners and local developers butted heads over what the construction industry deemed unfair building fees. The new fee schedule added about \$5,000 to the cost of a \$150,000 home, and developers must make graduated payments. Despite their attempts to regulate growth, **Hammond** said the fees would not stop developers from looking elsewhere. "The fees are not going to stop [developers]," he said. "It's still a pretty good deal. [The fees] are certainly not any different than the rest of them. "[The commissioners] certainly don't want to stifle the growth," he said. "But they also want to be able to regulate where and how fast it grows. Let it grow, but let it grow at a rate where we can serve it. We can't let the growth come here before we have the alternative source."

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Charles A. Hammond
(Articles are in reverse chronological order)

The Herald-Sun (NC)
July 25, 2002

Lake Rogers drops, Creedmoor faces water restrictions next week

Author: Hunter Lewis

CREEDMOOR - City residents should expect mandatory water restrictions next week if Lake Rogers' water levels continue to plummet. Under voluntary conservation since last month, the city will enact stiffer restrictions in a special meeting sometime next week, said City Manager **Tony Hammond**. The mandatory restrictions will last for three months or until the lake level returns to normal.

In a presentation before the commissioners Tuesday night, Water Plant Superintendent Linwood Hicks said severe drought conditions have dropped Lake Rogers 18.5 inches below its normal level of 280.4 feet. The lake's boat ramps were closed earlier this month. Commissioner Patrick Robertson called for a motion to put the restrictions in place, but it failed because the commissioners nearly drowned in specifics of the restrictions. Last summer, the commissioners passed a conservation ordinance that defined the mandatory measures, which make it unlawful for city residents to:

- * Water lawns, gardens, shrubs, flowers and trees.
- * Wash automobiles including commercial washing.
- * Serve water to restaurant customers unless the water is requested.
- * Wash down streets and driveways.

But Robertson asked to amend the watering and washing measures so that residents could hand water their gardens, trees and shrubs if necessary. He also asked to allow commercial washing so the local laundromat and the lone car wash could remain in business.

Commissioner Joel Cross owns the car wash, and he said Wednesday that the voluntary restrictions had already hurt business. "When we tried voluntary measures, it cut down my business by more than half," Cross said, adding that he didn't know if the dry weather or slow economy was to blame. "I question whether we're ready for mandatory or not," he said. But Cross said he would be the first person to put up a closed sign if the restrictions were imposed. In Durham, businesses that require water can apply for exemptions to the mandatory restrictions. Once the restrictions are imposed, residents may be fined up to \$50 and charged with a misdemeanor for illegal watering, and the mandatory measures will last for at least three months.

In his presentation, Hicks also said the city must upgrade its sewer and water capacity. "We may be in worse shape than we thought we were," he said. Once the city's 300 planned new homes are built, the water plant will treat 410,000 gallons a day. The plant's capacity is 460,000 gallons a day, but Hicks said the state recommends keeping 15 percent of the capacity in reserve for emergencies such as water line breaks or flushing water mains.

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Charles A. Hammond
(Articles are in reverse chronological order)**

The Herald-Sun (NC)
January 2, 2002

Creedmoor board lauds new hire - Officials: Incoming city manager's experience, education set him apart

Author: Artelia Covington

CREEDMOOR - Experience and a master's degree helped Creedmoor's new city manager get the job, officials said Monday.

Charles "Tony" Hammond, the former town manager for North Topsail Beach, starts work Wednesday. He was one of 34 candidates. "We decided to go with **Hammond** because we liked his experience, and it was a plus that he had a master's in public administration," Mayor Darryl Moss said.

The Board of Commissioners also liked that **Hammond** would bring some knowledge of a regional water and sewer authority to the table, since Onslow County has a regional water and sewer authority and Granville County is close to forming one, Moss said.

"When we were deciding on who to hire we were looking for them to have experience in a lot of areas, including public safety, infrastructure and water and sewer," Moss said.

Hammond will earn \$55,000 a year in Creedmoor. He will oversee about 30 employees and a \$1.3 million annual budget. The 52-year-old native of Fernandina Beach, Fla., was town manager of North Topsail Beach for three years. There he oversaw 25 employees and an annual budget of \$4.4 million.

Hammond replaces City Manager Merle Edwards, who held the post for 20 years. Topsail Beach is a resort community of 843 people, while Creedmoor has a population of 2,292.

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Charles A. Hammond
(Articles are in reverse chronological order)

Star News (NC)
January 24, 2001

SAND PUSH CRITICIZED; Coalition seeks bulldozing ban for shorelines

Author: Brian Feagans

Pushing up ridges of sand after hurricanes has become so common along the North Carolina coast that many towns have their own bulldozers. But a coalition of seven environmental groups is asking the Coastal Resources Commission to silence the earthmovers and ban beach bulldozing when the CRC votes on the issue as early as Friday. They say the work scrapes away ghost crab habitat and wastes regulators' time without adding any real protection against storms. "It is clear that beach bulldozing is little more than a 'feel-good' activity for homeowners to have the illusion that they are protecting their property in the aftermath of a storm," N.C. Coastal Federation Executive Director Todd Miller wrote in a Jan. 19 letter to the 15 CRC members.

Coastal town officials defend the pushed-up ridges of sand not as a barrier against strong storms but as short-term protection for roads, homes and utilities. "In a lunar high tide, if we didn't have the berm, it would flood the state highways," said **Tony Hammond**, town manager at North Topsail Beach.

Owners of beachfront cottages from Pender to Brunswick County also hire construction crews to plug weak spots in dunes, sometimes several times in one winter. They anchor the dunes with sand-trapping sea oats, hoping the sand ridges will buy them enough time to get a federal beach-widening project where sand is pumped onto the shoreline.

The CRC will hold a public hearing on the issue Thursday in Kill Devil Hills and could vote as early as Friday to modify its permitting system for beach bulldozing. The governor-appointed panel has proposed offering 30-day permits rather than the current three-year permits.

The smaller window would make it easier for the state and local officials to monitor the bulldozing to ensure that homeowners aren't abusing it, said Charles Jones, assistant director for permitting and enforcement at the N.C. Division of Coastal Management. "We found that people were trying to build a bigger and bigger barrier to protect their structure from damage," he said. "The intent is only to repair damaged sand dunes."

The proposal would leave in place a restriction on scraping no deeper than one foot on the beach. Those receiving permits also could request a 30-day extension if the work isn't done within the original 30-day period. A 1998 study of 10 sections of Bogue Banks in Carteret County concluded that beach bulldozing doesn't offer significant protection during hurricanes, northeasters or minor storms. The scraping neither helps nor hurts the beach-dune system, the University of North Carolina researchers concluded.

They found that while the work didn't harm fish or shorebirds, it did lead to declines in ghost crab populations that needed months to recover. CRC member Courtney Hackney said the

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proposed 30-day permit should prevent the repeated scraping that can wipe out the crabs.

Dr. Hackney, a marine biologist at the University of North Carolina Wilmington, said he understands the Coastal Federation's contention that the permit sends the wrong message to homeowners along the shore. But he said the practice isn't damaging enough to warrant a ban and appears to offer piece of mind. "It's just remarkable how people are so panicked until that little bit of sand goes up there," he said. "It's an emotional issue, not scientific."

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Charles A. Hammond
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StarNews (NC)
October 9, 2000

TOPSAIL, HOLLY RIDGE; 4 towns may use 1 CAMA official; Idea could save time and money

Author: Willaim Davis

TOPSAIL ISLAND - The three Topsail Island towns and Holly Ridge each have an employee on their payroll handling Coastal Area Management Act permitting. Some in the town governments have begun asking if they could save time and money by combining their efforts under a single person.

During their last four-town meeting, town officials broached the idea of merging their CAMA programs, creating a single entity to handle the whole island and Holly Ridge, said Topsail Beach Town Manager Larry Bergman. Although the idea is in its early stages, Mr. Bergman said the idea has promise, but he's waiting until he sees the final numbers before he can say if he supports it. Because most of the island lies a short distance from both the ocean and the Intracoastal Waterway, almost any construction requires a CAMA permit. Local officers cut down on the time it takes for the paperwork to go through. Without a local officer, residents would have to rely on inspectors from the N.C. Division of Coastal Management's Wilmington office.

Each town funds its own CAMA officer. The state trains and supervises them, but they are considered town employees. In theory, one officer could handle the workload for all of the towns, Mr. Bergman said. "It takes a lot of administrative time. The field work is pretty quick usually," Mr. Bergman said.

North Topsail Beach Town Manager **Tony Hammond** supports consolidation among the towns. By combining efforts, they can save a lot of money, he said. While he did not know who broached the idea this time, he said North Topsail Beach officials have talked about combining the CAMA program in the past. "It's kind of been batted around for a couple of years," **Mr. Hammond** said.

While the town has had problems with its local CAMA officer in the past - the decisions of a former CAMA official led the town into two lawsuits, and North Topsail Beach is being put on probation by the N.C. Division of Coastal Management - **Mr. Hammond** said the town's sole interest in combining efforts is to save money. The four towns should go even further than just combining its CAMA officer, said North Topsail Beach Alderman Otis Sizemore. He said the towns should consider combining other expenses. "We need to do more things on the island as three towns as one," Mr. Sizemore said.

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Charles A. Hammond
(Articles are in reverse chronological order)

StarNews (NC)
August 17, 2000

Loss of well puts town on tight water rations

Author: William Davis

Every year, around a dozen new houses pop up on Topsail Beach. And each new house puts a little more pressure on the town's limited water supply. Topsail Beach draws its water from three wells on the island, according to Town Manager Larry Bergman. A fourth well will soon be filled with concrete, since salt water leaked into the water. With the loss of that well, the town has enough water to supply its immediate needs and little more.

It will be two years before residents notice any water shortage, said Public Works Director Tom Wooten. Right now, the water supply is adequate for normal needs, with residents not seeing any problems. "As far as they are concerned, they don't know they are without a well," Mr. Wooten said. Topsail Beach is considering how to get more water onto the island. Mr. Bergman said the town does not want a temporary fix, but a solution that will serve for decades. "We could keep limping along. We could drill another well," Mr. Bergman said.

Long-term solutions will be expensive. The town is seriously considering trying to get water from one, or more, of three sources: a proposed Pender County system, Surf City and Onslow County. The town already has a tap into Surf City's system. During the recent fire at the town's south end, Mr. Wooten opened the tap to Surf City to get more water for firefighters. He said the town probably could have fought the fire without Surf City's water, but he thought it best to be safe.

Surf City can help out in emergencies, but it does not have the water to supply Topsail Beach, said Surf City Town Manager Pat Thomas. In the future, though, Surf City may drill new wells to supplement the two it has on the mainland and have enough water for its southern neighbor.

The Onslow County water system runs to the island from a line beneath the bridge at the north end of the island, said North Topsail Beach Town Manager **Tony Hammond**. The line runs to the county line, supplying the Onslow County section of Surf City. From there, it connects into Surf City's water system.

Right now, Onslow County does not have the capacity to supply Topsail Beach either, said Billy Farmer of the Onslow County Water Department. The county plans to add new capacity to its system, but it will be two years before it could supply the town. "In the summer months, we're really serving everyone beyond our means," Mr. Farmer said.

If the town goes with Pender County, the wait may be just as long, if the project even proceeds. Pender County Assistant County Manager Andy Hedrick said the county may expand its proposed water system to Hampstead, but the board has not approved even a study for the expansion. Even if the board approves it, it will take at least three years.

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If the line runs to Hampstead, Topsail Beach could run a line across the inlet to tap into the system. The cost of that line could exceed \$1 million, Mr. Bergman said.

As a final resort, the town could build a water treatment plant, but the cost and problems with waste disposal make that option problematic, according to Mr. Bergman. He said a reverse osmosis plant, which could treat the water from the town's current wells, could cost millions.

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Charles A. Hammond
(Articles are in reverse chronological order)**

The Herald-Sun (NC)
July 30, 2000

N. Topsail off hook on environmental violations - A seawall and a paved road in a wetland are among building projects that broke state rules

Author: Associated Press

NORTH TOPSAIL BEACH - A town that was on probation for violating coastal development rules is off the hook, but a state commission may seek legal action against two homeowners whose property violates state rules. Violations include a seawall built at a North Topsail Beach resort hotel and a 500-foot paved road built in a wetland, both against state rules. "It seems to me that this is the most blatant disregard of our regulations that I have seen in my time," said commissioner Ernest Larkin. Owners of the Villa Capriani resort and the road, two separate properties, have refused to remove the structures, said state Coastal Resources Commission spokesman Brian Long, and the state issued continuing violation notices.

The state wants the property owners to restore the sites to their original conditions, tearing out the road and the seawall. If they do not comply, they could be fined up to \$2,500 a day until they either reach an agreement with the division or restore the sites, Long said. State lawyers could take the property owners to court. The commission voted Friday to take the town of North Topsail Beach off a three-month-long probation over the problem.

Commissioner Melvin Shepard said one problem is that the ordinances of towns like North Topsail are more lenient than state law. North Topsail Beach is re-evaluating its ordinances to comply with the law, said town manager **Tony Hammond**.

Hammond said the original owner of the road built it after he received permission from Terri Potts, the town's permitting officer for the state Coastal Area Management Act. Potts has said she never gave permission to build a road, just to make a path so the owner could get to the property.

Hammond said the town allowed the seawall to protect a swimming pool because Potts, after discussions with state officials, thought she had the right to issue a permit. But CAMA Director Donna Moffitt said that her staff would never authorize a seawall or a paved road in wetlands.

Another problem involved a homeowner who was allowed to expand a house into an ocean setback area. Potts has left North Topsail for a job in Lake Lure. Commissioners said they took the town off probation because the new permitting officer Sue McLaughlin worked to correct problems. The panel said the officer still would have to work under supervision of the state's CAMA permitting office. If the permitting officer was removed from the town, it couldn't issue permits as quickly.

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Charles A. Hammond
(Articles are in reverse chronological order)

Charlotte Observer (NC)
March 31, 2000

DUNE VEGETATION SHORTAGE MAY BE OPENING FOR TOBACCO FARMERS

Author: Associated Press

When North Topsail Beach went looking for 700,000 plants to anchor its hastily rebuilt 13-mile dune line after Hurricane Floyd, the town struck out.

Officials found that the few species that will reliably thrive in the harsh beach environment were not easy to come by. "We looked up and down the coast of South Carolina, North Carolina, even Florida, but there is such a great demand for beach grass after all these storms that there just isn't any available right now," said Town Manager **Tony Hammond**. "The quantity just isn't there."

Topsail Island's other hurricane-battered towns, Surf City and Topsail Beach, were able to meet their needs, but not easily. "We got by, but that doesn't mean we couldn't have used more," said Janet Chamblee, interim town manager for Surf City.

Officials at the Pender County Agriculture Extension Service office think the shortage of dune vegetation may present a market opportunity for hard-hit tobacco farmers. With an additional 17 percent reduction this year, the flue-cured tobacco quota is just half what it was in 1997, according to state Department of Agriculture figures.

While raising sea oats and other beach plants won't generate the revenue tobacco did, the program could at least help soften the blow as farmers search for new crops, said Mike Jones, Pender County extension director. "We've searched long and hard, but there just isn't a crop to replace tobacco," he said. "But we think this could offer a real opportunity."

A pilot program, which will initially include only two tobacco farmers, will begin this fall with the harvesting of seeds from sea oats on the dunes of Surf City and Topsail Beach. "We think providing beach plants from local stock will offer a better-quality plant than those from other areas," said Matt Blackwell, an agriculture extension agent.

The seeds will be germinated in greenhouses used by tobacco farmers to grow their tobacco plants. Four to six weeks later, the 1 million to 1.5 million plants the extension office hopes to grow would be returned to the Topsail Island dunes. "There, they would act as parent stock for future plants," Blackwell said. "Then, each year, seeds would be harvested from these plants."

One Pender County farmer already growing beach plants warns that they aren't the cash crop some might think. "I'm not being selfish trying to keep people out of the business or anything like that, but there just isn't that much of a market out there," said Eric Lee.

Lee owns Lee Farms and Nursery in the Long Creek community, about seven miles west of Rocky Point. He has been growing beach grass for 17 years but making money on it only for

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four years. "If we had to depend on the beach grass, we wouldn't be able to pay the taxes on my land. You can't count on it every year," he said.

Lee said when he started in the beach grass business, he was making \$70 per 1,000 plants. Now, he makes about \$35 per 1,000 plants - when he can sell them. "It's not like shrubbery, which people are always looking for," Lee said. "There's only so much beachfront, so many sand dunes out there."

Some years, Lee has had to burn off his 25 acres because there wasn't a market for the beach grass, but he has found the plant useful as habitat for - game birds he raises. Moreover, growing competition from factory farms in Florida and New Jersey has driven down prices, Lee said.

Blackwell believes that a growing realization that a healthy dune network is a way to protect their beach communities could help farmers. "This is a valuable resource they are going to need year after year, whether there is a hurricane or not," he said. "The plants that are on the dunes now aren't going to last forever."

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[CB&A Note: Only the section related to the candidate's town was included.]

StarNews (NC)
September 21, 1999

COUNTING THE DAMAGE; Early estimates show huge toll

Author: Staff Reporter

On North Topsail Beach, the cost to clean up debris and repair the town's protective dune is estimated at \$3 million, according to a preliminary assessment by the town. An additional \$300,000 is needed to repair roads in the town, which is now open to residents, preferably with four-wheel drive vehicles. Private property damage estimates were not available from Onslow County.

By Monday, power was restored throughout the town, and water service had been restored to all but about 500 homes on the north end of the island past the St. Regis Resort, where water lines were heavily damaged.

Town Manager **Tony Hammond** said the Onslow County Water Department is negotiating bids to fix the damaged lines, which will take at least 10 days to repair.

The storm destroyed 10 mobile homes, heavily damaged 54 homes - several that were undermined by the ocean. Another 704 homes have minor damage, **Mr. Hammond** said. Topsail Road was erased in the storm, as it carved inlets through New River Inlet Road and a section of N.C. 210. The roads are currently being filled in and are expected to be temporarily repaired by later this week.

A curfew in effect from 9 p.m. to 7 a.m. will likely be lifted today, **Mr. Hammond** said.

Surf City had minor damage to 310 homes, but no dollar estimate was available Monday. Two apartments had major damage, while one garage and half of the municipal crosswalks were destroyed.

Residents there are asked to separate their storm debris before placing it outside for pickup. Specifically, large pieces of furniture, sand, and tree limbs and leaves should each be placed in separate piles on the right of way near the street, but not on the pavement. Debris should not be placed on piles of sand, so the sand can soon be relocated to the beach.

In Topsail Beach, town officials on Monday estimated that damage to homes and buildings will likely total about \$8 million, but they were unable to provide a breakdown of the preliminary assessments.

Internet – Newspaper Archives Searches
Charles A. Hammond
(Articles are in reverse chronological order)

StarNews (NC)
June 21, 1999

NORTH TOPSAIL BEACH; Storms gone but still show on budget

Author: Victoria Cherrie

NORTH TOPSAIL BEACH - There is no shortage of interest in spending time on this barrier island, where sunsets melt into the horizon and visitors don't have to fight for a parking space at the beach. But three hurricanes in less than a decade have eroded the cash flow of the quiet beach town, prompting administrators to consider increasing property taxes and slashing next year's \$1.7 million budget.

Possible cuts could kick building inspections and zoning administration back to Onslow County, which handled that essential work before North Topsail became a town. Although eliminating the departments could help solve the town's fiscal headaches, town leaders want to maintain building standards on the island, which was a problem when county inspectors handled the work a decade ago.

Having ample money for recovery after future storms is also critical to the island, which gets little federal flood insurance and won't qualify for major beach renourishment programs. The Board of Aldermen will weigh the issues before approving the town's budget by July 1. A budget workshop is scheduled this week. The 1999-2000 budget is up from last year's \$1.6 million spending plan and includes a 6 cent property-tax increase.

Town Manager **Tony Hammond** said the boost, from 39 to 45 cents per \$100 valuation, will build the town's fund balance, which has fallen below the state's requirement for beach communities. Other budget cuts will also help pad the fund needed to pay for storm recovery.

State law requires beach communities to keep 35 percent of their annual budget in the fund balance at all times. But the blows of the three hurricanes have depleted the town's coffers, forcing administrators to find ways to save. Before Hurricane Bonnie last August, the town's fund balance was \$1.5 million. It now is less than \$500,000, **Mr. Hammond** said. A 6 cent tax increase and eliminating two positions will allow the town to put \$33,000 into a contingency fund but not provide enough money to restore the account to its prestorm level.

Mr. Hammond said if the town wants to raise more money for that rainy-day fund, officials will have to fire more workers and have a higher tax increase. Building inspections and zoning administration are being targeted for cuts because the departments are not self supporting and the work could be handled by Onslow County, said John Starzynski, the town's building inspector.

Alternatives for saving include getting rid of the town's building inspector and Coastal Area Management Act planning and zoning administrator. The savings would be about \$120,000 a year but the town would be at the county's mercy, **Mr. Hammond** said. The town would also lose revenue from building inspections, permits and CAMA grants, he said.

Internet – Newspaper Archives Searches
Charles A. Hammond
(Articles are in reverse chronological order)

Onslow County handles building inspections in the towns of Holly Ridge and Richlands as well as such unincorporated communities as Verona and Sneads Ferry. Jacksonville and Swansboro have their own departments, said Jeffrey Hudson, deputy county manager.

Onslow County has a chief building inspector and five inspectors, including one position that was added in July due to cope with growth, Mr. Hudson said. The county also has a CAMA officer who works in the planning department, he said.

Mr. Hudson said it is unclear whether the county would have to hire additional personnel to cover North Topsail Beach if the town decides to close its building inspections department. Other alternatives for saving are for the town to contract a state certified building inspector or consolidate the town's inspections and zoning into one department.

Having enough money to recover from storms is critical in North Topsail, where the federal government will not insure buildings against flood damage, build roads, bridges or restore beaches on about half of the 13-mile island known as the COBRA zone.

The zone was established in 1982 when Congress adopted the Coastal Barrier Resources Act, aiming to get the federal government out of the business of subsidizing unwise barrier island development.

From Hurricane Bertha in 1996 to Hurricane Bonnie last year, North Topsail has spent more than \$3 million of town money on recovery, said Terri Potts, the town's CAMA, planning and zoning administrator. An additional \$250,000 from grants has been spent to replenish a berm built after Hurricane Fran to protect structures and roads from storm surges.

Though the town has replenished dunes by pushing up sand and planting beach grass, officials have not embarked on any major renourishment projects. The biggest reason is a lack of money, which is why the town, in addition to considering budget cuts, is courting the idea of hiring a Washington, D.C., lobbyist.

The town this week met with Howard Marlowe to discuss his lobbying for federal funds for major renourishment projects. Mr. Marlowe was recently hired by Ocean Isle Beach. The Brunswick County town pays him \$2,000 a month plus about \$200 for operating expenses for his efforts in Washington, where he bridges the gap between federal and state employees and makes sure the town's wishes are heard, said Ocean Isle Beach Town Manager Greg Taylor. The town is working toward a 50-year beach renourishment project that will include berm construction and maintenance every three years, he said.

Mr. Hammond said North Topsail hopes to make headway in its efforts to get federal money for the beaches here, but in the meantime the town must make sacrifices to assure there is enough money around in case of future storms.

To draw more revenue, the building inspector said he recently raised building permit fees from

**Internet – Newspaper Archives Searches
Charles A. Hammond
(Articles are in reverse chronological order)**

\$30 to \$40 per square foot of construction. "But they would have to go up astronomically for our department to be self supporting," he said.

That will never happen because the town has little commercial development, which draws the most money, he said. The Scotch Bonnet, Salty's and Ocean City piers were destroyed during Hurricane Fran. Only a few businesses operate on the island.

There are about two commercial tracts remaining in the town, one on Sea Gull Lane and another on the south end of the island where a restaurant used to be, said building inspector John Starzynski. Both tracts are for sale, he said.

Internet – Newspaper Archives Searches
Charles A. Hammond
(Articles are in reverse chronological order)

StarNews (NC)
January 4, 1999

PROTECTING DUNES; N. Topsail restricts off-roaders

Author: Cece Von Kolnitz

With a \$20 permit from Town Hall, Doug Medlin can drive his car onto the beach at Surf City when he feels like fishing. Most fishermen on North Topsail can't do that anymore. This month, the town's Board of Aldermen voted to restrict driving on the beach to commercial fishermen and the handicapped. The formal ban on beach driving means North Topsail joins a growing list of beachfront municipalities that restrict or prohibit driving on the sand. Many fishermen resent the legal restrictions, since they use the beaches as a road to bring their equipment to the waves. "Fishing from the surf is very important to anglers in North Carolina," said Mike Street, statistics chief with the N.C. Division of Marine Fisheries. "Thousands and thousands of people fish that way."

The North Topsail board first banned driving on the beach in 1994 and renewed the ban in 1995, said Town Manager **Tony Hammond** - but neither vote was put in writing. **Mr. Hammond** said since then, most fishermen on North Topsail have just assumed driving isn't allowed and stayed off the beaches. "I think they need to be able to drive on the beach for fishing," said Mr. Medlin, owner of East Coast Discount Sports, a store selling fishing tackle and bait in Surf City. "As long as it's done properly, there's no damage." Joe Vecchione, a member of the North Topsail Board of Aldermen, agrees with the board's decision. He said the town needs to focus on fixing storm-damaged dunes. "We have so many things to do on the beach as far as dune renourishment," Mr. Vecchione said. Beach driving is "not necessary." Mr. Vecchione said he has received 30 to 40 calls from people who are against driving on the beach.

In Surf City and Topsail Beach, fishermen can drive on the beach as long as they have a four-wheel-drive vehicle and a permit. Permits in Topsail Beach are available at Town Hall for \$20. Dathan Shows, Topsail Beach town manager, said fishermen are only allowed to drive on the southern end of the beach, where there are few homes and a small amount of pedestrian traffic. Driving is not allowed at all on Wrightsville Beach, said Tony Caudle, town manager. Mr. Caudle said handicapped visitors can use a sand chair, equipped with balloon tires, to reach the shore. Within the town limits of Carolina Beach, only emergency and town vehicles are allowed on the beach, Calvin Peck, town manager, said. Fishermen can drive without permits on the five miles of beach at Fort Fisher State Recreation Area, which reopened this month to visitors. The area is closed to driving when sea turtles are nesting.

**Internet – Newspaper Archives Searches
Charles A. Hammond
(Articles are in reverse chronological order)**

Charlotte Observer (NC)
November 27, 1998

SPEEDUP ON SAND BERMS TENTATIVELY APPROVED

Author: Associated Press

Coastal towns would be able to move sand into emergency berms after major storms under a new rule tentatively approved by coastal regulators.

Towns still would not be able to automatically start bulldozing after a major storm. The new policy would set up a system for them to get waivers from the state. The N.C. Division of Coastal Management still would have to consult with federal and state wildlife officials before the waivers were granted for a particular town or homeowner.

The change comes in response to complaints from beachfront homeowners and town officials who say they were left exposed and vulnerable in the wake of Hurricane Bonnie. ``There were places where we needed to put sand right away, and here we are 90 days later still bulldozing," said **Tony Hammond**, town manager of North Topsail Beach. ``High tide went right up to the roadside in some places," he said. ``There's so much red tape you have to go through."

Normally, beach towns have to go through an extensive permitting process to bulldoze sand to protect homes and businesses. The rules are primarily designed to protect the nests of endangered sea turtles.

After Hurricane Bonnie, the Coastal Resources Commission passed a temporary rule allowing the permits to be waived in emergencies. Its members voted last Friday to make the change permanent. Bonnie gobbled up dunes along most of North Topsail Beach, a third of the berm in Topsail Beach, almost a mile of dunes in Surf City and an escarpment at the southern stretches of Figure Eight Island.

Topsail Beach illegally pushed up an emergency berm after the hurricane and drew a violation notice from regulators. Town officials said they needed to push up some measure of protection as soon as possible; Hurricane Danielle loomed in the Atlantic. In North Topsail Beach, officials followed the law. But a bulldozer had to wait weeks before it could dig into the beach and plug 27 gaps in the berm line.

Internet – Newspaper Archives Searches
Charles A. Hammond
(Articles are in reverse chronological order)

StarNews (NC)
August 5, 1998

Police chief quits in North Topsail Beach

Author: Luther Caldwell

North Topsail Beach lost its fourth police chief in eight years when Gunnar Matthews resigned Tuesday.

After serving as the department's top officer for the past three and a half years, Chief Matthews said he has decided he needs a change. The 34-year-old was one of the first police officers North Topsail Beach hired when it incorporated in 1990, and he has been with the department ever since, working his way up from patrolman to chief.

Chief Matthews said he has been thinking about making a change for the past two or three months and began sending out resumes roughly six weeks ago. He said he hopes to enter corporate policing, a change that promises more money and opportunity.

Assistant Chief Daniel Salese III will take command of the department today, town Manager **Tony Hammond** said.

Asst. Chief Salese will serve as interim chief for six months, at which time the town will decide whether to make his appointment permanent, **Mr. Hammond** said.
"I'm going to evaluate the chief," **Mr. Hammond** said.

Asst. Chief Salese will lead a department of eight full-time and six part-time employees. Salese has been a member of the North Topsail Beach Police Department since November 1995.

Research Compiled by: Chris Nestman
Colin Baenziger & Associates



Section 7

David D. Molgaard

*Fernandina Beach
City Manager Candidate Report*

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Cover Letter and Resume

DAVID D. MOLGAARD

PHONE: 304.389.2011
EMAIL: davidmolgaard23@gmail.com

244 Whispering Woods Rd
Charleston, WV 25304

July 6, 2023

Mr. Colin Baenziger
Colin Baenziger & Associates
Via email: Recruit28@cb-asso.com

Re: Fernandina Beach, FL -- City Manager recruitment

Dear Mr. Baenziger:

I write to express my interest in being the next city manager to serve the City of Fernandina Beach, Florida. Please find a copy of my current resume attached to this communication in support of my application for this position.

I am an accomplished results-driven professional with over 15 years of local government experience turning policy directives into organizational action as the city manager for the City of Charleston, West Virginia. Charleston is the largest municipality in the State of West Virginia and, as the seat of state government and commerce, its day-time population swells far beyond its residential population. Consequently, so does the challenges and demand for city services. I am happy to say that I had a great working rapport with our mayor and city council throughout my tenure and that we navigated our challenges very well together.

As Charleston's city manager, I oversaw a general fund budget of \$100 Million, a workforce of 800, and an organization with approximately 30 departments and departmental sub-units. I developed and supported talent from within the organization and together we worked to create efficiencies in service delivery, improve working conditions for our employees, creatively address budgetary cost drivers, advance strategic planning initiatives, and implement impactful public work projects. I sat as the financial advisor to the Charleston Sanitary Board and regularly interfaced with other governments, agencies, and boards to advance our common causes and build cooperative relationships. I served on the legislative committee of the West Virginia Municipal League and held leadership roles, including that of president, in the West Virginia City Management Association, an affiliate of ICMA.

I am eager to return to my passion of local government service with a renewed enthusiasm for efficient and sustainable community building as the next City Manager of Fernandina Beach. Additional details about my background are contained in the accompanying resume, but I would welcome the opportunity to discuss my qualifications for this position more fully. Thank you for your time and consideration.

Sincerely,



David D. Molgaard

DAVID D. MOLGAARD

Charleston, West Virginia

PROFILE

Seasoned operations administrator with substantial local government and legal experience.

Skilled in organizational leadership, budgeting and strategic planning, financial reporting, managing complex funding sources, policy analysis and formulation, contract negotiations, economic development, project administration, consensus building and public relations.

Also skilled in proposal development, grant administration, governmental contracting, human resources, employee relations, talent development, personnel supervision and performance evaluation, property acquisition and development, facility management, information systems and technology, cost-containment, risk management, and insurance matters.

CONTACT

PHONE:
(304) 389-2011

EMAIL:
davidmolgaard23@gmail.com

LINKEDIN:
[linkedin.com/in/david-molgaard](https://www.linkedin.com/in/david-molgaard)

EDUCATION

J.D., Juris Doctorate
The College of Law
West Virginia University

M.S., Industrial Labor Relations
The College of Business and Economics
West Virginia University

B.A., English
The College of Arts and Sciences
West Virginia University

PROFESSIONAL EXPERIENCE

Bailey & Glasser, LLP
Chief of Staff and Firm Administrator

Charleston, WV
2/2019-2/2023

Recruited to facilitate administrative and organizational change initiatives for a multi-jurisdictional law firm concentrating in complex litigation and corporate transactional work.

Provided business, administrative, and integrative leadership support through a restructuring and period of significant growth for the firm: 70% increase in attorney and staffing levels and the addition of 8 new office locations (from 11 to 19) over four years.

General Management, Staffing, and Administrative Support.

- Supported and advanced Adizes Methodology accelerated change initiatives as a Participative Organizational Council (POC) Administrator and trained Adizes Integrator.
- Liaised with practice group leaders, management committees, and attorneys to optimize operational support and effectiveness.
- Supervised paralegals and other non-legal staff; conducted performance and compensation reviews.
- Procured and negotiated service agreements for court reporters, talent recruiters, and other support services.
- Provided oversight and administrative support for Marketing and Business Development functions and activities.
- Oversaw training and mentorship programs.

Human Resources Administration

- Oversaw human resource functions, including supervision of department director, office managers, recruitments, on-boarding and training, and procurement and administration of welfare benefit plans (including migration to a high retention captive healthcare plan).
- Provided guidance and oversight to Diversity, Equity, and Inclusion initiatives resulting in Mansfield Rule Certification for Mid-Sized Law Firms.

Technology Administration

- Developed and administered IT Budget.
- Oversaw IT functions: directed Helpdesk and vendor managed IT services.
- Managed procurement of computer hardware and selection, contract negotiation and implementation of software services including MS Office 365, case management and document management systems, CRM, legal research services, and associated projects to migrate data from on-prem to cloud-based platforms.
- Developed gap policies and procedures and managed audit activities to obtain SOC 2, Type 1, certification relative to the Trust Services Criteria for Security and Confidentiality for a service organization.

DAVID D. MOLGAARD

REPRESENTATIVE BOARDS & AWARDS

West Virginia City Management Association (ICMA Affiliate)
President, Vice President, Secretary/Treasurer

West Virginia Municipal League
Legislative Committee
Ins. Pooling Project Steering Comm.

Charleston Civic Center Board
Board Member

Charleston Sanitary Board
Financial Advisor

Regional Intergovernmental Council
Kanawha-Putnam Metropolitan Planning Organization/ WV Region 3
Mayoral Board Representative

Charleston City Council
Ward 5 Councilmember
Committee assignments:
Finance
Rules and Ordinance
Employee Relations (Vice Chair)
Parks & Recreation
Healthcare Task Force
Task Force on Charleston Housing
Watt Powell Park Blue Ribbon Com.

Highland Hospital Association, Inc.
Board Member

West Virginia Association of Rehabilitation Facilities
Board Member

Servant Leader Award
Charleston Area Alliance

Caperton Award of Excellence 2014
Awarded for Excellence in Workplace
Healthcare and Wellness Initiatives

Charleston Main Streets
Chairman's Brick Urbanite Award
2017

Office/Facility Administration and Risk Management

- Negotiated leases and managed office build-outs and set-ups; implemented remote work protocols.
 - Performed risk management assessments and activities including procurement and administrative oversight of appropriate policies of insurance.
 - Developed business continuity and continuation of operations plans.
 - Negotiated copier leases and oversaw procurement of library and office supplies.
-

City of Charleston, West Virginia **City Manager**

Charleston, WV
6/2003-1/2019

Chief Administrative Officer and business agent for the capital city and largest municipality in the State of West Virginia.

- Population: 51,400 (2010)
- Area: 32.64 square miles.
- General Fund: \$100M
- Budgeted Full-time Workforce: 800

Primary Duties and Responsibilities:

- Responsible for turning policy directives into organizational action through the supervision and control of the executive work of the city departments as directed by the mayor and the 27-member city council, and as provided by the city charter and city code.
- Represented the mayor, council, and the municipal government in the community and before other governments, agencies, boards, associations, the media and at public events.
- Negotiated and made contracts for labor, supplies, insurance, and professional services.
- Exercised hiring authority and setting wages and salaries of non-uniformed employees subject to annual budget appropriations and the Personnel Rules and Administrative Policies adopted by Council.
- Responsible for the maintenance and management of all real property owned by the city.
- Directed the development and presentation of annual budgets for all general governmental and proprietary funds of the city, including capital improvement planning and projects, and oversaw the efficient execution of adopted budget plans.
- Provided performance, financial, and legislative reporting and analysis to the mayor and council.

Representative examples of Performance:

Operational Leadership

- Provided executive direction and oversight to 30 city departments and sub-units; led department head meetings, cross-functional teams, and annual retreats which facilitated better communication and the breakdown of organizational silos.
- Consolidated department-wide procurement and grant administration functions to eliminate wasteful spending and conserve resources.
- Designed a parking efficiency study and implemented data-based initiatives to address high demand parking pressures, activate under-utilized capacity of on-street and garage spaces, and effect cost savings and efficiencies through technology and reprogramming of garage operations.

DAVID D. MOLGAARD

- Pursued and implemented Municipal Home Rule initiatives addressing procurement of design services, design-build project delivery, urban deer hunts, on-the-spot citations for building and zoning enforcement, liens on property for repairs to dilapidated structures or sidewalks, relief from certain DNR and DEP permitting requirements, and streamlining the disposition of City property, to name a few.
- Led a delegation to Banska Bystrica, Slovakia, to formalize our sister city relationship and develop regional contacts for economic, educational, and cultural exchanges.

Employee Relations and Staffing Initiatives

- Implemented strategic realignments of duties, responsibilities, and staffing levels based upon internal efficiency studies.
- Directed an overhaul of pay structures and redrafting of the Personnel Code based upon a commissioned compensation and classification study.
- Directed implementation of a performance management framework focused on core competencies and professional development.
- Created an in-house construction crew to timely address maintenance and workplace safety issues and to help raise employee morale and productivity by remodeling and revamping dismal and inefficient spaces and working conditions within City Hall and other city-owned facilities.

Innovative Financial Stewardship

- Directed the city to a self-insured healthcare program and proactively managed costs and services through a multifaceted approach which included: an in-house wellness center staffed by licensed clinicians; coordination of third-party medical claims and pharmaceutical benefits administrators; negotiated discounts with area hospitals; service relationship with the University of Charleston Pharmacy Program faculty for prescription drug maintenance counseling; and a Healthcare Reserve Fund with accumulated reserves from savings that reached in excess of \$9 Million (over one year of budgeted program funding) to meet future healthcare cost contingencies.
- Proposed a new pension contribution methodology which was adopted into state law to arrest and reverse growing trends in unfunded pension liabilities for municipal uniformed services.
- Proposed the city's first Stabilization Fund (i.e., Rainy Day Fund), funded through efficiency savings and budget surpluses, to cover unforeseen budget contingencies.
- Drafted and guided implementation of the city's first City Service Fee ("User Fee") providing funds for a robust paving and street maintenance program and to support police services.
- Directed the creation of a TIF (Tax Incremental Financing) District with the implementation of a new half-cent sales tax to secure funds for the Charleston Civic Center renovation and expansion project.

Project Management: Economic Development, Infrastructure, and Public Works Projects.

- Developed and managed the Charleston Coliseum and Convention Center Expansion and Renovation Project. \$109 Million Design-Build project funded through Property Tax TIF and Revenue Bonds supported by City-wide half cent sales tax. Substantial completion: Sept. 2018.
- Developed and managed the Charleston Ballpark Project. City owned Professional Minor League Baseball Stadium. \$23 Million. Completed April 2005. Construction Manager at Risk delivery method.

DAVID D. MOLGAARD

- Developed long-term multi-year plan and budget for rehabilitation and scheduled maintenance of bridges and city parking structures to avoid costly repairs necessitating borrowing.
- Other notable projects: Haddad Riverfront Park Renovation and Court Street Overlook; City Hall Renovations; City Service Center Build-out (to create one-stop shop of city departments responsible for business and development services); Fire Station Replacement Project; Spring Hill Cemetery Administration and Maintenance Facility (designed and built with in-house crews); Kanawha Trestle Pedestrian and Bikeway Project; Slack Plaza and Brawley Walkway Renovation Project; Cato Park Soccer Fields construction and rehabilitation.

OTHER PROFESSIONAL WORK EXPERIENCE

West Virginia University Institute of Technology Business Law Adjunct Instructor

Montgomery, WV
8/1997–12/2003

Taught business law survey courses to college students.

- Topics covered included the legal environment of domestic and international law; torts, crimes, and business ethics; contracts; intellectual property, internet law, and electronic commerce; agency law; employment and labor law; an introduction to the general principles of business law, with emphasis on the Uniform Commercial Code (UCC); sales transactions; commercial paper; secured transactions; business organizations, such as partnerships and corporations; property law, including landlord tenant, transfer and leases; bankruptcy.

Lawyer

5/1988 – 6/2003

Experienced litigator in private practice with concentration in employment law, administrative law, personal injury, business matters, and insurance matters.

David D. Molgaard, Attorney at Law

Principle of law practice concentrating in employment, administrative, business, and insurance law matters including insurance defense litigation and subrogation (1996–2003).

Heavens & Molgaard

Partner in litigation practice with a concentration in insurance and employment law (1995–1996).

McQueen & Brown, L.C.

Shareholder and Department Head over Personnel (1993–1995). Associate Attorney (1990–1993). Primary practice concentration in insurance defense and employment law litigation.

Bordas & Bordas

Associate trial lawyer. Primary practice concentration in plaintiff personal injury litigation (1988–1990).

Second Judicial Circuit of the State of West Virginia.

Law Clerk to the Hon. Richard A. Warmuth (1986). Primary duties: research and writing.

ADMISSIONS TO PRACTICE LAW

Supreme Court of Appeals of West
Virginia. 1988

U.S. District Court for the Southern District
of W.Va. 1988

U.S. District Court for the Northern District
of W.Va. 1988

U.S. Court of Appeals for the Fourth
Circuit. 1994

Candidate Introduction

DAVID MOLGAARD

EDUCATION

West Virginia University, Morgantown, WV:

Doctor of Jurisprudence (J.D.) (1988)

Masters of Science (M.S.) Industrial Labor Relations (1990)

Bachelor of Arts (B.A.) English (1985)

EXPERIENCE

Chief of Staff and Firm Administrator, Bailey & Glasser, LLP	2019 – 2023
City Manager, City of Charleston, West Virginia	2003 – 2019
Financial Advisor, Charleston Sanitary Board, WV	2004 – 2019
City Council Member, City of Charleston, WV	1999 – 2003
College Adjunct Instructor, Business Law, West Virginia University Institute of Technology, Montgomery, WV	1997 – 2003
Attorney in private practice	1988 – 2003

BACKGROUND

The City of Charleston is the state capital, county seat, and the largest municipality in the State of West Virginia. Sitting at the confluence of three interstate highways and two rivers, Charleston's vision is to be the Cultural, Recreational, and Business Capital of the Appalachian Mountains. The city has just under 50,000 full time residents, but it serves a much larger base as its population swells daily with state and service workers and the many visitors it attracts through tourism and to its governmental, commercial, meeting, and entertainment offerings. Nevertheless, it has managed to maintain its small-town charm through strategic planning initiatives, the hospitality of her people, and the service culture of the 800 full-time employees (18 who reported directly to me as the city manager) who are focused upon being the most efficient and effective municipal organization at balancing and meeting the reasonable needs and expectations of the city's core constituents.

When I left the position of City Manager in 2019, Charleston was operating with a General Fund budget of just over \$100 Million. This did not include the enterprise funds that support the parking system or the Coliseum and Convention Center operations, which were an additional \$5 Million. Nor did it include funding for major projects, such as the \$109 Million Coliseum and Convention Center Expansion and Renovation Project which we substantially completed under my guidance in September 2018 after three years of construction while the facility stayed open for business.

Through prudent management and resource allocations, we were able to put aside additional funds that could be drawn upon to meet unforeseen and/or planned contingencies: over \$6

DAVID MOLGAARD

Million in a Healthcare Reserve, \$4 Million in a Stabilization Fund, and over \$14 Million in a Pension Reserve Fund that continues to build.

The three most significant issues facing Charleston when I left were:

- Unfunded Uniform Pensions. Charleston's Police and Fire Pensions were poised to lead the city into bankruptcy with unfunded liabilities over \$280 Million until we implemented an innovative financial solution. In 2010 I devised a new contribution methodology which was adopted by our state legislature with minor modifications that, among other things, allowed the city to close and conserve the existing assets of the failing funds, start making benefit payments directly out of our general funds for certain beneficiaries, and begin to build up unrestricted reserves to meet future pension obligations. This program was working as expected when I left and should completely eradicate the city's unfunded pension liabilities over the next 30 years—if subsequent administrations stay the course and administer the program as devised.
- Aging and vacant structures. Although the Charleston Building Commission has taken down hundreds of deficient and uninhabitable houses over the last decade, many more need to come down. Many are owned by absentee landlords and have become havens for a transient population that perpetuate criminal and illegal drug activity.
- Downtown commercial redevelopment. In the 1980's, Charleston undertook a massive urban redevelopment program that included the construction of a downtown mall with four anchor tenants—all but one of which (JCPenney) have now closed. To top it off, the mall owners defaulted on a \$100 Million loan which put the mall into receivership. Although the property was subsequently sold at a substantial discount to new owners, they have continued to lose tenants and have done little to bring in new ones. Additionally, while several other large commercial office and retail buildings in the downtown have recently been renovated into downtown residential units, there are still numerous street level store fronts and vacant lots in the downtown area which have yet to attract viable projects.

After serving over 15 years as the chief administrative officer for the City of Charleston, I was heavily recruited to facilitate administrative and organizational change initiatives as the Chief of Staff and Firm Administrator for a multi-jurisdictional law firm founded and headquartered in the city. This opportunity to step back from public service for a period to hone my business, administrative, and integrative leadership skills in the private sector has given me an opening to take a fresh look at local government performance from an outside perspective and to gain new operational skills and organizational insights that I am eager to bring back to local government administration.

GENERAL, MANAGEMENT STYLE AND EXPERIENCE

As a practicing attorney (over 15 years), I regularly counseled my clients and helped lead them to successful outcomes. As a city council member, I had a seat at the table in formulating policy and a vision for our city while serving as a representative and an intermediary for my constituents. These experiences translated well to my role as city manager where I was able to use my considerable training, analytical skills, and listening abilities to formulate innovative solutions and recommend sound courses of action to the mayor, council, and organization at large.

I am drawn to this position with the City of Fernandina Beach at this point in my career arc because Fernandina Beach appears to be the type of community that would value and benefit from a collaborative, innovative approach to local government administration that revolves around a culture of teamwork, open communication, empowerment, and continuous improvement.

While from a local government perspective I am coming from a much larger organization on paper, I entered that arena from much smaller professional work environments—a contrast that has served me well. I welcome the challenge of directing a smaller, more nimble organization while bringing experience from a larger perspective to dealings and collaborations with adjacent and/or controlling jurisdictions.

I value planning and taking the time, when possible, to define problems and work out optimal solutions so that implementation can be executed with confidence and does not become a series of costly do-overs. Moreover, experience tells me that it is important to understand the roles of structure, in-puts, and processes in the realization of successful strategic outcomes. To that end, as a manager and organizational leader I look to develop and improve core competencies within the organization; deploy and leverage appropriate technologies; strategically align duties and responsibilities; identify, develop, and retain leaders; reform work environments and incentives to facilitate mission; and collaborate with others, both inside and outside of the organization. I believe all the people who have worked under my direction could give multiple examples of how I have advanced these objectives and have made their performance and that of the organization more effective.

Over time it is easy for organizations to drift towards rigidity and bureaucracy through routine and customary thinking. I have found that when transforming policy into effective organizational action, it is often profitable to question conventional approaches and to adopt a synergistic entrepreneurial mindset that looks beyond habitual responses or the narrow issue at hand.

For instance, when faced with the need to secure federal assistance through Section 14 of the Flood Control Act of 1947 to address flood flow erosion and dredged fill and soil recession along a historic riverbank intersecting our city, we adopted a broader perspective. By demonstrating how this project with the U.S. Army Corps of Engineers would benefit the boulevard running

alongside the waterway and prevent costly future road repairs due to bank erosion, we were able to justify the use of funds otherwise restricted by ordinance to street maintenance and repair for this vital work. This approach allowed us to not only support the initial project, for which we would not otherwise have had the funding to move forward, but also to invest in two additional projects along different stretches of the river and boulevard in the same fashion.

Similarly, by thinking outside the traditional delivery methods for capital improvement projects, we were able to turn what might have been a limited renovation and modest expansion to our civic center into a \$109 million LEED Silver Certified Coliseum and Convention Center. We did that by eschewing conventional design-bid-build methodologies in favor of a design-build contest that assured the best bang for our buck, by shaping the scope of our project in terms of project phases that were complete in themselves, and by defining our budget in terms of the revenue sources dedicated to the project as opposed to an architect's estimate of what it should cost before developing bid packages. Consequently, we were able to turn an aged and unappealing facility into an attractive economic driver capable of supporting and competing for Tier 2 convention business.

By conducting internal efficiency studies and reorganizing various departments, including positions within those departments (often through attrition), we were able to generate additional capacity without additional cost. One notable example of our achievements was establishing an in-house project construction crew without adding to aggregated headcount or personnel overhead. This resource allowed us to address deferred maintenance on our aging facilities, remodel city hall in a manner consistent with its historical context, and build out new public safety, administrative, and maintenance facilities. Moreover, we accomplished all these projects on a pay-as-you-go basis without having to borrow funds or make more costly procurements.

Over the course of my career, I have taken almost every personnel action possible except for mass lay-offs or reductions in force due to budgetary constraints. To me, it is not only important to get the right people on the bus, but to also get them in the right seats on the bus. Consequently, I will try where possible to develop or move people within the organization before giving up on an individual with potential. Unfortunately, there have been times where I have had to separate persons from employment—but these have been where performance or effort has been clearly lacking after progressive discipline or performance counseling, or the employee's actions or performance have been such as to warrant immediate termination.

The elected officials I have served would likely say that I am competent, responsive, and resourceful in running the organization and in effectively advancing their vision and policy initiatives. In fact, they (26 members + a voting mayor) unanimously passed a resolution to recognize my outstanding performance and efforts to that effect upon my exit.

I credit my prior experience as an elected official for providing insights into the pressures and critical role elected policymakers play in addressing various, often conflicting, interests. As a chief administrator I have consistently aimed to anticipate concerns and to develop the level of

DAVID MOLGAARD

analysis that I would expect and need as a policymaker to make informed decisions and to communicate relevant information and findings in advance so that the governing body is well-prepared to engage in informed debate and make thoughtful decisions. Once a decision is made, I recognize that it is my role to execute and direct implementation of the commission's policy directives, and I do so with equal dedication and diligence.

I believe one of my greatest strengths is my understanding of place and place making—both in terms of people and the built environment. While organizationally I place a strong emphasis on structure, process, and inputs, most people outside of the organization would probably commend my talent and ability to plan, develop, and construct successful public work projects and events that have significantly impacted the quality of life in our community. They might, for instance, point to our \$23 Million minor league ballpark project, which kept professional baseball in Charleston. Through my direction and project administration we saved an existing warehouse which provided additional and unrelated commercial program space and enhanced the economic development dynamics of the project while preserving a historic structure and the character of the neighborhood.

Or they may point to the innovative Haddad Riverfront Park improvements which included the construction of a retractable canopy over an existing seating bowl, a new stage reminiscent of the sternwheelers that plied our working river, and a floating boat dock with shore power. And they might also note my involvement in developing our 15-week long free concert series (Live on the Levee) that takes place at that park and caters to residents, boaters, and visitors while enhancing our downtown business climate on weekends. . . to name just a few.

When I first stepped into the role of city manager in Charleston, I found an organization that was very siloed, with strong lines of delineation that were inefficient and that worked against inter-departmental collaboration. I am happy to say that we drastically changed that culture. We started at the department head level, and we were making great strides in cascading strategy and managerial efficiency measures down to the middle managers and frontline supervisors throughout the organization when there was a change in administration. My biggest regret is not being able to complete the transformation of structural changes in performance management, measures, and reporting that we started—and for which we were making great progress—before I left the position.

In terms of weaknesses, I realize I am not always diligent in purging or cleaning up old files and accumulated artifacts of projects that have been completed or were investigated but were not pursued. In the past this has made my office look a little more disorganized than it really was, but I have made great progress, particularly since the start of the pandemic, in going paperless and keeping more of my work products in electronic formats.

DAVID MOLGAARD

During the first six months my efforts will involve, but not be limited to:

- Becoming more familiar with the community and its challenges. I will spend considerable time meeting with elected officials, business leaders, and community groups. I will also introduce myself to the officials of adjacent communities, the county, and state and federal representatives.
- Meeting with staff and understanding structure and the current state of the organization. I look to build upon the successes of the organization and not to make radical changes without a clear purpose.
- I will get into the weeds with respect to the city's current financial position and budget performance and will get up to speed on current projects so that no balls are dropped.
- At the conclusion of my investigations and at regular intervals thereafter, I will make reports to the commission of my findings and explore any other avenues that the commission may suggest or desire.

I have always had a good rapport with the media. Charleston is served by three local television news organizations, several radio stations, and during most of my tenure two newspapers which, as I was leaving merged into one but with two editorial staffs. I worked well and extensively with the media (most had my cell phone number and used it). While I generally deferred to the mayor and his staff to issue press releases and conduct news conferences regarding policy matters, I was frequently called upon to provide the specifics of administration and council action, and I was no stranger to providing everything from succinct and relevant background information to in-depth media analysis regarding projects or municipal actions or events.

In my spare time, I enjoy reading: mostly literary classics, philosophy, and job relevant non-fiction works. I also like to spend time with my wife and participate in outdoor activities. We look forward to being closer to our only child and his new wife who live and work in Orlando.

SIX ADJECTIVES OR PHRASES I WOULD USE TO DESCRIBE MYSELF

- Competent
- Proactively Engaged
- Innovative Out-of-the-box Thinker
- Responsive
- Trustworthy
- Highly Ethical Leader and Mentor

DAVID MOLGAARD

REASON FOR DEPARTING CURRENT POSITION

I retired from the City of Charleston with the out-going administration after serving the city for 19+ years (15 years and 8 months as city manager and 4 years as a councilman) upon learning that the newly elected Mayor desired to bring in her own leadership team and would be presenting another's name for confirmation to the role by the newly elected council.

My position as chief of staff and firm administrator for a multi-state law firm ended as a result of expansion and changes in the business environment and reorientation of roles and responsibilities within operations.

MOST RECENT RELEVANT SALARY

My most recent base salary for a chief administrative role was \$231,750, not including bonuses, and cell phone reimbursements. My final compensation as the city manager for the City of Charleston was \$168,504 plus an additional annual stipend of \$5,000 paid by the Charleston Sanitary Board, the city's waste-water utility, for serving as its financial advisor.

CB&A Background Checks

**Background Check Summary for
DAVID "DAVE" DUANE MOLGAARD**

Criminal Records Checks:

Nationwide Criminal Records Search	No Records Found
County	
Kanawha County, WV	No Records Found
State	
West Virginia	<i>Records Maintained by County. See Above.</i>

Civil Records Checks:

County	
Kanawha County, WV	No Records Found
Federal	
West Virginia	No Records Found

Motor Vehicle

West Virginia	No Records Found
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Credit	Excellent
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Personal Bankruptcy	No Records Found
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Sex Offender Registry	Not Listed
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Education	Confirmed
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Employment	Confirmed
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Social Media	Nothing of Concern Found
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**Background Check Summary for
DAVID “DAVE” DUANE MOLGAARD**

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

**Background Check Summary for
DAVID "DAVE" DUANE MOLGAARD
Personal Disclosure**

Personal Disclosure Questionnaire

Name of Applicant: David D. Molgaard

The following questions are designed so that we will be able to make full disclosure to our client concerning your background. Please answer them honestly. Cutting corners or misrepresenting your past will result in you being eliminated from all further searches conducted by this firm. We understand that frivolous charges are sometimes made and that charges do not mean you were guilty. We also understand that you may have been wronged and needed to seek compensation. The bottom line is that we want to be certain that our client is fully informed. If you have any questions, please contact us for clarification.

Please explain any yes answers on a separate sheet of paper.

1. Have you ever been charged or convicted of a felony?
Yes ☐ No ☒
2. Have you ever been accused of or have been involved in a domestic violence or abuse incident?
Yes ☐ No ☒
3. Have you ever declared bankruptcy or been an owner in a business that did so?
Yes ☐ No ☒
4. Have you ever been the subject of a civil rights violation complaint that was investigated or resulted in a lawsuit?
Yes ☐ No ☒
5. Have you ever been the subject of a sexual harassment complaint that was investigated or resulted in a lawsuit?
Yes ☐ No ☒
6. Have you ever been charged with driving while intoxicated?
Yes ☒ No ☐
7. Have you ever sued a current or former employer?
Yes ☐ No ☒
8. Please list links to all your social media accounts (Facebook / Instagram / LinkedIn / Twitter, etc.) and your personal web page if you have one.
See Attached.
9. Is there anything else in your background that, if made public, would cause you, our client or our firm embarrassment if it came to light through the press or any other mechanism?
Yes ☐ No ☒
10. Please provide a list of any lawsuits in which you are or have been a party either as plaintiff or defendant.



Attested to: _____
Signature of Applicant

**Background Check Summary for
DAVID “DAVE” DUANE MOLGAARD
Personal Disclosure Explanation**

Personal Disclosure Questionnaire

Name of Applicant: David D. Molgaard

The following questions are designed so that we will be able to make full disclosure to our client concerning your background. Please answer them honestly. Cutting corners or misrepresenting your past will result in you being eliminated from all further searches conducted by this firm. We understand that frivolous charges are sometimes made and that charges do not mean you were guilty. We also understand that you may have been wronged and needed to seek compensation. The bottom line is that we want to be certain that our client is fully informed. If you have any questions, please contact us for clarification.

Please explain any yes answers on a separate sheet of paper.

Have you ever been charged with driving while intoxicated?

I was charged with DUI sometime in or about April 1984 while I was a college student. My driver's license was revoked for a period and then reinstated. I have not had any issues since.

Please list links to all your social media accounts (Facebook / Instagram / LinkedIn / Twitter, etc.) and your personal web page if you have one.

<https://www.linkedin.com/in/david-molgaard/>

<https://www.facebook.com/david.molgaard>

<https://twitter.com/DMolg>

<https://www.instagram.com/dvdmlgrd/>

CB&A Reference Notes

Reference Notes David Molgaard

Jack Harrison – Former Council Member, Charleston, WV 304-545-1530

Mr. Harrison first met Mr. Molgaard in 2003 when the latter became the City Manager. They worked together until January 2019 when they both left the organization.

Mr. Molgaard was a fantastic City Manager who allowed the mayor to do his job and not be shackled with the daily operations of the city. One of his biggest strengths was overseeing projects and seeing them through to fruition. For example, their \$23 million minor league ballpark would not have gotten done without his project management skills. Additionally, they just completed a \$100 million upgrade to the civic center that was completely funded with city dollars and no outside sourcing.

When it comes to dealing with personnel, Mr. Molgaard did very well. He understands how things work with his staff at all levels of the organization from the department directors to the police officers. He knows how to get things done by keeping his people focused and looking towards the prize.

In terms of finance Mr. Molgaard is very astute at projecting and managing pension debts and he provided guidance to the Council on managing those unfunded liabilities. He is very knowledgeable with a law background and understands contracts and municipal finance very well. That is not to say that he made all those types of decisions in a vacuum. He was interested in learning about, talking, and discussing issues, and embraced the ideas of others.

By nature of being the City Manager, Mr. Molgaard was required to interact on a regular basis with the public at large. He wore countless hats and was involved in various groups within the community getting their buy in for projects and new processes.

Communicating with the Council was key for Mr. Molgaard. He knew that in order for him to accomplish anything at the city he would need the Council's approval. He ensured they had a constant flow of information back and forth. He communicated everything with them whether it was negative or positive, ensuring that they would be prepared on every subject matter.

Mr. Harrison does not know of any controversial issues caused by or involving Mr. Molgaard. He has no knowledge of anything from Mr. Molgaard's background that would be construed as embarrassing to any future employer. Any organization would be fortunate to have Mr. Molgaard on their team. He is a class act and Mr. Harrison highly respects his intellect and good judgement.

Words or phrases used to describe David Molgaard:

- Smart,
- Energetic,
- Easy to get along with, and
- Willing to listen.

Reference Notes David Molgaard

Strengths: An exceptional manager who accomplished a great deal while in their city.

Weaknesses: None identified.

Tom Lane – Former Council President, Charleston, WV 304-347-1111

Mr. Lane has known Mr. Molgaard since 1999 when he was serving on Council. They continued to work together when he became the City Manager in 2003 until he left that position in 2019.

From the time that Mr. Lane met Mr. Molgaard as a fellow Council Member he recognized how diligent he was at reading contracts and how his background as an attorney helped them tremendously in that respect. He was well versed in contracts and always had a constructive comment and a critical view of them to ensure that the best interests of the city were being considered. Few people put as much time as he did into looking at all the issues when he was serving on Council.

Mr. Molgaard's law degree gave him a unique benefit and he was much better at understanding the workings of the city than others. His education gave him a strong base from which to work. He also had a tremendous ability to communicate and articulate complicated issues in a very clear manner so that others could understand them. He always offered explanations to the Council, ensuring that everyone understood what they were doing.

In terms of decisions, Mr. Molgaard had excellent judgement. As a Council Member he was called upon to make judgements as a city official and as a City Manager he was the decision maker on numerous issues. He and the Mayor made a fine team as the mayor was more of a big picture person and Mr. Molgaard took care of the daily operations decisions unless it involved a policy change.

Mr. Lane would characterize Mr. Molgaard as innovative, especially at putting things into place that were new and creative which provided great benefit to the community. He was always one who was constantly thinking outside the box. Early on when he became the City Manager, he and the Council had a planning meeting where he fully embraced the goals set forth by the Mayor and Council. He then drilled those goals down through the ranks of the organization ensuring that everyone caught the vision.

One goal that Mr. Molgaard accomplished was to make the city run more efficiently and be more user friendly to the residents. He came up with the idea of a one-stop shop making all the city's services available in one location for the convenience of the users.

Another issue that Mr. Molgaard tackled was that of the ever-increasing costs of healthcare for the city's staff. This issue predated his tenure and no matter what they did they continued to struggle with how to maintain and control those costs. When they were in the process of building the new ballpark, they had an excess space where they decided to use it as a health clinic for city

Reference Notes David Molgaard

staff. Everyone on the city's health plan now receives a basic yearly health test as well as primary care through the clinic. When that was put into place the cost of healthcare decreased. They were able to save money as well as document some individuals who had some serious health issues that needed attention. It not only helped the budget, but it also helped to save people's health. They now always come under budget in that regard and have \$5 million in reserve for medical care expenses.

Mr. Molgaard is a people person. He does well in both one-on-one settings as well as in large groups. He is quick on his feet and speaks well in front of an audience. When stressful situations arose, he remained objective and was calm, cool, and always responded in a measured manner.

Mr. Lane does not know of any controversies involving Mr. Molgaard. He knows of nothing remotely embarrassing in Mr. Molgaard's background that would be uncovered if the press were to go digging. He is quite familiar with Mr. Molgaard both professionally and personally, and if something were there, he would have found out years ago.

Words or phrases used to describe David Molgaard:

- Disciplined,
- Analytical,
- Thoughtful,
- Creative,
- Diplomatic, and
- Rock solid under pressure.

Strengths: A tremendously dedicated and intelligent individual who works and communicates well with others.

Weaknesses: None identified.

Mary Jean Davis – Planning Committee Chair, Charleston, WV 304-546-5902

Ms. Davis met and started working with Mr. Molgaard in 1998. They first worked together when he was serving on the Council and then when he became the City Manager. She has a great deal of respect and trust for him.

Ms. Davis has never seen such a talent as Mr. Molgaard. Before he came on the Council, he was a good attorney and since that time he has become a master of all trades. His work ethic is unbelievable and one she has never seen the like of in anyone else. He ensures that the ball does not get dropped on any project. He is constantly monitoring the status of things but does not get in the way of the work being performed.

Reference Notes David Molgaard

When it comes to decisions, Ms. Davis has never known Mr. Molgaard to make a bad one. When he speaks people know it is from a place that has been studied and examined thoroughly. From pension plans to project management he knows what he is doing and has incredible judgement. It was his talent for budget control, design, and knowledge that made their new ballpark possible.

Ms. Davis would characterize Mr. Molgaard as someone who is innovative, a change agent, and someone who maintains the organization at a high-performance level. He is an attorney by profession and all three of those attributes fit him. He is extremely thorough when he is working on a project, and he does his research. When he is given a job to do, no matter what it is, he will get it done and get it done right.

Dealing with the public is another area where Mr. Molgaard shines. He has extensive experience with the community and works with them extremely well. He is also just as attentive to the elected officials and keeps them well informed about what is happening in the city. If something is not working, he will inform those involved. Additionally, he deals very well with stress, especially when he is in the public eye. Their former mayor had a difficult personality and sometimes it was stressful dealing with him, however, Mr. Molgaard did a fine job of working with him without becoming stressed out.

Ms. Davis is not aware of anything controversial or embarrassing involving Mr. Molgaard that would come to light if the press were to investigate his history. He has a plethora of fine attributes and anywhere he lands the people in the organization will be pleased with him.

Words or phrases used to describe David Molgaard:

- Educated,
- Friendly,
- Compassionate,
- Trustworthy,
- Loyal, and
- Admired.

Strengths: An extremely hardworking individual who is highly intelligent and thorough.

Weaknesses: Can be hard for him to delegate.

Andy Richardson – Former Council Member, Charleston, WV 304-549-5597

Mr. Richardson worked with Mr. Molgaard between 2011 and 2019 when the latter was City Manager. During that time, they worked on several important projects together. Mr. Molgaard was an excellent Manager. He was very thorough and able to manage multiple projects simultaneously. He had a way of knowing when to bring others into a decision and when to

Reference Notes

David Molgaard

move forward and make the decision on his own. He is both an effective leader and an effective manager.

Mr. Molgaard directed a huge project to redo the Colosseum and convention center. Mr. Richardson served on the board and worked closely with Mr. Molgaard in that capacity. Mr. Molgaard acted as the city government liaison on the project and oversaw the renovations with impressive acumen. He also oversaw the construction of a new baseball stadium with a similar approach and results.

Mr. Molgaard was instrumental in the development of two items which were game changers in the downtown area. The first was developing a program to encourage local restaurants to embrace sidewalk dining, and the second program was to modernize the parking meters so patrons could use either coins, mobile apps, or a card to pay. These two initiatives were wildly successful and helped bring more life to the downtown area.

Mr. Molgaard is innovative. He is a problem solver and solution oriented. He possesses a good amount of vision associated with his work. He is active in the community and available for comments from the public. He prefers operating on a schedule and does not waste time, either his own or others. At the same time, he is cognizant of taking care of himself and taking time to recharge away from the bustle of his city duties. He takes time to go to his cabin out of town to create a functional work/life balance. Because he takes the time to care for himself, when he is present in his position, he is fully active and engaged and ready to go to work and be productive.

Mr. Molgaard was an excellent City Manager for Charleston and will continue to excel wherever he chooses to go. Mr. Richardson highly recommends him for a managerial position.

Words or phrases used to describe David Molgaard:

- Conscientious,
- Man of great integrity,
- Intellectual,
- Savvy judgment,
- Enthusiastic, and
- Innovative

Strengths: Thoroughness and driven.

Weaknesses: He is better at managing projects than managing people. He was effective at both, but he preferred dealing with the complexities that come with projects rather than dealing with the individual personnel issues that come up in being a manager.

Reference Notes

David Molgaard

Greg Stone – Reporter, Charleston Gazette-Mail, WV 304-348-5124

Mr. Stone considers Mr. Molgaard a friend. They have known each other since the late 1990s. They attended the same church together, and Mr. Molgaard even represented Mr. Stone free of charge during his divorce. It was an unfortunate situation, but under the circumstances, it was a huge help. It was very charitable and generous of Mr. Molgaard to offer his services in this manner.

Mr. Molgaard is honest in his dealings with Mr. Stone and everyone else with whom he associates. He was a long-time City Manager for Charleston and was very respected in that position by the city council members and citizens at large. Mr. Stone covered City Council meetings occasionally and was impressed by the sincerity and professionalism Mr. Molgaard showed.

Being a lawyer, Mr. Molgaard was on top of the legal aspects of various projects in the city. He was industrious and saw all the projects through to the end. He was especially instrumental in completing a bike trail project on the West side of the town. It turned out to be such a successful project that the administration is currently looking at options to extend and increase the trails.

Mr. Molgaard was involved in everything. While the Mayor was a popular and entertaining individual, it seemed to Mr. Stone that Mr. Molgaard did most of the heavy lifting behind the scenes. He made sure all day-to-day items were taken care of so the mayor could focus on other items more suited to his position.

Mr. Molgaard knew how to stretch a dollar in productive and appropriate ways. He was savvy about where to allocate certain funds and had a good idea of how long money would last. He knew how to apply for grants and made the budget last. He has not been involved in anything controversial or potentially embarrassing to a future employer. He will be an excellent manager wherever he goes.

Words or phrases used to describe David Molgaard:

- Alert,
- Energetic,
- Fluent in his speech,
- Sharp,
- Focused,
- Friendly, and
- Helpful.

Reference Notes David Molgaard

Strengths: Highly competent, familiar with every part of his job description, always on top of things, actively engaged and takes pride in doing a job well done.

Weaknesses: Could be a bit bolder at times, although in his position as a city manager, instead of a mayor, perhaps boldness is not the quality one looks for in that position.

Miranda Rutledge – Former Assistant Manager, Charleston, WV 304-539-1011

Ms. Rutledge worked with Mr. Molgaard as Assistant Manager and Assistant Director of Human Resources between 2008 and 2019. He was her direct supervisor during that time. She is currently the HR Specialist with the Kanawha County Schools.

Mr. Molgaard was one of the best people for whom Ms. Rutledge has ever worked. He was very good at giving constructive criticism and helping others grow in their careers. She feels very fortunate to have worked for him for so many years.

Mr. Molgaard is a strong leader. He expects excellence from his employees, and they rise to the occasion. He makes quality decisions and has a good decision-making process. If there is a problem, he listens to everyone, gathers input, and then ultimately makes the final decision on what is best for the organization. He has a direct communication style. He did not let stressful situations get the better of him. He compartmentalizes the tasks and accomplishes what needs to be done.

Mr. Molgaard is innovative. He was often out in the community so he could understand where the real issues were and what needed to be addressed. There is nothing embarrassing or controversial in his background. Ms. Rutledge would hire him if she had the option and would work for him again if the opportunity arose. He will be a great manager anywhere he goes. He has much experience and growth in that arena and should be strongly considered for the position.

Words or phrases used to describe David Molgaard:

- Creative,
- Caring,
- Strong,
- Good leader,
- Customer service oriented,
- Experienced, and
- Listener.

Reference Notes David Molgaard

Strengths: Leadership and ability to get the right people into the right positions. He is in tune with finding people's strengths.

Weaknesses: Can be a little intimidating at first, but only because he is a confident and highly productive individual.

Charlie Loeb – Former Council Member, Charleston, WV 304-340-1298

Mr. Loeb has known Mr. Molgaard since 1998. They worked together as fellow Council Members until Mr. Molgaard became the City Manager in 2003. Mr. Loeb continued to work with him as a Council Member until the former retired in 2007. The two gentlemen continued to work together extensively with Mr. Loeb representing his clients on behalf of some real estate developments in the city until Mr. Molgaard left his position in 2019.

Mr. Loeb has nothing but the greatest praise for Mr. Molgaard's abilities intellectually, but also because he gets things accomplished. He rates an A+ for everything that he does. Even when he takes a strong position on issues he listens and knows how to resolve issues without letting his ego get in the way.

Mr. Molgaard makes good decisions, and he is well suited in demeanor and intellect to be a fantastic City Manager. In addition, he is innovative in terms of financing projects, and he has certainly maintained a high level of performance at the city. He has not been in a position to exercise any actions where Mr. Loeb would determine him as a change agent, but that does not mean he could not be one.

Charleston has a fairly large council with 27 members where Mr. Molgaard had to relate to each one on a regular basis both privately and publicly. He always dealt with everyone professionally and in a matter-of-fact manner. He does not beat around the bush in his communication but is extremely direct.

Mr. Molgaard has not been involved in anything controversial. He left the city because a new mayor came on board after several decades of the same mayor and she wanted her own people brought in. It is a great loss to the city and Mr. Loeb hoped he would land someplace close. He has a passion for urban planning and how successful cities have evolved over the years. Whoever hires him will be bringing a wonderful person on to their team.

Words or phrases used to describe David Molgaard:

- Effective,
- Straight forward,
- Intelligent, and
- Insightful.

Reference Notes David Molgaard

Strengths: An intelligent professional who listens to others and gets things accomplished.

Weaknesses: Some people would say that he took on or controlled too much as the City Manager, however, Mr. Loeb would respond that their city is thinly staffed so he had numerous responsibilities pushed onto him.

Cari Morris – Former Assistant to the City Manager, Charleston, WV 304-687-6551

Ms. Morris first met and began working with Mr. Molgaard in 2003. She began working directly for him as his assistant in 2016 until he left the city in January 2019.

Mr. Molgaard was a phenomenal manager and boss who Ms. Morris hated to see leave. He is the absolute best person she has worked with. He is charismatic and the kind of leader who inspires others. He inspired her to go back to school and pursue higher education. He is also quite personable and always knows everyone's name. He went the extra mile and was dedicated to his job.

One of Mr. Molgaard's strong points is decision making. Everyone in the city always came to him for advice on issues whether large or small. He also did well when it came to hiring personnel. He worked in conjunction with the department heads and the Human Resources Director to make the best hires possible.

Mr. Molgaard is very experienced in terms of interacting with the public. He is the type of person who when he walked around in the community, everyone knew him and who he was. He was always interested in people and kept mental notes about the people in his community.

Mr. Molgaard was innovative. Whatever problem was presented to him, he mulled it over and came up with an out of the box solution that no one else had thought about. Once the solution was settled, he communicated it to his staff and then brought it to fruition.

In terms of finances, Mr. Molgaard is extremely well versed. He worked closely with the Finance Director dealing heavily with the budget and ensured that it was always balanced. He was successful in reducing the cost of healthcare for the employees and was conscientious about getting them the best coverage for their money.

In stressful situations no one even knew if Mr. Molgaard was being affected. His personality is even keeled and professional. Ms. Morris never heard him raise his voice at an employee or anyone for that matter.

Ms. Morris is not aware of Mr. Molgaard having any embarrassing items in his background that would come to light if the press were to investigate him. He has not been involved in any controversies to her knowledge. When the new mayor and her team came on board, he was very

Reference Notes David Molgaard

compliant and helpful throughout the entire transition. If Ms. Morris had the chance to hire him, she definitely would.

Words or phrases used to describe David Molgaard:

- Smart,
- Innovative,
- Charismatic,
- Caring,
- Self-starter, and
- Responsible.

Strengths: An inspiring leader who is personable, charismatic, and dedicated to doing the best job he can.

Weaknesses: Sometimes loses track of time and spends too much time on projects and has to readjust his timeframe. It is not to the extent that he ever misses deadlines, but it is something that he and Ms. Morris continually worked on together.

Bobby Reishman – Former Finance Committee Chair, Charleston, WV 304-546-8632

Mr. Reishman first met Mr. Molgaard prior to him becoming the City Manager in approximately 1998. Mr. Reishman has worked as a Council Member since 2003.

Mr. Molgaard is talented, organized, and tremendously hardworking. Mr. Reishman was amazed at how quickly he picked up new things and ran with them. Charleston was successful because of Mr. Molgaard.

Mr. Molgaard makes good decisions, is innovative, and maintains the organization at a high-performance level. He was always involved in all the city's issues as well as the social aspects of the community. He was successful dealing with the public in general and was always communicative with them as well as the elected officials.

Mr. Molgaard was a leader in the sense that he took the organization's vision and rallied the employees around it. He worked well with the employees and involved the department heads more than they ever were before he was the manager.

Mr. Reishman is not aware of any controversies involving Mr. Molgaard. He would be shocked if the press found anything in Mr. Molgaard's background that proved to be embarrassing.

Reference Notes David Molgaard

Words or phrases used to describe David Molgaard:

- Dedicated,
- Hardworking, and
- Competent.

Strengths: A talented and hardworking professional who worked well with the employees, the elected officials, and the general public.

Weaknesses: None identified.

Mark Baldwin – City Manager, Martinsburg, WV 304-264-2131 Ext. 277

Mr. Baldwin met Mr. Molgaard through the various professional City Manager associations at conferences and meetings in 2003.

Mr. Baldwin always finds Mr. Molgaard to be engaging and knowledgeable in many aspects of city management. He is in tune with what is going on and is always accommodating to Mr. Baldwin and his questions.

Even though the two gentlemen have only met and talked a handful of times per year, because Mr. Baldwin keeps up with the surrounding municipalities in his area, he keeps up with what has happened with Mr. Molgaard. He knows that he has done a fine job managing Charleston and that he makes good decisions when it comes to his community.

Mr. Baldwin would characterize Mr. Molgaard as someone who is innovative and someone who maintains the organization at a high-performance level. If the organization is working well, he will not rock the boat, however, he has been innovative with restructuring to make it more efficient. He is good at keeping up with the times and moving the city forward. Lasting as long as he did with the previous Mayor shows that he did something right.

Mr. Baldwin is not aware of anything controversial involving Mr. Molgaard. He has no knowledge of any embarrassing information that would come to light if the press were to investigate Mr. Molgaard's history. He would hire Mr. Molgaard if he had the opportunity.

Words or phrases used to describe David Molgaard:

- Knowledgeable,
- Engaged,
- Proactive,
- Innovative, and
- Creative.

Reference Notes David Molgaard

Strengths: An experienced and knowledgeable administrator who moves his community forward.

Weaknesses: None identified.

Joe Estep – Former Finance Director, Charleston, WV 304-549-5425

Mr. Estep first met Mr. Molgaard in 1999. They knew each other and worked together on the Finance Committee when Mr. Molgaard was an elected official. Mr. Estep came on board with the city as the Finance Director in 2004 and reported to him until Mr. Molgaard left his position in 2019.

Mr. Molgaard did a fantastic job for Charleston. He had such vision, but also the wherewithal to bring ideas to fruition by using his team in the right manner. He has done some tremendous things for the city.

Mr. Molgaard pays particular attention to details and uses his people in a smart manner. He expects them to generate results, but he also keeps on track with what is happening in the organization. He held weekly meetings to effectively communicate with the staff the happenings of the organization and the city. He has excellent written skills particularly with contracts and policies.

In a professional manner Mr. Molgaard was the type of manager who was out and about in the community. He was a member of the Board of Directors for the civic center and was a vocal person in the media representing the activities going on in Charleston. He was an excellent communicator which stemmed from his 20-plus years as an elected official and City Manager.

When Mr. Estep brought a situation to Mr. Molgaard the first thing he did was listen and filter through what he was hearing. He then took the time to evaluate the situation before going forward with a solution. He was not a reactionary problem solver, but a thoughtful and deliberate one.

Mr. Estep is not aware of anything in Mr. Molgaard's background that would be thought of as unflattering or embarrassing. He left because the new Mayor wanted her own staff. If Mr. Estep were an elected official, he would absolutely hire Mr. Molgaard to manage his community.

Words or phrases used to describe David Molgaard:

- Visionary,
- Intelligent,
- Good communication skills both internally and externally,
- Excellent written skills, and
- Absorbs and retains information very well.

**Reference Notes
David Molgaard**

Strengths: A tremendously talented and hardworking individual who has an incredible memory and vision for his organization.

Weaknesses: None identified.

**Paul Sheridan – Community Member & Attorney, Legal Aid of West Virginia, Charleston,
WV 304-543-6557**

Mr. Sheridan's primary involvement with Mr. Molgaard has been with their work with their sister city in Slovakia. He has known him for many years starting in approximately 2009.

Mr. Molgaard was the representative for the City of Charleston with their sister city in Slovakia and established a very important relationship in that regard. His interactions in that regard have been exceptional and he interacts with the people of that city extremely well.

In terms of doing his job as the City Manager, Mr. Molgaard seemed to do a fine job. He appears to be well organized and focused. He strikes Mr. Sheridan as someone who deals with important items keeping meetings and endeavored to keep the city focused and on track. He did a good job of walking the line between city and non-city functions.

Mr. Molgaard has a stellar reputation in the area and as a City Manager he was well respected by his peers as well as the residents. He was the central person in the development of the beautiful civic center that was completed. He knows what he is doing at his job, and he does it well.

Mr. Sheridan is not aware of anything controversial or that would be detrimental to Mr. Molgaard's character. If Mr. Sheridan were in a position to hire Mr. Molgaard, he certainly would consider Mr. Molgaard very seriously. If an organization was looking for someone to run the show, he is a strong candidate.

Words or phrases used to describe David Molgaard:

- Focused,
- Organized, and
- Personable.

Strengths: Well organized and focused.

Weaknesses: None identified.

**Reference Notes
David Molgaard**

**Matt Ballard – Former President & CEO, Charleston Area Alliance, Charleston, WV
304-356-3165**

Mr. Ballard first met Mr. Molgaard in 2005 when he came into his role at the Alliance. The two gentlemen worked on matters pertaining to Economic and Community Development for the city until Mr. Molgaard left his position in 2019.

Mr. Molgaard did an amazing job for Charleston. He is professional, serious minded, and a hard worker. He is always courteous and responsive to Mr. Ballard, the latter has enjoyed working with him, and has had nothing but a positive experience working with him.

Mr. Molgaard is a sound decision maker. He is logical and does not let emotion play into his decision-making process. He bases decisions on facts, research, and data. He led the entire process of the \$90 to \$100 million civic center renovation. Additionally, the three or four projects he has led in his thirteen years as City Manager will leave a positive mark on the area.

In his role in the city, Mr. Molgaard cannot avoid working and dealing with the public. He has fantastic customer service skills and works well with people in the community. At times the manager had to say no to residents, but they always left his office satisfied even if they did not get the answer for which they had originally hoped.

Mr. Ballard does not know of any controversial situations involving Mr. Molgaard. He knows of nothing negative from his past that would be uncovered if he were to be scrutinized by the press. He would definitely hire Mr. Molgaard if he had a role that fit his skill set. He was a good City Manager for them, and he will do well serving another municipality.

Words or phrases used to describe David Molgaard:

- Hardworking,
- Professional,
- Fair, and
- If presented with a vision, he will make it happen.

Strengths: An excellent manager who is professional and accomplishes the goals of his organization.

Weaknesses: None identified.

Prepared by: Amanda Jenkins
Colin Baenziger & Associates

CB&A Internet Research

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

[CB&A Note: We asked Mr. Molgaard about this case, and this was his response:

During my tenure as City Manager, I was named, by virtue of my office, as a Trustee with respect to certain forgivable home loans issued by/through the city. Apparently the taxes on this property were not paid by the owners and this is a notice to redeem. I, along with anyone else who was associated with this property, received this notice. I contacted the relevant persons at the City to be sure their interest was protected and was told I need do nothing and to not worry about this.]

Charleston Gazette-Mail
January 24, 2023

Legal Notices

NOTICE TO REDEEM TO: GLENN FORD, SHANNON FORD, STATE OF WEST VIRGINIA STATE TAX DEPARTMENT, CITY MANAGER OF CHARLESTON WV, **DAVID MOLGAARD** TRUSTEE, CITY OF CHARLESTON MOECD, CITY OF CHARLESTON, STATE OF WEST VIRGINIA WVDHHR, CHILD SUPPORT ENFORCEMENT SERVICE KEISHA MONIQUE AMOS, KEISHA MONIQUE AMOS, OCCUPANT, IRS ATTN ADVISORY CONSOLIDATED RECEIPTS WV STATE TAX DEPARTMENT, or heirs at law, devisees, creditors, executors, administrators, trustees, attorney in fact, representatives, successors or assigns, co-owners, occupant, other parties having undivided interest in the delinquent property, and other parties that may have interest in the subject property.

You will take notice that WVTJ LLC the purchaser of the tax liens on the following real estate: LTS 223-224 BEECHWOOD ADN RED OAK ST 1408 located in CHAS W District, Kanawha County, West Virginia, which was returned delinquent in the name of FORD GLENN & SHANNON and for which the tax lien(s) was sold by the Sheriff of Kanawha County at the sale for delinquent taxes made on the 15th day of November, 2021, as requested that you be notified that a deed for such real estate will be made to him on or after the first day of April, 2023, as provided by law unless before that day you redeem such real estate.

Link to the full case: <https://wvlegals.com/legal-notices-13546/>

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

<https://www.facebook.com/david.Molgaard/>
March 20, 2020

David Molgaard

It's hard to believe I have been with Bailey & Glasser for a little over a year now--and I couldn't be working with a finer group of people.

With the closing of dine-in restaurants, many of our neighboring businesses on and around Capitol Street have had to cease business--but there are a few that have chosen to stay open and provide carry-out dining for as long as they can.

As a way to support these neighboring establishments who are trying to make a go of it, Bailey & Glasser is encouraging our employees to patronize them by picking up their lunch tabs. It's also a nice way of saying thank you to our employees (both those who are required to report to the office and those who are doing their part to create social distance by working from home), for helping us to stay operational during this difficult time.

No one knows how long this situation will last, but true community is about helping each other through difficult times. I am happy to have landed in a place that understands that--and I hope you are in that kind of place as well.

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

Charleston Gazette-Mail (WV)
July 17, 2019

No one has crossed the bridge in 30 years and likely never - will again

Author: Rebecca Carballo Staff writer

Not one train or person has crossed the rail trestle that extends over the Kanawha River on the West Side of Charleston since the 1980s. Charleston Urban Renewal Authority board members inquired during a June meeting why the rail trestle hadn't been repurposed or demolished. It turns out the trestle has a host of structural issues that would need to be addressed before it were to be used again.

In 2003, the city of Charleston began talks about repurposing it as a bike trail. City Council had several studies and reports done on the trestle, and a coalition called The Friends of the Kanawha Trestle Trail formed in support of it. However, after a report came back saying necessary construction would cost \$17.5 million, the proposal died.

It came up again when the West Side Community Renewal Plan was presented to CURA in June. But James Yost and David Gilmore, the consultants working on the plan, said they don't recommend to use the trestle itself. Instead, they suggest creating a trail underneath the trestle using its right-of-way. However, Yost said these are all suggestions and that he has not been in talks with CSX.

During the presentation, Charleston City Council member and CURA board member Keeley Steele asked: "If it has all these structural problems, are we going to just leave it there? However, there isn't anything the city can do about it because CSX, a railroad company, owns the bridge. CSX did not provide comment after multiple inquiries from the Gazette-Mail.

The railroad company in 2006 offered to give the trestle to the city and to sell its 5 1/2 acres under fair market value. However, the city never acquired the trestle after the structural report came out. "The river piers are made of poor quality concrete by today's standards and are deteriorated significantly, according to the report. Inspectors found spalls (flakes) up to a foot deep, cracks and no evidence of steel reinforcement in the massive piers. There was also some damage underwater, according to a previous Gazette-Mail article.

The bridge was in fair condition, according to the final report, which the Gazette-Mail obtained through FOIA. But due to its large size, small repairs over the entire length add up to about \$13 million. If the city decided to paint it the grand total would be \$17.5 million. Earlier estimates indicated a much smaller price tag of \$3.2 million. A total of \$6 million was raised with state and federal grants and contributions from the city and businesses, said Dennis Strawn, a long-time supporter of the project.

The bridge was built in 1907, and 1956 was the last time any construction was done on it. Strawn said he believes this was recent enough. "The bridge was rehabilitated during or before all of the

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

major wars, Strawn said. "The federal government was throwing money around to make sure it was on good footing. There's minimal deterioration of that bridge. They built them to last.

If the bridge were to be converted to a trail, it would carry a much lighter load than it was initially designed. Originally it was built to carry 568,000 pounds over a distance of 104 feet, according to one of the several reports done on the bridge. This is six times more weight than the estimated amount needed for it to become a bike trail. But the reports indicated enough work needed to be done on it. The final price tag was just too high, City Engineer Chris Knox said. "It was just cost prohibitive, and it would cost even more now, Knox said. "I'd like to see it demolished or rehabilitated, but I don't think the City of Charleston will ever fund a \$20 million project there.

Strawn said the city did not need to pay to have all the repairs done at once. "We were going to open it up section by section, Strawn said. "The way these projects work is you put your foot in the door get public support and apply for grants, then ask for more and you get more.

However, then-city manager **David Molgaard** said it would be ill-advised and ultimately a large liability for the city. "It's not Charleston's issue; we never took possession of the bridge, and I think it would be foolhardy to do so without sufficient funding to rehabilitate it to the point we could actually use it for pedestrian or bicycle use, **Molgaard** said earlier this month. "Quite frankly, if we just acquired the bridge and try to piecemeal it then in my opinion, we would be faced with a very large liability.

If the City of Charleston acquired the bridge and could not come up with enough funding to rehabilitate it, then it would be responsible for the demolition, which could cost about \$7 million, **Molgaard** said.

Molgaard added that the trestle was supposed to be a part of a larger trail system. Instead of losing the grant money, they allocated it toward the bike and pedestrian trail along the Kanawha Boulevard, ultimately contributing to a trail system. "I think we made every effort we could to secure funding to make that project work, **Molgaard** said. "It just wasn't going to happen in the time frame we had available to use the money we had secured.

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David Molgaard
(Articles are in reverse chronological order)

Charleston Gazette-Mail (WV)
December 18, 2018

Charleston police chief, 11 others, out as Goodwin - transition takes shape

Author/Byline: Rebecca Carballo

At Charleston Mayor Danny Jones' final full City Council meeting, he announced a list of 11 people who will not be joining the next administration. He also announced that Charleston Police Chief Steve Cooper will be the new manager of the Charleston Sanitary Board come January.

The following people will be leaving with Jones: City Manager **David Molgaard**;

Mayor-elect Amy Goodwin plans to make announcements regarding some of the replacements over next few days, said Matt Sutton, Goodwin's chief of staff. Some positions won't be filled immediately. "We want to be able to get a sense of what the needs are as we look to create a more efficient city government, Sutton said.

This means some positions may be combined and even eliminated. However, positions cannot be completely eliminated until a new budget is drafted in fiscal year 2020 because that would take a budget amendment.

The changes in city leadership did not have anything to do with the individuals' job performance, Sutton said. "It was about finding people the mayor-elect knows and trusts to head Charleston in a new direction, Sutton said.

Outgoing City Manager **Dave Molgaard** said he knew of his status on Thursday. He said he wasn't surprised. "I met with her four times since the election, and I never got any indication that she was going to keep me, **Molgaard** said.

He doesn't know what he plans to do next, but said he looks forward to the future. "We're dusting off the sails, and I'm going to see where the wind takes me, **Molgaard** said.

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

Charleston Gazette-Mail (WV)
October 18, 2018

\$110M renovation is completed at capital city's former - Civic Center

Author/Byline: Rebecca Carballo

For the past 18 months, the Charleston Coliseum & Convention Center has been relying on two large customized tractor-trailers as kitchens. But now the facility, formerly known as the Charleston Civic Center, has a new state-of-the-art kitchen that is three times larger than the original. Operating out of a tractor-trailer was one of the many tactics the facility's staff used to stay open during the three years of construction. The renovations have been a long time coming for the 60-year-old staple of Charleston. The public will get to see the upgraded building Friday at a ribbon-cutting ceremony. The latest construction began in summer 2015, and the facility was slated to be finished six months ago. John Robertson, the general manager, said staying open was part of the reason for the delay. "We didn't have the luxury to close, Robertson said. "In Charleston, West Virginia, we have too many state and local groups that depend on us. If we close, they have nowhere to go.

Built in 1958, the last time any construction was done was in 2000, when the ice arena was removed from the then-Civic Center. Prior to that, no updates had been done since the coliseum opened in 1980. Charleston Mayor Danny Jones said the renovations were necessary and a long time coming. "Hotel operators have done a lot of remodeling and expansion here, so there was pressure to do something about the Civic Center, Jones said. "It was functional but, aesthetically, it looked more like a regional jail than a convention center. The renovations primarily focused on the convention center. There were 25,000 square feet added on for a ballroom, which can now seat up to 1,400 people. Before the ballroom could be built, though, the exhibit area would have to be transformed into a makeshift dining hall for banquets or black-tie events. This would involve rolling out carpet to cover the gray floor and putting up curtain walls to give it a more formal appearance.

Other aesthetic renovations and upgrades were made throughout the facility, including new furniture, carpet, outdoor space for cocktail parties and artwork, some of which was commissioned by West Virginia artists. There also have been some technical upgrades. The facility is now completely computer controlled, for functions like lights, heating and air conditioning. There also is more bandwidth for Wi-Fi. In some areas of the building, it will be free, but, in other areas, there may be a charge.

Another aspect of the renovations was creating a new lobby for the coliseum that is separate from the convention center lobby. "You can have monster trucks going on in the coliseum and a black-tie function in the convention space, City Manager **David Molgaard** said. "We called it the suits and the rowdies. The goal of the lobby was to separate two crowds. A common misconception about the renovations is that the coliseum went untouched, **Molgaard** said. There was no space added onto the coliseum part of the facility, but technical upgrades were made. "We did improvements on the lighting and sound system, **Molgaard** said. "We did a lot of things

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David Molgaard
(Articles are in reverse chronological order)

people don't see, which is why some people think we didn't do anything. He said there was no market research indicating that the coliseum needed to be expanded. It was the convention center that needed extra space. "We were losing a lot of meetings because it wasn't up to industry standards, and we didn't have the capacity, so they had to go other communities, **Molgaard** said. **Molgaard**, Jones and City Council members saw renovating the facility as a way to bring economic growth to the capital.

In February 2013, The Charleston Gazette Opinion page published an editorial in favor of renovating the facility, calling it an "economic engine that brings in an estimated \$580 million a year. It also said the facility lost about \$28 million in bookings because it can't accommodate some groups. "I think there was a clear recognition that the facility looked tired and dated, **Molgaard** said. "More importantly, there was a recognition that we could bring more people into Charleston and that this could be an economic driver for our community, if we were able to expand and update it.

In 2003, the City Council began to have "visioning sessions. One of the exercises was to imagine what they would want the newspaper headlines to be 10 years down the road. Renovations on the Civic Center made the top of most everyone's list. After doing some market research, it was determined that the facility would need 20,000 square feet of ballroom space and at least 5,000 square feet of meeting space. Silling and Associates came up with a rough estimate of \$20 million to add on a ballroom. The city discovered after more research that this was a modest estimate. There were about \$30 million in updates for the ventilation system alone, **Molgaard** said.

The city set up a design contest with three teams. The budget was expanded to \$60 million. **Molgaard** said this number was slightly optimistic, but a necessary benchmark. "If you didn't give them a target, who knows what they would be designing to, **Molgaard** said. "They could've designed the Taj Mahal, made out of marble and gold. Local firms BBL Carlton and ZMM Architects and Engineers, along with Atlanta-based firm tvsdesign, won the bidding with an estimated budget of \$72 million. **Molgaard** said this was the lowest cost of all the teams, but also the best design.

The facility was financed through a Tax Increment Financing (TIF) district and a half-percent sales tax. As of now, the total cost of the project is \$110,377,046.87. **Molgaard** said there were some unanticipated costs along the way, but those costs were funded completely by the city. "In the old days, you could have gotten outside money from grants, or from the state, Jones said. "But those days are over. So, we had to do it ourselves.

Robertson said the renovations were an investment worth making. They will help attract more conventions to the city and bring in more tourism. "The city already recognized what [the Convention Center] was, what it contributed to the community, Robertson said. "They realized what it would bring in, and this was probably the biggest bang for its buck.

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **David D. Molgaard** is listed below.]

Danville Register & Bee (VA)
April 23, 2018

As health insurance costs increase, city of Danville eyes clinic for employees
Author/Byline: John Crane

David Molgaard, city manager for Charleston, West Virginia, said his city has an off-site clinic for its employees run by a third-party provider, which saves Charleston more than \$500,000 per year. The city started it about a decade ago due to rising health care costs, **Molgaard** said. "We wanted to take a more pro-active involvement in trying to contain rising health care costs and also to provide benefits to our employees," **Molgaard** said. "We saw it in our best interest to create an environment where we could have a healthy workforce." An employee visit to the city's clinic — or wellness center — cost Charleston \$56.63 while a visit to a doctor outside the clinic cost \$121.01 in 2016, **Molgaard** said, citing the most recent figures for the city. Those costs have likely gone up, he added.

Molgaard said the city set up its plan so that employees could go to its wellness center during work hours without subtracting from their annual or sick leave. "It really helps our bottom line in terms of employee productivity," he said. "There's no billing involved. Our employees are not charged a co-pay or deductible and so that is a benefit to our employees." There's no overhead in terms of billing insurance, he added. It's covered by the city. "We're self-insured," **Molgaard** said. The city has about 98 or 99 percent usage and is looking to add hours because it's so well used, he said.

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

State Journal, The (Charleston, WV)
April 9, 2018

Changing course: Officials, business leaders look for ways to battle Capital City's shrinking population

Author/Byline: Rusty Marks

From 2016 to 2017, Kanawha County lost more than 2,800 people, according to a recent report from the U.S. Census. Of all the counties in the nation, Kanawha had the 10th highest population loss during that time period. That many people leaving the county means Kanawha lost about 1.5 percent of its 2016 population, which Census data show was estimated to be 186,097.

Christiadi, a research associate from West Virginia University's Bureau of Business and Economic Research who goes by one name, says Kanawha County's population loss is nothing new. "The population loss has been taking place since at least 2000, with one or two years of exemption," Christiadi said. "But more importantly, in the last three years the county has experienced a loss of more than 1 percent of its population each year. That's a big loss."

Continuous losses in population have created difficult situations for county and city governments, particularly the state's capital city. Charleston City Manager **David Molgaard** said the city's business and occupation taxes have remained stagnant for the past several years, hovering around \$40 million a year, and officials have been relying on one-time monies to help balance the city's budget.

Changes are also starting to appear in city employment. **Molgaard** said the city service fee — a \$2.50 weekly payroll deduction for people who work inside Charleston — is also bringing in less money than in the past. He said city officials had been estimating the fee based on a figure of 52,000 full-time workers in Charleston, but have revised that number down to 49,000. He's not sure if the drop in service fee revenue is due to people moving out of town or fewer people working because of the bad economy.

Longtime Charleston businessman Brooks McCabe, who is a columnist and consultant for The State Journal, said he is also seeing the results of a poor economy and shrinking population. "You can see it almost immediately in the city's budget," McCabe said. He said Charleston officials are caught in a cycle of decreasing revenue and an increasing need for city services. As more and more people lose jobs or become homeless, "they go where the services are, and the services are here," McCabe said. More people on the streets also mean more money spent on police.

Christiadi said Kanawha County's recent population change has coincided with the larger trend of the state's population decreasing. He said the majority of the county's population loss can be blamed on outmigration. This means there are more people leaving the county than there are coming into it. Some of those people, Christiadi explained, have gone to other nearby counties like Putnam and Jackson. Whether people move back into the area in the future "depends mainly

Internet – Newspaper Archives Searches
David Molgaard
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on what happens to the economy," Christiadi said. "We only rely on migration for a population increase, based on the age structure, because we are so high on the elderly population. In terms of natural growth, we continue to see the number of deaths outweigh the number of births. That's going to last for a while." "We've kind of got the double-whammy here in Charleston," McCabe said. Bad economic conditions combined with a shrinking population have created the worst of both worlds, he said. But McCabe sees that's changing. "What is happening right now is we've hit bottom and we're rebooting," he said. "This is an exciting time for anyone who has the perseverance to jump in and make a go of it."

Molgaard said Charleston needs to replace its aging housing stock and take advantage of its downtown to attract new residents and keep young people from leaving for other opportunities. "I think we have an eminently walkable downtown, with great entertainment venues and retail establishments," **Molgaard** said.

What the city doesn't have — and what many cities have successfully created — is downtown living space. "I've sat in on a lot of focus groups," **Molgaard** said, adding that, according to a 2015 study, Charleston needs to create affordable downtown housing. "People want to live downtown," he said. "They want cool apartments, and we don't have that in Charleston." **Molgaard** thinks adding a residential component to downtown Charleston will be one of the missing pieces to attracting new residents and convincing young professionals to stay in the area.

McCabe sees the promise of major growth on the horizon for Charleston and Kanawha County. He said an expansion of the Charleston Civic Center, set to be finished next year, will have a major impact on the city's image. A new library is supposed to open the following year. And McCabe expects hotels and office buildings to follow. "We're going to get through 2018. We will struggle through 2019. But 2019 will be the turn-around," he said.

In 2019 through 2025, McCabe said, the new petrochemical industry, based on the state's vast Marcellus and Utica Shale reserves, will really take off, and the region can expect to see a revived chemical industry, ethane crackers and a natural gas liquids storage hub come to fruition. "I'm optimistic," McCabe said. "I think the next 20 or 30 years, West Virginia and Charleston will experience growth faster than the rest of the U.S. The time to invest is when there are storm clouds. Now is the time for opportunity."

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

Charleston Gazette-Mail (WV)
March 21, 2018

Council approves \$100M budget

Author/Byline: Lori Kersey

In a special meeting Tuesday, Charleston City Council approved the city's \$100 million budget for the 2018-19 fiscal year beginning in July.

With revenue declining, the city is balancing the budget using \$3.8 million that had been put aside for the EDGE project with the Charleston Urban Renewal Authority. The project is on hold, City Manager **David Molgaard** said. The project, aimed at bringing young talent to town and providing them with affordable housing, would have meant renovating the long-vacant Dupont Hotel property at the corner of Summers Street and Brawley Walkway. CURA owns the property.

The second and third floors were to be used for the EDGE project, while the first floor was to be leased for retail and restaurant space. EDGE stands for Early Dynamic Guided Engagement. Under the program, sponsors could have subsidized rents at the facility for their employees while they participate in a three-year community leadership program.

The new budget also includes a \$3 increase in the city's refuse fee, which Council approved with a 21-6 vote at its regular meeting Tuesday. While Mayor Danny Jones has said the fee increase is needed in order for the city to continue distributing trash bags to residents each year, some council members have argued that the fee increase is needed regardless of whether council decides to continue buying the trash bags. The city last increased its refuse fee from \$10 to \$15 per month in 2002. Councilman Jerry Ware said if the city raised the fee just to keep up with inflation, the fee would be \$20.41 per month today.

Molgaard said the city's health care cost projections are up from \$13.1 million last year to \$17 million in this budget. Business and occupation tax revenue is down this year from \$45 million to \$43.5 million.

This year's budget also includes about \$1.5 million less for capital maintenance like paving and facility maintenance than last year, **Molgaard** said. The budget does not include raises for city employees but also does not include an increase in health care premiums, **Molgaard** said. The budget also includes adding a fifth ambulance for about \$473,000, **Molgaard** said.

Council will meet again at a special meeting in April to set the property tax levy rates, **Molgaard** said. **Molgaard** said the state must also approve the city's budget.

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

Charleston Gazette-Mail (WV)
May 2, 2017

City taps health care reserve to cover police, fire - benefits

Author/Byline: Ali Schmitz

The city of Charleston will dip into its health care reserve fund to pay for police and fire retiree health benefits. Charleston City Council voted Monday night to amend the city's 2016-2017 general fund budget to pay for \$2 million worth of retiree health benefits. Police retirees will receive \$1.2 million out of the fund, while fire retirees will receive the remaining \$800,000. The move brings the amount of funds in the reserve fund, which was created in 2005 after an increase in health claims, from \$9.7 million to \$7.7 million, City Manager **David Molgaard** said.

The city may also propose another similar budget amendment in excess of \$1 million.

Molgaard said the city pays about \$225,000 a week for health care claims. The city also has had to pay some significant claims over the past few months, including one \$800,000 claim, **Molgaard** said. He said that's not typical for the city. He said currently the active employee costs appear to be within the current fiscal year budget, but with 10 more weeks remaining in the fiscal year the city may have to dip into the reserve fund again.

The city budgeted nearly \$2 million more for health benefits for the next fiscal year. Benefit costs have gone up and down over the last decade, and **Molgaard** said it's hard to predict if claims will rise in the next budget year. If this is a spike and it goes back down, we should be in good shape, **Molgaard** said. If it's another year where these numbers start staying more constant, we're in a position to make a mid-year adjustment.

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

Times West Virginian (Fairmont, WV)
April 25, 2017

Charleston works on homelessness issue

The issue of homelessness in Charleston has become evident to residents and the city's leaders say they are struggling to solve it. The Charleston Gazette-Mail reports Mayor Danny Jones said Charleston is a mecca for people who have "taken over our streets." His comments came during a recent city council finance meeting and he has continued to discuss the topic on his local radio show.

City Manager **David Molgaard** says the goal is to improve Charleston and that the city isn't looking to cut funding for social services or hurt the homeless. One local nonprofit director has said Jones' comments were irresponsible and misguided. In January 2016 Jones ordered the dismantling of "Tent City" near the Spring Street Bridge where about 20 to 30 people lived in an encampment.

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

Charleston Gazette-Mail (WV)
March 22, 2017

Council OKs \$96.2 million city budget

Author/Byline: Unknown

In a minutes-long special meeting with no discussion, the Charleston City Council on Tuesday unanimously approved the city's budget for next year. The \$96.2 million budget, which the council's finance committee chairman has called "modest, is up more than \$1.6 million from the current budget.

Most of those increased expenditures will go toward resolving health care claims, most of which were filed by retired employees, according to City Manager **David Molgaard**. According to previous reports, of all the expenditures under personnel services, which include health care, retirement, wages and salaries, the total increase going into the 2017-18 fiscal year is about \$1.2 million. The spike in health care costs will be offset by about \$582,000 in wage and salary savings.

Molgaard said last week that the city previously budgeted employee positions at the top of the pay scale, but that it's no longer doing that. Instead, about \$400,000 will be set aside in a compensation initiative fund for considering future salary adjustments according to the city's performance management system.

There isn't much projected change in the city's business and occupation tax revenues, but the city is expecting property tax revenue to increase by nearly \$692,000.

The council will meet again at 7 p.m. on April 3.

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

Charleston Gazette-Mail (WV)
January 18, 2017

Jones seeks pay raise for next mayor, City Council

Author/Byline: Elaina Saube

Mayor Danny Jones wants a raise for his successor and the rest of City Council. Jones told members of City Council during Monday evening's Finance Committee meeting that he plans to recommend a pay raise for the incoming mayor in 2019, from \$100,000 to \$125,000 annually. Then, in 2023, Jones proposed, the mayor's salary would increase again to \$150,000. "The mayor still won't be the highest paid person in the city, Jones said. "There are people that wear uniforms who make more money than I do, and that's OK with me. Under state law, any changes in compensation for an elected official cannot be made during their current term, City Attorney Paul Ellis said. "If they made any change, it would take effect at the next election, Ellis said. The next city election is in 2019. Because he's not running for re-election, Jones noted that any salary increase for the next mayor won't affect him. Jones also proposed a pay increase for City Council members. Each of the 26 Council members currently receive \$200 for each meeting. Jones wants to increase it to \$250 per meeting. "This is all subject to an amendment from Council. You all can amend it if you don't like it, but if you decide not to do it, you can do that, too, Jones said.

Local attorney Charles "Rusty Webb also was sworn into Council on Monday to replace former Councilman John Miller, who resigned earlier this month, citing health issues. Webb will represent Ward 17, which includes most of Kanawha City. He will sit on the Parks and Recreation, Public Safety and Facilities committees. Council also approved a few amendments to the 2016-2017 budget on Monday. The first budget amendment is for \$354,000 in proceeds from the city's insurance provider, Brit Insurance Services USA, based on a claim the city paid to settle a lawsuit with former WVU basketball player Willie Akers after he received several injuries from a fall at the Civic Center in 2013. Another budget amendment for \$95,000 in revenue is coming from a settlement between the city and Ohio Valley Spray Foam, a company that the city sued in 2015 after numerous leaks were found at the North Charleston Community Center and the Martin Luther King Jr. Community Center, resulting in widespread water damage. Ohio Valley installed spray foam roofing at the centers in 2006 and 2007.

The city also recognized funds it received from the America's Best Communities competition after it failed to advance to the final round last year. "They actually gave us \$25,000 as a consolation prize for getting as far as we did in the competition, City Manager **David Molgaard** said.

The Charleston Area Alliance is receiving \$15,000 to go toward expenses for street fairs on Capitol Street. The city will put the remaining \$10,000 toward developing a strategy to market the EDGE project concept to prospective participants, **Molgaard** said.

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

Charleston Gazette-Mail (WV)
November 8, 2016

City Council shores up police, fire pensions

Author/Byline: Elaina Sauber

Charleston City Council voted Monday to allocate a portion of leftover money from the last fiscal year to help fund police and fire pensions. After learning earlier this year that the unfunded liability for uniformed police and fire employees hired before June 1, 2011 had increased by \$40 million from the previous year, the city went into crisis mode, Finance Director Joe Estep said. The Gazette-Mail reported on the increase last month when an actuarial study prepared by Gabriel, Roeder, Smith and Company estimated the plan's shortfall jumped from \$277 million to \$318 million. When city administrators began to close out the books for the previous fiscal year's budget, however, it became clear that enough money was left over to help supplement the city's contribution to the pension plans.

In a budget amendment that Council passed Monday, \$457,253 was allocated to the Charleston Police Department for pensions, and \$384,533 was transferred to the Fire Department for employee pensions. "We're fortunate that we had money to reallocate, because we basically manage very conservatively throughout the year in terms of how we budget, our pay scales, and that type of thing, City Manager **David Molgaard** said Monday evening.

A major reason for the jump in unfunded liability is because the company that prepared the actuarial study used updated information to gauge employee life expectancy. That data table hadn't been updated since 1994, Estep said. Because life expectancy is higher now than it was 20 years ago, it can be assumed the number of people receiving retirement benefits exceeds the number of those contributing to the plan, causing the estimated shortfall to increase. Also on Monday, Dr. Michael Brumage, executive director of the Kanawha-Charleston Health Department, gave an update to City Council's Finance Committee on the progress of the county's harm reduction program. The program provides clean needles to drug addicts who bring in their used needles for safe disposal, Brumage said, but that is just one aspect of the program.

Since the program began in December 2015, it has provided services to more than 1,200 people, Brumage said. They see about 20 new patients every week. "That returned needle is currency for them, for which they get new needles, Brumage explained. "Our patients tell us that they've actually seen the number of needles disappear from public spaces, because they pick them up and bring them in to use them for currency. On Monday evening, Jim Strawn presented this year's Live on the Levee 50-50 raffle contributions to five local charities. Covenant House, Manna Meal, the Religious Coalition for Community Renewal, Roark Sullivan Lifeway Center and the YWCA each received a check for \$1,528.

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

Charleston Gazette-Mail (WV)
October 24, 2016

SUSTAINABILITY IN CHARLESTON City has no set goals, - but still is taking significant steps

Author/Byline: Elaina Sauber

Unlike the nine cities profiled in a recent report from the National Academies of Sciences, Engineering and Medicine, Charleston doesn't have a clear set of goals or methods to help improve sustainability in the future. The report, which includes cities such as Pittsburgh, Philadelphia and Chattanooga, Tennessee, studied the different efforts they've made to bolster environmental, economic and social sustainability. While there's no cookie-cutter approach to making a city more sustainable, the report recommends cities should at least develop a plan that highlights their unique characteristics and adapt strategies that have worked in other places with similar traits.

Pittsburgh has not only an office of sustainability but also a climate action initiative that's been in place since 2008. The action plan outlined goals of a 10 percent energy use reduction in city-owned buildings by 2015 and a 50 percent reduction by 2030. Pittsburgh also buys 15 percent of its electricity from renewable energy sources, including solar, on its facilities.

But just because Charleston doesn't have a tenable plan or specific goals to increase sustainability doesn't mean it's not making efforts to be more energy efficient, City Manager **David Molgaard** said. "We do focus on, and are cognizant in everything we do, of the need to do things efficiently, **Molgaard** said. "If we can do that, that translates into being sustainable. One example of that, he said, is the ongoing massive renovation project on the Civic Center, the largest city-operated facility. The design-build for the nearly \$90 million project ensures the facility will be 30 percent more energy efficient, **Molgaard** said.

The city is also pursuing LEED certification, which stands for Leadership in Energy and Environmental Design, for the Civic Center once the renovation is complete. The certification is outlined in the report as one of the indicators of social sustainability. Charleston's efforts to improve energy efficiency aren't just limited to the Civic Center. Clarence Terry, a maintenance supervisor for the city's facilities, has helped implement various improvements to energy use in city-owned buildings. "[Terry] and his crew have been replacing [heating and cooling] units throughout the city with more efficient units, **Molgaard** said. They also replaced the boilers in City Hall with units that are up to 50 percent more energy efficient and updated the boilers at the Appalachian Power Park building at 601 Morris St.

In addition, **Molgaard** said the city is in the process of changing out all its light fixtures to light-emitting diodes (LED), which cut energy use by roughly 80 percent. The city has looked into transitioning its street lighting, but most of Charleston's street lamps are leased through Appalachian Electric Power, **Molgaard** said.

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

Another major piece of the sustainability report looks at improved stormwater infrastructure. Like many older cities, Charleston has a combined sewer system, which means buildings' sewage and used water is served by the same pipe system that collects surface runoff during rain events. Combined sewage overflows can cause serious water pollution issues, and the Charleston Sanitary Board is in the process of replacing the combined systems throughout the city. But that solution is expensive and takes years to complete. Cities can take advantage of shorter term "greening solutions that help retain rain water from overwhelming their sewer systems.

Philadelphia has made major strides to improve stormwater infrastructure. The city installed devices that allow stormwater to percolate into the soil whenever possible. Instead of non-porous surfaces that simply collected water, Philadelphia invested in vegetated basins to retain water, wetlands, planters, rain gardens and other devices. Over the past half-decade, Philadelphia "greened thousands of vacant lots and planted more than 120,000 trees to manage stormwater.

Molgaard said the upcoming one-mile bike lane that's planned for Kanawha Boulevard between Patrick Street and Magic Island will have "bioswales, or a green buffer that separates motor vehicles from the bike lanes. "They'll be engineered in a way to retain some of the water, he said. The area's clay-heavy soil also adds to drainage issues, **Molgaard** said.

Like many other cities, Charleston is also aggressively pursuing a "complete streets initiative to make city streets more accommodating to pedestrians and cyclists. The city of Pittsburgh, for example, has created a network of bike lanes around the city to encourage cycling, which means fewer emissions from motor vehicles. Chattanooga offers bicycles for people to rent, with pickup and drop off locations around the city.

Over the next decade, **Molgaard** said improving the city's bike network will be a major focus. "I think probably the most visible thing we'll be doing is implementing the pedestrian and bike master plan. That involves identifying and creating dedicated facilities for [those] activities throughout the city. In the long run, **Molgaard** said he hopes to see improved bicycle connectivity to Kanawha State Forest and South Charleston.

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

Charleston Gazette-Mail (WV)
October 18, 2016

Council to refinance Power Park bonds

Author/Byline: Elaina Sauber

Citing a drop in interest rates, Charleston City Council voted to refinance the city's bonds with the West Virginia Economic Development Authority on Appalachian Power Park during its meeting Monday. City Manager **David Molgaard** said the city is roughly halfway through its 20-year lease for the bonds. "By refinancing, we can save probably \$400,000 to \$450,000 over the remaining life of these bonds, he said. West Virginia Baseball, LLC., which owns the West Virginia Power, also makes payments on the bonds through a sublease with the city. The company asked to borrow additional money to update the ballpark's digital scoreboard. Those upgrades would cost between \$700,000 and \$800,000. "The team will actually be paying for the debt service on those additional moneys over the next 10 years, **Molgaard** said. The agreement also extends the city's lease with the team. "They wanted to make sure they were in that stadium for an additional five years beyond our 20-year lease with the team, **Molgaard** said. The team's lease payments for those five years will be reduced from \$250,000 to \$200,000, "but by that time, we'll have paid off the bonds, he added. "It's really a win-win for everybody, **Molgaard** said. The team's lease payments to the city primarily are used to pay off the bonds, which were granted in 2004 and used to pay for the ballpark's construction. **Molgaard** also discussed a change order to the Charleston Civic Center design-build project on Monday. The majority of a \$130,000 change order that Council approved is going toward streetscape changes on Clendenin Street outside the Civic Center. **Molgaard** said Clendenin Street will be reduced from four lanes to two lanes, with curb bump-outs installed on the side nearest to Charleston Town Center mall. A bump-out is an extension of a sidewalk into the street and is commonly used to shorten pedestrian crossing distances. **Molgaard** said workers will also install an elevated crosswalk, also known as a speed table, for pedestrians walking to the Civic Center from the mall. Another piece of the change order is for upgrades to the facility's air conditioning system, which was completed ahead of schedule due, in part, to the upcoming Garth Brooks concerts. "We had a choice of either expending money to make repairs on an old system that was going to get replaced in a few months, or spending that money to accelerate it by paying overtime for them to get the work done early for this concert, so we elected to just ... get it done early, **Molgaard** said.

Also on Monday, City Council voted to approve a \$23,000 purchase to Reviewsnap, a web-based performance management system that will be used to track and evaluate city employees. Charles Thompson, the city's Human Resources director, said the program "puts a mechanism in place to where our supervisors and managers can basically establish expectations and monitor the performance of their employees throughout the course of the next year. As the city works to bring the program online over the next few months, it will develop the criteria by which to evaluate employees. "The goal is to sit down with every employee and outline the criteria and expectations for the upcoming year so they're well informed about what's expected of them, **Molgaard** added.

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **David D. Molgaard** is listed below.]

Charleston Gazette-Mail (WV)
October 17, 2016

CHARLESTON City gives big raises after study

Author: Elaina Sauber

After the conclusion of a monthslong compensation study completed by an independent consultant, some city department heads received raises of more than \$20,000. City Manager **David Molgaard**, among those who received a significant pay raise, said he thinks the increases are warranted, based on the consultant's suggestions that many positions were underpaid. "We weren't keeping up with what the market would demand," he said. The compensation study, completed by Management Advisory Group International, LLC at a cost of \$43,000, sought to determine an "appropriate classification and compensation system and pay plan based on current compensation levels for similar public sector employers, municipalities, and local market competitors, according to the report's executive summary. Nearly all of the city's roughly 450 employees received some sort of raise after the study concluded.

The city had set aside roughly \$1.5 million, before the current budget was approved, to be allocated to respective positions pending the results. "Knowing this study was moving forward, we didn't know what the exact results were going to be, so we were committed to tailoring whatever outcomes that might have come out of that ... based upon funds we set aside, **Molgaard** said. About 12 percent of the total amount spent on raises went to 25 city department heads. **Molgaard** said the consultants determined new pay ranges based on what the positions are paid in the marketplace in other comparable cities, using a formula that took into account the new pay ranges and the years of tenure to help develop how much each employee's raise should be.

Civic Center General Manager John Robertson received the largest raise - \$32,600 -with a new salary of \$140,759. "His position experience was over 30 years, so that takes him automatically up to the top of the [pay] scale, **Molgaard** said. Robertson is the only department head who received the proposed maximum salary recommended by the consultant. **Molgaard** and City Attorney Paul Ellis each received raises of more than \$21,000. Their salaries are now \$168,500 and \$129,900, respectively.

Charleston Mayor Danny Jones said he doesn't take issue with any of the raises. "I think [**Molgaard**] would be impossible to replace," the mayor said Friday. "If you look around the country, he's a very active city manager and runs a big government in a capital city, and I have no problem with that." Jones added, "The more you pay people, the better people you get." **Molgaard** said originally, his position was not part of the compensation study. The consultants were asked to add it later on, rather than depending on market benchmarks provided by the International City Manager Association. "I felt it would be better if the consultants made that call," **Molgaard** said. "What we put in place is good for everybody ... based upon rational facts

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

and analysis." None of the raises were based on performance, **Molgaard** said, but they will be in the future. At the consultant's recommendation, the city is moving to an open range pay structure for non-uniformed employees. An open range structure gives raises based on performance as opposed to a step plan structure, which gives raises based on tenure.

When asked whether open range pay structures might be too subjective, **Molgaard** said the city's human resources department is looking into programs that would track and manage employees' performance throughout the year. "We will sit down with each employee and identify criteria by which they'll be judged, he said. That won't happen until early next year, and any future raises for employees are "at least a year away, he added.

Jones said that he also doesn't think performance-based raises will cause issues. "I'll be here two more years - I'll address any problem that comes from people if there's really a concerted effort to try to make changes, he said. The study marks the first time the city has adopted major changes to its pay plan and salary adjustments since the mid-1990s.

City department head raises

Most of the city's 25 department heads received raises following the conclusion of a compensation study done by Management Advisory Group International. The city set aside roughly \$1.5 million dollars from the budget's general fund pending the results of the study. Last month, City Council approved budget amendments to the general fund reflecting pay raises to each respective department. About 12 percent of the \$1.5 million went to raises for department heads.

Department	Name	Max. proposed	Original salary	New salary
City manager	David Molgaard	\$198,062	\$147,486	\$168,503

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

Charleston Gazette-Mail (WV)
August 22, 2016

Workshop to focus on universal design in Charleston

Author/Byline: Elaina Sauber

As city planners and community organizers search for ways to make Charleston a haven for both its aging residents and younger visitors, a set of concepts will drive that conversation at an upcoming workshop. Create West Virginia and Partnerships in Assistive Technologies (PATHS) are partnering with the RL Mace Universal Design Institute to host a two-day workshop on how Charleston and residents can benefit from adopting universal design concepts in construction and renovation projects.

Universal design is outlined in seven broad concepts that encourage infrastructure, buildings and environments that are accessible to everyone, including aging populations and those with disabilities. Those principles include equitable use of facilities (curb ramps), flexible use (accommodating right- and left-handed users), and low physical effort (door handles instead of door knobs).

The idea was first coined by architect Ronald Mace, describing it as making all products and the built environment aesthetic and usable "to the greatest extent by everyone, regardless of their age, ability or status in life. Sarah Halstead, co-founder of Create WV, said those principles can be used in Charleston and across West Virginia "to guide us as we prepare places, people and products for 21st century markets. "That will keep us authentic in our development and keep us from making mistakes other places have made, she said. The free workshops will run from 9:30 a.m. to about 5 p.m. on Aug. 30 and 31 at Taylor Books.

But the main goal of the sessions is to prepare Charleston for a collaborative conference at the Civic Center in May 2017 called Universal Design: Live and Learn. City **Manager David Molgaard**, who plays a major administrative role in many of Charleston's construction and infrastructure projects, is among those who will attend the workshop.

Molgaard said when he first read about universal design, "I was intrigued and struck with how similar it is to the things we've been moving toward with our vision for the city. **Molgaard** used City Hall as a prime example of where universal design could be used. To get to **Molgaard's** first-floor office via walker or wheelchair, a person must go around to the back of the building near the police department and take an elevator to the third floor to gain access to another elevator back down to the first floor.

But universal design goes beyond Americans with Disabilities (ADA) compliance. "It also takes into consideration the adaptability of environments ... it's not just designing for one group of people, it's designing for everyone, she said.

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

Charleston Gazette-Mail (WV)
March 23, 2016

City Council OKs \$94 million budget

Author/Byline: Elaina Sauber

The 2017 fiscal budget is the strongest **David Molgaard** said he has seen since he began as city manager more than a decade ago. "We've had a number of good budgets, but this one is right up there, he said. It took City Council less than five minutes to pass the next year's budget on Tuesday, which outlines a \$5.6 million revenue increase from business and occupation taxes, the increased city service fee and sales tax hike. With a \$94 million budget for the next fiscal year, the city is anticipating a nearly 23-percent increase in user fee revenues, or an additional \$1.25 million. The total \$6.7 million generated from the user fee goes toward street projects and police services. The half-cent sales tax increase to help fund police and fire pensions will generate another \$2.6 million. That increase left enough money in the current general fund for the city set aside in a pending account as it waits for the results from a compensation assessment.

While last year's budget included a 4 percent across-the-board raise for city employees, **Molgaard** said the city hired Virginia-based Management Advisory Group International to lead that assessment in September. The city paid the firm \$43,000 to complete the assessment, which included giving non-uniformed employees questionnaires to understand what their positions entailed, benchmarking those positions with comparable cities and then making recommendations with regard to salaries and pay ranges amid current market conditions, **Molgaard** said.

Once the assessment's recommendations are finalized, the city will amend the FY 2017 budget and allocate the \$1.9 million in its pending account to the appropriate departments. "When pay ranges aren't broad enough, people rise to the top of the pay scale, with nowhere to go except for applying for another position internally or leaving our employment for [somewhere else] that pays market rates, **Molgaard** said.

The city also is projecting more than \$45 million in B&O taxes in FY 2017 - a 2.5-percent increase from last year. City Finance Director Joe Estep said B&O taxes, which are collected from gross revenues on a quarterly basis, comprise nearly half of the entire budget. Utilities such as electric, natural gas and water companies pay the highest B&O tax rates, between 3 and 4 percent, Estep said. The city also is paying nearly \$240,000 less into its Public Employees Retirement System due to a lower required contribution rate. The retirement system's board specifies annually how much the city must contribute to its retirement fund for non-uniformed employees, Estep said. That rate, which was 14.5 percent this year, was lowered to 12 percent for fiscal 2017. Mayor Danny Jones said the bolstered budget is the result of good planning by city officials. "We feel like an oasis of financial tranquility, he said.

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

Charleston Gazette-Mail (WV)
January 5, 2016

User fee hike to bring \$1.3M more to city

Author/Byline: Elaina Sauber

The recent increase to Charleston's city service fee is projected to add more than \$1.3 million in revenue in the next fiscal year. City Council's Finance Committee voted Monday night to amend the fiscal 2016 budget to reflect a 50-cent increase to the city service fee. The service fee, also known as a user fee, will now charge \$2.50 per week to everyone who works in the city limits, regardless of residency.

City Manager **David Molgaard** said at the meeting that the amendment will budget about \$620,000, or six months worth of that increase for the remainder of the fiscal year ending June 30. About \$18,000 of that will go toward replacing a police vehicle that was totaled in an accident, **Molgaard** said. The user fee, which previously brought in more than \$5 million in annual revenue, may only be used for street maintenance projects or police services.

City Finance Director Joe Estep explained after the meeting that roughly \$1.65 million is allocated from user fee collections and placed into a capital outlay projects fund. That money is used for the city's annual paving program as well as retaining wall and slip repairs. "If any of these things affect the stability of the road, then it [comes from] the user fees, Estep said.

The user fee also covers the cost of smaller projects such as potholes and curb repairs, as well as purchasing salt and snow removal. "We pay \$450,000 to buy salt every year, and last year it cost us \$200,000 in manpower to put it down, Estep said. The remaining money from user fee revenue stays in the general fund and is meant to offset expenses relating to street maintenance or police services.

Estep said when he puts together the fiscal 2017 draft budget, the increased user fee revenues will likely project around \$6.7 million. "Then, council will decide how they want to divvy that up, he said.

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **David D. Molgaard** is listed below.]

Charleston Daily Mail (WV)
March 18, 2015

Charleston Area Alliance's community awards announced

Author/Byline: Unknown

Fourteen businesses, groups and people were honored by the Charleston Area Alliance at the eighth annual "We Love Our Community awards.

"We are honored to shine a spotlight on the best of Charleston, said Susie Salisbury, the alliance's vice president of community development. "These awards highlight outstanding community commitment and showcase exemplary development projects. Their work and dedication helps build a more vibrant community and prosperous economy.

The awards are sponsored by City National Bank. Winners include:

* Servant Leader Award: **Dave Molgaard** was honored for his outstanding leadership as a public servant in the Kanawha Valley. **Molgaard** has served as Charleston's city manager for more than 10 years and spearheaded many economic development projects for the city, most recently the EDGE project which focuses on attracting young talent to the city.

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

Charleston Daily Mail (WV)
March 10, 2015

CHARLESTON CITY COUNCIL Council passes \$89 million - budget

Author/Byline: Matt Murphy

Charleston city council passed the city's \$89 million budget for fiscal year 2015-16 Monday night, but first discussed budget amendments concerning pay raises, Main Street groups in the city and libraries. Council ultimately voted to go along with the mayor's administration's pay raise option, which will give all regular city workers a 4 percent raise - the first raise since 2012. The other option, introduced by East End Democratic Councilman Robert Sheets, would have given every employee a flat \$1,600 wage increase.

Sheets said that increase was meant to provide a greater financial boost to workers who make less money and commented that many city administrators make more than higher-ups at the county and state levels. In addition, as the cost of living increases, lower-income workers are affected more than people who make more money. "It hurts those who don't have very much income he said. However, City Manager **David Molgaard** said across-the-board percentage raises allow the city to be competitive in keeping and retaining talent. The city uses a pay grade classification system for employees. "Our philosophy is pay grades reflect skill level and duty level, he said. **Molgaard** also said the city is below the national median for wages for various positions, ranging from refuse workers to its traffic engineer, though **Molgaard** also said that doesn't factor in other factors like cost-of-living.

Council's Finance Committee voted down Sheets' proposal. Also in Finance Committee, West Side Democratic Councilman Ed Talkington wanted to give West Side Main Street and East End Main Street equal funding to the tune of \$50,000 for each organization. Currently, West Side Main Street receives \$30,000 from the city, while East End Main Street receives \$50,000. The contribution is higher for East End Main Street because West Side Main Street can receive funding through West Virginia State University. However, both organizations are in the middle of a possible merger, and West Side Main Street President Adam Krason said his organization isn't requesting any more funding for the time being as the merger moves forward. In addition, Mayor Danny Jones said he will be asking the Charleston Urban Renewal Authority to start contributing more to both organizations. "I think it's time CURA ponied up, he said. "CURA's got the money. We don't. The extra funding for West Side Main Street ultimately was killed along neighborhood lines in Finance Committee, with Talkington and West Side Democrat Joe Deneault voting for the extra funding and South Hills Republican Bobby Reishman, South Hills Democrat Jack Harrison, At-Large Democrat Jerry Ware, South Hills Republican Susie Salisbury and At-Large Republican Tom Lane all voting against. Council also voted to give an extra \$3,200 to the county library system in light of the receipt of a new valuation report from the Kanawha County Assessor's Office, which affects the formula used to determine the city's contribution to the library.

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

Charleston Daily Mail (WV)
November 4, 2014

CHARLESTON CITY COUNCIL Sales tax hike approved - Rate will increase by one-half cent beginning on July 1 \$%

Author/Byline: Matt Murphy

The sales tax rate in Charleston will go up next summer after city council passed a one-half cent tax increase Monday night. Earmarked for the city's pension liability, the new tax will take effect July 1. At that time, the effective sales tax rate in Charleston will be 7 percent - the 6 percent state sales tax, a one-half percent city sales tax for renovations to the Charleston Civic Center and the new one-half percent sales tax for pensions.

The tax wasn't without dissent. Eight council members voted no to the tax. They are at-large Republican Chris Dodrill, West Side Republican Adam Knauff, South Hills Democrat Sam Minardi, West Side Democrat Mike Nichols, South Hills Republican Courtney Persinger, East End Democrat Robert Sheets, East End Independent Cubert Smith and Oakridge Democrat Shannon Snodgrass. Republican Susie Salisbury and Democrat Mike Clowser, both of whom represent South Hills wards, were absent.

City Manager **David Molgaard** and Mayor Danny Jones said if the tax was not passed, the city would end up seeing major service cuts in the future. "Without any new or other sources of revenue, we would have to cut expenses somewhere, **Molgaard** said, going on to add, "I believe that if you didn't pass this tonight, we might be able to ... finagle this for the net three years ... but it's going to hit you that much harder.

Charleston has been struggling to find revenue to pay for an estimated \$287 million pension liability. The city is currently enrolled in a "conservation method to meet its pension obligations the fourth proposal introduced by the state government in the last three decades to enable local governments to fund their pensions. The city already pays about \$10.8 million annually to fund existing pension liability. That obligation will end in 2047, when the trust fund is fulfilled for pensions created before the city began its current funding method, city finance director Joe Estep said.

However, that payment won't cover future pension obligations. "Everybody who's retired since the conservation methodology, the sales tax will cover those benefits, **Molgaard** said. The tax is expected to generation \$6.3 million in the first fiscal year it's enacted, and is currently projected to cover pension costs through 2027. At that point, the city will likely need to find an addition funding source unless the sales tax ends up pulling in more revenue than projected. "I don't want to say at this point this is the silver bullet, but it could be, **Molgaard** said. Elsewhere in West Virginia, Wheeling is following the lead of Charleston as its council considers a similar tax increase for pension obligations.

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

State Journal, The (Charleston, WV)
October 31, 2014

WV Supreme Court finds in favor of City of Charleston in dispute over overtime pay calculations for firefighters

Author: Unknown

The City of Charleston was within its rights to change the way it calculates overtime pay for firefighters, the state supreme court said. The opinion, authored by Justice Margaret Workman, noted that the firefighters had not provided the court with evidence suggesting the city was contractually bound to calculate overtime compensation in a particular manner or using a certain formula. "This Court has thoroughly reviewed the information provided in the record, and we discern no legitimate basis upon which to conclude that the mathematical formula previously used to divide annual salary into hourly wages created a contractual obligation to use that same formula into perpetuity," she wrote.

The case stems from a change the city made in its overtime calculations in 2011 after City Manager **David D. Molgaard**'s determined they had been using the wrong baseline hourly rate to calculate overtime "and had actually been compensating the firefighters at a higher overtime rate than required." According to his calculations, the city had overpaid as much as \$1.4 million.

The Firemen's Civil Service Commission declined to intervene on the firefighters' behalf, saying their powers are limited to disciplinary proceedings, while a federal judge rebuffed the city's bid for a declaratory judgment, saying there was no controversy under the federal Fair Labor Standards Act.

The firefighters then appealed to Kanawha County Circuit Court, which in June 2013 ruled against them. On Oct. 30, the supreme court upheld the lower court's decision, citing legal precedents that state "a municipality's past practice relating to calculation of overtime pay does not create a contract; that such calculation could be unilaterally altered, with notice; and that the municipality is permitted to revoke or alter policies."

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

Charleston Gazette (WV)
August 18, 2014

Councilman wants to amend higher sales tax bill

Author/Byline: Rachel Molenda

One Charleston city councilman warns that revenue from a proposed increased sales tax could be used for projects other than funding the city's unfunded police and fire pension plans. However, City Manager **David Molgaard** says that's not the case.

East End Councilman Robert Sheets submitted an amendment to a proposed bill that would increase the city's sales tax to 1 percent. Sheets said one section of the bill would provide a "loophole for the city to eventually divert funds from the planned uniform pensions reserve fund to the general fund as it pleases. "My thing is they eliminate that whole clause so that all of it goes to pay what they purport they are doing it for, is to pay down the unfunded pension liabilities, said Sheets of his amendment, which asks to strike the clause in question.

Molgaard addressed questions and concerns regarding the language in an email to council members last week. In his memo, **Molgaard** said the bill allows for the city to use excess revenue from the fund "when the closed plans are fully funded and the City's only remaining obligation is for contributions to the new plan for the new hires after June 2011 & **Molgaard** added that those funds must be used to cover the city's contributions for the new plan before it could be diverted for other uses. Mayor Danny Jones proposed raising the city's half-cent sales tax at the Aug. 4 City Council meeting in order to save money for its unfunded fire and police pension plans.

The Gazette reported last week that council members will have only one chance to make amendments to the bill. It will be considered and voted upon by the Finance Committee tonight and then sent to the state's Home Rule Board for approval. The process doesn't sit well with Sheets. "They've done it so that & even council members can't touch it unless they're on the finance committee. The only way the finance committee's going to change is if enough people call them and say they want all this money to go to the unfunded pension liability, Sheets said. But Sheets acknowledged that potentially missing the July 1, 2015, implementation date while waiting for the bill to be passed by full council would be problematic. "If we stop and add this now we lose out for another year or something on it. And they'll vote for it not adding this amendment, Sheets said.

Molgaard told city officials the state's tax department starts new city sales taxes on July 1 every year, and a delay on the bill could mean a year of lost revenue. There is nothing in state code that requires cities to vote on a proposed bill before submitting it to the board, which **Molgaard** said "might be a defect in the process that should probably be addressed at some point, because a late amendment could delay any ordinance's passage. The Finance Committee meets tonight at 6:30 p.m. in the AV Conference Room, on the third floor of City Hall.

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

Charleston Daily Mail (WV)
June 17, 2014

CHARLESTON CITY COUNCIL Decade of late taxes to go to - projects

Author/Byline: Matt Murphy

A Charleston firm has paid up after failing to pay business and occupation taxes for 10 years, and city officials plan to use the money to pay for facility maintenance and other projects. In all, the business, which city officials would not identify, has paid the city \$3.8 million. About \$1.5 million was penalties and interest. City Manager **David Molgaard** said two tax audits revealed the unpaid funds. He would not give much information about the business in question, saying that the business could be easily identified if just a few details were given.

City code Sec. 110-85 prohibits the city from publicly releasing individual business and occupation tax returns. "It was something that we found that wasn't on our radar, he said. "It was somebody that wasn't paying at all . . . it's a peculiar case - a very unique one.

Molgaard proposed putting the lump sum into the facility maintenance fund for specific projects. Council members voted unanimously in favor. "We want to spend it for one-time needs, **Molgaard** said. He said funds could be used to re-sod the field at the city-owned Appalachian Power Park or to help jumpstart the Edge housing project.

Championed by **Molgaard**, the Edge project is a proposed mixed-use building downtown that would provide housing to young professionals who would also be enrolled in a city leadership program. "That piece of that chunk will help us get to the next step, **Molgaard** said. "I think it stands a good chance of happening.

In other business, council:

* Approved budget amendments, which included the \$3.8 million B&O tax sum and a new employee for **Molgaard's** office. The employee will be an "executive projects administrator who will receive a salary of \$89,116, or \$117,140 if the cost of benefits is included. **Molgaard** said the employee is needed because of the large amount of projects the city is undertaking. He said the city has greatly increased efficiency in operations over the last few years, which helps justify the new employee. "There's just not enough hours in the day for everything coming at us, he said, later adding, "It's a good problem to have.

At-large Councilman Jerry Ware, a Democrat, said he was initially skeptical of the hire, but supported the new employee after talking to **Molgaard** earlier Monday. "When I saw it on (the agenda), I questioned it big time, he said. "I really feel comfortable about this.

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

Charleston Gazette (WV)
May 5, 2014

City catalyst: EDGE project moving forward

Author/Byline: Rachel Molenda

The construction of the Charleston EDGE building could be part of the redevelopment efforts on the North end of Capitol Street, a recommendation of the Imagine Charleston downtown plan. City Manager **David Molgaard** said it "could really serve as a catalytic project. "We've done a great job over the last 20, 25 years with Capitol Street from Washington Street to the river. It's the first place you take a visitor when you bring them to Charleston, **Molgaard** said. "But, by the time you get past the Daniel Boone, there's just a lot of vacant lots.

The EDGE - Early Dynamic Guided Engagement - project focuses on attracting young talent to the city and providing them with affordable downtown housing. Sponsors could subsidize rents at the facility for their employees while they participate in a three-year community leadership program. **Molgaard** said the idea is to get young people to come up with a high-impact project they would implement over the course of that time. "You're not only living downtown, but you're living downtown with a purpose, **Molgaard** said. "You're making things happen, and you're contributing in a way that isn't available right now in any organized fashion at least. There's a value to that.

The project, which has a grant from the Greater Kanawha Valley Foundation for design and cost estimates, outlines new construction for the housing complex on Donnally and Capitol streets. The building would contain 35 units - seven of which could be two-bedroom apartments - along with program and meeting space, a fitness area and an amenity deck that sits atop ground-level parking. It would be within walking distance of many of the city's anchors, including the Capitol Market, Appalachian Power Park, the levee and the Civic Center. It's also two blocks away from some of the city's popular restaurants and nightlife.

Not counting land costs, the project's development costs are estimated to be \$10.4 million. Rents would have to be more than \$1,300 per month. "When you add utilities, renters' insurance, sewer and garbage & you're looking at number of around \$1,730 a month, **Molgaard** said. But, **Molgaard** said that's all the more reason for the city to "buy down or have sponsors that would subsidize some of those costs. "It might be doable for the middle-aged attorney or doctor in this market, but people around here aren't conditioned to those type of rents, **Molgaard** said. That also proves to be challenging when it comes to developing the building, **Molgaard** said. ZMM's analysis showed Charleston's land costs are high. Buildings like the one conceptualized appraise lower than their construction costs, "so you're already upside-down when you're building one of these things. At a presentation of the project's latest plans, some Generation Charleston members who aren't from the Charleston area weren't phased by a \$1,300 rent, **Molgaard** said. Those who were from the area were looking for lower rents around \$800 or \$900, "which is what we expected, **Molgaard** said.

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

The next phase of the project includes approaching potential sponsors that could be businesses, individuals or foundations looking to bring young talent to the city. Recruiters like the "stickiness of the idea, **Molgaard** said. "[They like the idea of] attracting people and finding something to keep them here, instead of having this be their first job and then they're off to the big city after they get a little experience, **Molgaard** said. "If you find a way to ground them in the community, it's more likely that those young people will stay here.

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

Charleston Gazette (WV)
March 11, 2014

Stabilization fund helps city cushion '15 budget

Author/Byline: Rachel Molenda

In the wake of a projected \$2.9 million shortfall at the end of this fiscal year, the city of Charleston is dipping into its stabilization fund to increase projected revenue in 2015. That money - nearly \$1.1 million - will act as a kind of cushion for next year's budget, which was reviewed Monday evening during a special Finance Committee meeting. "It could be that we never have to use the stabilization fund," City Manager **David Molgaard** said.

Prior to having the stabilization fund, the city balanced its budget by having an "opening balance," which assumed there would be a certain amount of money left over at the end of the year that could be used for the one following, **Molgaard** said. "That was starting to look like a dangerous game, because you might end up in a situation like we're in this year ... as the money that we had rolling over starts dwindling," **Molgaard** said. "Now we're at least in a position where we've got the money in the bank." The city last did this in 2013 when it used \$1,544,000 from the fund, which holds about \$5.2 million in emergency funds for the city. This year's proposed transfer accounts for about 20 percent of the fund.

City Finance Director Joe Estep told committee members the city's top 10 revenue sources have fallen flat this fiscal year with only 0.9 percent growth over 91 percent of the city's revenue stream. The city's business and occupation tax - its number one revenue stream - is projected to be about \$1.9 million under budget. The Gazette reported earlier this month that B&O collections, which are based on money businesses in the city take in, have been flat all year.

Property values are lower than expected, which has lead to low revenues from the city's property tax. The city depends on several hundred thousand dollars that property tax - its second largest revenue source - goes up each year. The proposed budget accounts for increased revenue from property taxes, which the city is allowed to increase by 3 percent without holding a public hearing, Estep said. Property tax is the city's second largest revenue source. The tax rate for residential properties would increase from 16.22 cents per hundred dollars of assessed value to 16.98 cents. "On our typical example of a \$100,000 appraised property, which gets assessed at \$60,000, this would increase the annual taxes \$4.66," Estep said. Annual taxes for a Class IV or business property would be about \$9 under the proposed increase. Hotel occupancy taxes - its third-highest revenue stream - are projected to fall short by about a half-million dollars.

Estep's proposed budget takes into account some cutbacks, most of which are in professional services. The Storm Water Management Department found ways to scale back spending for 2015 by about \$300,000 while still being in compliance with federal guidelines. The City Manager's office managed to reduce its budget by \$200,000. 2015 is a big spending year for the city, Estep told The Gazette. The proposed budget addresses increased expenses, such as \$400,000 for city elections, \$500,000 for uniformed pension plans and \$400,000 for its employee health clinic.

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

But, additional money spent on the city's employee health clinic to expand hours are expected to be balanced by decreasing health insurance claims, **Molgaard** said. The proposed budget doesn't include raises for city employees this year, but **Molgaard** told committee and council members who attended Monday's meeting that finding revenue for raises needs to be addressed. City employees have received a raise once in the last five years, **Molgaard** said.

A five-year projection showed a 3 percent raise for each city employee would require the city to come up with nearly \$6 million in additional revenues. But spending is expected to increase by more than \$17 million by 2019. "If we don't keep up 3 percent across the board, at some point we're going to turn around and give a 9 percent or 12 percent raise just to catch up," **Molgaard** said, of a historical analysis of city wage raises during revenue droughts. A projection without raises showed less of a daunting cumulative gap between spending and revenue, but **Molgaard** said it wouldn't bode well for operations. "This would take us out another five years, and there's just no way you're going to operate 10 years without raises for employees," **Molgaard** said.

City officials might have to consider raising city fees to make up for low revenues. **Molgaard** said several significant city fees haven't been raised in a number of years, such as fire fees in 1988 and refuse fees in 2004, despite city code that says Council should raise fees in order to cover service costs. Individuals and entities would have to be charged \$5 more - a 33 percent increase in fees - in order to cover the city's current costs, **Molgaard** said.

"Unfortunately, I think everybody thinks what they're paying is what it costs, and it's not," Finance Committee Chairman Bobby Reishman said. "We're just going to have to look at it, but we're going to have to be reasonable."

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

Charleston Gazette (WV)
October 23, 2013

Revenue falling short of projections, Council transfers - funds to close gap

Author/Byline: Rachel Molenda

A budget analysis by City of Charleston Finance Director Joe Estep shows the city's budget turning up about \$500,000 short of what was expected, according to City Manager **David Molgaard**. A budget amendment was passed at Monday night's City Council meeting that allowed \$540,000 of unassigned funds to be transferred to the city's stabilization account, a decision **Molgaard** described as "prudent" should revenue continue to decline. Last year, the city chose to use its unassigned funds for across-the-board raises for its employees, **Molgaard** said

While Estep's budget projections showed an increase in revenue for this fiscal year, the numbers aren't showing through. "In the face of declining revenue compared to last year and raising the budget this year, we've obviously created a shortfall," Estep said. In addition to low general revenue, **Molgaard** said the city's business and occupation tax has brought in fewer funds this year when compared to April through June of 2012. Estep said it is down about \$144,000 by comparison. "At the same time, it's down \$591,000 compared to the current budget," Estep said.

B&O taxes are paid by individuals and entities, which do business in the city, and make up about half the city's \$87 million budget, according to Estep. The amount collected is based on gross revenue, Estep said. If business isn't booming, neither is B&O revenue. "People aren't spending their money," **Molgaard** said. The majority of B&O tax revenue comes from retail, services and contractors sectors, Estep said. The service sector - professions such as doctors, lawyers and accountants - brought in \$215,000 less revenue than in 2012, contributing to the shortage, according to Estep. The financial outcome of the B&O tax is difficult to gauge at this point, Estep said. "Because that's a quarterly, self-reported tax, we're not going to be able to tell how the July, August, September business period went until we collect those taxes," Estep said. "It'll be mid- to late November before I have any feel of what this quarter's going to look like." Hotel/motel tax revenue in Charleston is also falling short by about \$140,000 compared to June through August of last year, according to Estep.

Molgaard said the city is looking to long-term solutions to low revenue issues by continuing "to monitor our revenue situation, but we are also closely looking at our expenditures." "We know our obligations are going to increase," **Molgaard** said, making reference to the city's unfunded liability to police and fire pensions. "We're going to have to do business more efficiently and effectively to meet our obligations." This shortfall in revenue could be temporary, but, for now, the city is playing it safe with its finances, **Molgaard** said. "We don't know if it's just a dip that will correct itself or that it will continue," **Molgaard** said. "Right now, I think we've got enough room in our current budget to absorb this current downturn."

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

Charleston Gazette (WV)
January 1, 2013

THE SHAPE WE'RE IN 'We knew we had to move to - prevention' Old city insurance was almost bankrupt

Author/Byline: Kate Long

In 2005, "Charleston's insurance plan was going bust," said City Manager **David Molgaard**. Employees had filed a million dollars more in claims than the city's insurance company had predicted. The next year, employees got a raise, but also got hit by an insurance premium hike that almost wiped out their raise. "We analyzed the claims," **Molgaard** said. "Most were connected to preventable illnesses, such as diabetes and heart disease, so we knew we had to move to prevention." They decided to get creative: start their own employee clinic and pair it with an aggressive wellness program. They dropped Wells Fargo, became self-funded and contracted with Healthstat, a company that provides workplace clinics. They started requiring employees to get checkups. "The first year we required risk assessments, we found six people who didn't know they had diabetes," **Molgaard** said.

In 2009, they added lower-cost pharmacy and mental health benefits. They cancelled the city's \$400,000-per-year stop-loss insurance and put the money in a medical reserve fund instead. They limited claims to \$750,000. "We've never had one that big," **Molgaard** said. By 2010, their claims were below the national average. Claims and administration costs per employee decreased 2 percent in Charleston while the national average increased 24 percent, according to Aon-Hewitt, employee benefits consultant. "But we know it would only take a small transplant to blow our numbers out of the water," **Molgaard** told the Gazette in 2011. In 2012, it happened. Nineteen employees filed large claims, mainly for cancer, of over \$100,000. "Any plan will hit a spike in claims," **Molgaard** said. "The question is, how prepared are you? We got through this year without having to dip into our medical reserves. That's good. Over time, we'll still beat the national average."

With the big claims, Charleston is over the national average per employee for 2012. But without them, the city is still below the national average. "The underlying basics are working," **Molgaard** said. "In the long haul, we'll pay less." "Our pharmaceuticals went up just 4 percent. You want an increase. That means people are taking their insulin and medicine. It costs a lot less than the alternative."

Since 2010:

- Employees are given a steep discount (24 percent) if they visit the clinic as often as required. "That's a real incentive," **Molgaard** said.
- They can schedule consults with a pharmacist through the University of Charleston's PharmUC Patient Care Clinic.
- The city offers options such as gym, yoga, zumba, and Weight Watchers.
- Unnecessary ER visits are now slapped with a co-pay.

Internet – Newspaper Archives Searches**David Molgaard*****(Articles are in reverse chronological order)***

Construction manager George Farley likes the emphasis on fitness. "This is the first place I've ever worked where the management cared whether I was in shape or not," he said. "I spent a lot of years in the coal industry, which has good insurance, but they'll give you a pill and send you down the road. They don't do a lot of assessment of how good a shape you're in. They don't talk to you about what you can do for yourself. And that's important to me now."

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

Charleston Daily Mail (WV)
August 23, 2012

Official outlines plan to attract younger workers to city - Molgaard says having employers pay subsidy for apartments keeps - rent low, allows for house loan

Author: Paul Fallon

Building an apartment complex on the site of the former Holley Hotel would be just one part of City Manager **David Molgaard's** plan to attract young professionals to downtown Charleston. **Molgaard** outlined his plan for members of the Greater Kanawha Valley Foundation during a luncheon meeting Wednesday. "This is about the Holley Hotel and so much more," he said.

The plan calls for businesses to recruit young professionals who want to move to Charleston and live in the downtown area. They would live in two-bedroom apartments in a complex that would be built where the Holley Hotel used to stand along Quarrier Street, near the present day Quarrier Diner. "Younger people are saying it would be great to live downtown but the rent is just too high," **Molgaard** said.

To keep rent affordable, employers would pay a \$10,000-per-year subsidy per employee under **Molgaard's** plan. The employee would be asked to pay what **Molgaard** called "fair market rent" for the apartment. The rent amount would probably be around \$700 a month, he said. Half of the employer subsidy would help cover the rent and pay for maintenance of the apartment complex. The other \$5,000 would be placed into an account that would build up over three years. Employees would stay in their apartments for a maximum of three years so the account would accrue \$15,000 per employee, **Molgaard** said.

This \$15,000 then would be loaned to the employee to help pay for the purchase of a house in Charleston, he said. The loan would be forgiven if the employee lived in the house for three years, **Molgaard** said. If the employee moved out of the house, the loan would have to be repaid, he said. Employees would be required to sign leases every year of the three-year period. Neither the employee nor the employer would be penalized if the employee left the company before the three years were up. The businesses could explore whether the subsidy would be considered part of the employee's salary, **Molgaard** said.

New restaurants and shops have opened downtown, and events like the Live on the Levee concert series and SportsFEST add to the city's attraction, he said. "There's a lot happening," he said. "But we need to get more people downtown to take this to the next level. After hours we don't have that critical mass of people downtown."

The plan is being drafted, and **Molgaard** did not have specific details, including how much the apartment building would cost to construct or how big it would be. He estimated it would cost \$120 to \$200 a square foot to construct. **Molgaard** said the city could enter into a public/private partnership with a developer to construct the building. The city could look into selling low-interest revenue bonds to borrow money for construction, **Molgaard** said. "The bonds would be

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

backed by the employers' sponsorships and the rent," he said. **Molgaard** envisions an apartment complex with 40 to 60 two-bedroom units. The city is also submitting an application for grants from the Bloomberg Foundation, founded by New York City Mayor Michael Bloomberg, to help cover the cost of the program. The Bloomberg Foundation will award a \$5 million grant and four \$1 million grants to cities that come up with innovative plans to address issues such as how to make government work better, how to solve a serious problem in a city or how to improve city life.

The grant application is due Sept. 14, and the recipients should be announced in January or February. The grant could be used to help cover the cost of constructing the apartment complex or operating the program, he said. However, the project may move ahead regardless of whether Charleston receives any of the grants. "I think we can make this work without the grant," he said.

Molgaard believes businesses have a vested interest in attracting young professionals to the city. "And the businesses would probably spend \$10,000 on recruiting employees anyway," he said. The employees would participate in a three-year program that would foster community activism and get them engaged in the process of making citizens' lives better.

For example, during the first year, the employees would participate in leadership classes like those offered by the Greater Kanawha Valley Foundation, he said. The employees also would participate in the city's community policing program. During the second year, the employees would study social issues such as poverty and drug abuse affecting the city, he said. During the third year, the employees would work on a project to better the lives of city residents, **Molgaard** said. "These people will be the next philanthropists," he said. "They'll be the people we go to for help in the future."

Greater Kanawha Valley Foundation Chairman Ron Potesta believes the program could be very beneficial. "I think this is very exciting," he said. "I think something like this could work." Potesta told **Molgaard** he would approach the board to ask them to work with the city to get the program implemented.

Mayor Danny Jones is also excited about the project. "As a city we need to gear our thinking around young people," he said. "I hope this helps bring young people to the valley."

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

Charleston Gazette (WV)
April 26, 2013

OUTDOOR DINING City offers fence, for fee - Under proposed bill, city would maintain fencing on sidewalks \$%

Author/Byline: Travis Crum

Under a proposed planning bill, the city of Charleston would buy and maintain fencing for restaurants that want to offer outdoor dining to customers. Members of Charleston City Council's planning committee met Thursday night to tweak the regulations they passed a year ago that govern outdoor dining in the city's central business district. So far, only two restaurants along Capitol Street offer fenced-in outdoor dining - Bar 101/Ichiban and Adelphia Sports Bar & Grille. There would be more if the cost of installing the fencing weren't so high. So City Planner **David Molgaard** came up with a compromise. The city agrees to purchase, install and maintain fencing for restaurants if the restaurant owners agree to pay an annual \$500 administrative fee. "We don't want to discourage people because of the cost, but we want to make sure they have some skin in the game," **Molgaard** said. Restaurants that want outdoor dining, but no fencing, would only pay \$50 a year. The city's goal is not to recoup costs with the \$500 fee but to ensure that the restaurants make use of their outdoor dining areas, **Molgaard** said. The city would ensure that the fencing is uniform throughout downtown and creates a standard, signature look. Councilman Courtney Persinger said he's currently looking at different fencing and would have some options to choose from before the bill goes before the Finance Committee. It would cost about \$4,000 to \$5,000 per fence, but that does not include the cost of labor or regular maintenance. "We can cover these costs in our budget," **Molgaard** said. Also in the proposed bill is a requirement to widen the minimum 36-inch-wide free sidewalk area between the fence and curb to 42 inches. The Americans with Disabilities Act requires at least 36 inches for wheelchair accessibility. The proposed bill also adds language that bans smoking in outdoor dining areas, as required by the Kanawha-Charleston Health Department's clean indoor-air regulation. "This creates a very bright line prohibiting smoking in these areas," **Molgaard** said.

During the meeting, Deno Stanley, owner of Adelphia, and Scott Miller, owner of Bar 101/Ichiban, spoke in its favor. They both plan on keeping their outdoor dining areas for years to come. However, Miller asked why he had to pay the \$500 required administrative fee when he already invested more than \$2,000 to put his own fencing up last year. "That's \$2,000 worth of fencing that I won't be able to use," he said. Councilman Andy Richardson agreed, saying it wouldn't be fair to charge Stanley and Miller fees for 2013 since they were the city's test subjects. "If it weren't for these two men then there would be no outdoor dining in Charleston," he said. **Molgaard** also agreed and drafted an amendment to waive the \$500 administrative fee for any restaurant offering outdoor dining in 2012, which would cover both Bar 101/Ichiban and Adelphia. Stanley later asked about his liability if a customer were to be injured on the sidewalk or near the fencing. The city would only accept liability for issues that arise when it comes to installing or maintaining the fencing, **Molgaard** said. The proposed bill will be presented to council's finance committee for final approval before it's put up to a vote before city council next month.

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

Charleston Gazette (WV)
March 14, 2012

City-county tax snafu came with little notice After - discovery of decimal error, officials figuring amount owed

Author/Byline: Jim Balow

Charleston leaders learned they had to repay \$1.5 million in property taxes to the county just hours before members of City Council's Finance Committee voted on the 2012-13 budget Monday evening, City Manager **David Molgaard** said. But the total amount due back to the county may be less than originally thought because the county has been underpaying Charleston for excess levy taxes collected since July 1, 2011, said Allen Bleigh, Kanawha County chief tax deputy. Bleigh said he and an assistant spent much of Tuesday recalculating how much the city should have been paid each month from tax collections in the Charleston North tax district. The area includes North Charleston and a swath across the northern edge of the city to Wertz Avenue.

Although city Finance Director Joe Estep had alerted them about higher than expected tax payments since last fall, county tax officials were not even sure there was a problem until Monday, Bleigh said. "We had serious discussions Thursday with Mr. **Molgaard** and Mr. Estep," Bleigh said. "They were working on the budget and said they had concerns about property taxes. "I didn't think there was much to it until [Monday] morning. I saw what looked to be a typo, a formula error within the spreadsheet. "When I realized that wasn't it, that it was a more serious problem, that's when I looked into it further." Bleigh determined there was an error in the Charleston North district. "I had a second meeting ... and said yes, I can confirm there is a problem, but I can't confirm where it is." That was around 1:30 p.m. Monday.

Molgaard and Estep, meanwhile, had been making contingency plans with a final Finance Committee budget meeting looming Monday evening. By Friday, Estep knew there was a problem with the property taxes and projections for the 2012-13 budget, **Molgaard** said. Monthly property tax payments from the county had been consistently running about 25 percent higher than a year ago, which didn't make sense, Estep said.

"Joe and I got together Sunday afternoon to fully evaluate the situation and map out a plan," **Molgaard** said. "We also brought in Steve Duffield from the [county] assessor's office. We went back and forth on what [the problem] could be. All the numbers seemed to reconcile, and yet it seemed clear there was a problem. "I put off a revision to our budget until I met with Allen, [but] Joe and I had put a plan in place." After the afternoon meeting, he emailed the budget revision to council members.

Back in his courthouse office, Bleigh called Software Systems, the county's tax software vendor. Together they pinpointed the source of the problem - "the dreaded decimal point." A tax clerk had entered a decimal point incorrectly for calculating the city's share of property taxes from Charleston North, giving the city 10 times the proper amount, Bleigh said. He notified **Molgaard**

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David Molgaard
(Articles are in reverse chronological order)

and Estep. "It was like 4, 4:30 [p.m.]. I went over and told them face to face." He stayed for the 5:30 finance meeting and explained the mistake to council members.

Now he's trying to figure out the right numbers. "I have to go back and recalculate all the tax distributions there have been this year, one a month - eight, from July to February," Bleigh said. "The rate was corrected yesterday. But where there was an overpayment on the Charleston current [property tax], there was an underpayment on Charleston excess [levy]. It's not going to totally compensate. I don't know if it's going to be \$10,000 or \$100,000."

Bleigh said he plans to let an accountant check the new figures before he sends them to the city for repayment. "I'm 99 percent sure they're correct." For one month alone - February - Charleston should have been paid \$2,269,907 instead of \$2,793,308, he said. That's an overpayment of \$523,401, or 23 percent.

Molgaard said he's not worried about repayment. "We're content in letting [Bleigh] go through the numbers and do the reconciliation. We'll have discussions at that point and on how this will be repaid. We may forgo some remittance. I have no doubt we'll work very well together. I don't expect they'll say, 'Pay us tomorrow.' "I have not sat down with our people to understand the cash flow situation," **Molgaard** said. "Our [current] budget wasn't affected by this, so it should not be a problem paying it back."

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

Charleston Daily Mail (WV)
January 13, 2012

Special city tax district approved Consent will allow - Charleston to cover \$31 million Civic Center revamp \$%

Author/Byline: Paul Fallon

The West Virginia Office of Economic Development on Thursday approved Charleston's application to create a tax increment financing district in the downtown area. The approval will allow the city to finance millions of dollars worth of Civic Center renovations. "We're really pleased about this," Mayor Danny Jones said. The city wants to spend nearly \$31 million on the aging Civic Center, City Manager **David Molgaard** said. The special tax district is projected to generate enough revenue over 30 years to repay \$20 million borrowed via a bond sale, he said.

A tax increment financing district, also called a TIF district, is a specially designated area for which the property tax revenue that results from increases in assessments is diverted from the typical recipients to a specific project. Property tax revenue for this district was frozen as of July 1, 2011. All revenue from higher assessments of property in the district after that date will go toward paying off bonds for the project, **Molgaard** said. Taxes on property in the area will not increase because of the creation of the district, he said. Charleston Council members unanimously voted to apply for permission to create the district during a Dec. 19 meeting. The city sent the application to the state office on Dec. 22, **Molgaard** said. The West Virginia Economic Development Office had 60 days to approve or deny the request, he said. Jones said the speed at which it was approved is a testament to the project itself. "I think the state government wants to see the capital city have a good Civic Center as much as we want to have one," Jones said.

Molgaard was also pleased the application was approved. "It makes sense on many different levels for them to approve this," he said. Renovating the Civic Center has been a goal for some time, he said. "This is the first hurdle. Our efforts will now turn toward the design of the project and obtaining the additional funds needed for the project."

Bonds will be issued in two phases, **Molgaard** said. The first bond issue is anticipated to be \$7.9 million, he said. The second phase will be for about \$12 million and will come at a later date. The city will have to come up with an additional \$11 million or adjust the scope of the project, **Molgaard** said. City leaders are looking at revenue streams including lottery revenue distributed to all cities to pay off the bonds not covered by the district. Hotel/motel tax revenue also could be used to help fund the project January 13, 2012 said.

Preliminary estimates run from \$16.2 million to \$28.3 million, depending on the type of renovations. Another \$2 million in contingency funds also is needed. The TIF district is now official, and the city will start setting aside money generated from any improvements, **Molgaard** said. The city will not be able to begin issuing bonds for the project until revenue has accumulated, he said. "Obviously, we're going to have some lag time before we can start issuing

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

bonds," he said. A total of 89 parcels of land will lie in the district, according to the city's application. The rectangular district would run along Kanawha Boulevard from Capitol Street to the Elk River; along the Elk to Washington Street East; east on Washington to Court Street; south on Court to Virginia Street; and east on Virginia to Capitol Street.

Molgaard said city leaders wanted to incorporate only properties that would directly benefit from Civic Center renovations, such as hotels and restaurants. "It's limited to the area that we might think of as our visitors and convention district," **Molgaard** said. City leaders expect a lot of action in this district in the coming years, **Molgaard** said. There are improvements planned for several buildings, and construction of a new hotel is slated for one of the parcels inside the district.

Improvements to the Chase Tower, the downtown Marriott, the Ramada Inn Charleston on Kanawha Boulevard and the Charleston Town Center mall will help fund the renovations. A Marriott Courtyard Hotel, an office building and a parking garage are to be constructed at the confluence of the Elk and Kanawha rivers.

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David Molgaard
(Articles are in reverse chronological order)

Charleston Daily Mail (WV)
August 23, 2011

FIRE DEPARTMENT Holiday pay plan snuffed Retiring - Charleston firefighters were paid \$%in advance for holidays that - hadn't yet occurred \$%

Author/Byline: Paul Fallon

To save money and reduce the city's pension liability, Charleston officials have ended the practice of paying retiring firefighters for holidays they have not yet worked.

Last January, City Manager **David Molgaard** discovered something that seemed amiss about the lump-sum payments that in previous years had been made to firefighters upon retirement. The final checks had included pay for holidays for the remainder of the calendar year in which they were retiring even though they had not yet worked those days. "Apparently this has been going on for years," he said.

Like all other city employees, firefighters are deemed to have earned vacation time for the full year on Jan. 1. If they leave before the year is out, they are paid for that time. All firefighters receive extra compensation for working holidays - 108 hours in a non-election year and 132 in election years. This is because fire stations must be manned 24 hours a day, 365 days a year, including holidays. Firefighters, like other public employees, get 12 holidays in a non-election year. They also get holidays for election days, which are determined by what days the elections fall on, Finance Director Joe Estep said. Firefighters must schedule their vacation time, along with the days they are taking off for holidays, at the beginning of the year, **Molgaard** said.

In previous years, those who waited until the beginning of the year to retire - and many apparently have - would turn in not only their unused vacation time, but also the upcoming holiday hours, for a lump sum payment. The city would have had to pay a total of \$12,489 to the five firefighters for the unused holiday compensation time, City Finance Director Joe Estep said. "We just finished Christmas 2010, and we were two weeks into January, and they were wanting us to pay them for Christmas 2011," **Molgaard** said. "These certainly weren't earned holidays because the holidays hadn't occurred yet." The pay for holidays not worked not only increased the size of the lump-sum payment, but also boosted firefighters' pension payments during a time when the city is struggling with millions of dollars of unfunded liability in the police and fire pension plans, he said.

One of the factors in the formula used to calculate pensions is firefighters' total pay, not just their base salaries. **Molgaard** said payment for unworked holidays for the lowest paid firefighters retiring at the beginning of 2011 would have increased their pension payments by \$40 or \$50 a month. "That equals a pretty significant amount of money for the city to pay over time," he said.

Mayor Danny Jones said the payments never should have been allowed. "You should only get paid for holiday leave for days that you actually work," he said. City officials noticed the practice at the beginning of 2011 when five retiring firefighters turned in their paperwork

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David Molgaard
(Articles are in reverse chronological order)

claiming the upcoming holidays for payment. One of the five was Timothy McKown, 50, of Jackson County, a paramedic/firefighter for Charleston for 21 years. McKown believes the retiring firefighters were wronged when they were denied payment for the upcoming holidays. He filled out his retirement paperwork claiming payment for vacation time and holiday time and submitted it to city hall before his final shift on Jan. 2. Two weeks later, he discovered he would be paid for the unused vacation time but not the upcoming holidays. McKown said he was upset because firefighters who had retired in past years were compensated for both. "I was upset because the city decided to deny it two weeks after I retired," he said.

Fire Chief Chuck Overstreet said he sees both sides. He understands the city is struggling to keep up with pension payments and the over \$99.1 million unfunded liability in the firefighter pension plan. But he also understands the firefighters' frustration because those who retired in the past had been paid for the upcoming holidays. Overstreet said the city could have told firefighters that payments for upcoming holidays would cease after the 2011 group had retired. "I just question the timing of it," he said. The mayor's response was to say, "It never should have been paid for all those years. It's completely inappropriate and they're not entitled to it."

Overstreet said the city's decision has caused some animosity. "Some of the guys had a frictional type of relationship with the city," Overstreet said. "They took it personally." The issue went before the Charleston Civil Service Board last spring, and the firefighters' grievance was thrown out. McKown said he would not be pursuing the issue any further.

However, City Attorney Paul Ellis said his office was contacted by local attorney Marvin Masters on behalf of the retirees a couple of months ago. Ellis said the recently retired firefighters have taken no legal action so far. A secretary for Masters conferred with the attorney and said he was not involved in the case.

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David Molgaard
(Articles are in reverse chronological order)

Charleston Gazette (WV)
July 20, 2011

Charleston receives \$50,000 NEA grant

Author: Unknown

The City of Charleston announced on July 12 it will receive an Our Town grant from the National Endowment for the Arts, one of only 51 grants awarded nationwide. Charleston will obtain \$50,000 to create public art policies, guidelines and promotional programs. Our Town is the NEA's latest investment in "creative placemaking," through which partners from both public and private sectors come together to strategically shape the social, physical and economic character of a neighborhood, town, city or region around arts and cultural activities.

The Charleston Public Art Project will entail four key outcomes including development of policies and guidelines for public art, a complete inventory of current public art including any short-term and long-term maintenance needs, outreach and promotions to market public art and establishing a local government arts development initiative to oversee implementation of policies and guidelines, future public art projects and encourage new public art installations.

"Communities across our country are using smart design and leveraging the arts to enhance quality of life and promote their distinctive identities," said NEA Chairman Rocco Landeman. "In this time of great economic upheaval, Our Town provides communities an opportunity to reignite their economies."

"Over the past decade, Charleston has taken several important steps to create a more vibrant community for the arts and culture with the creation of FestivALL, monthly Art Walks, opening of the Clay Center, investments in several public art projects and greater promotion of art and artists in our city," said Charleston Mayor Danny Jones. "This grant — and the \$100,000 partnership it creates — will help us get a deeper understanding of our current inventory of art and chart a course to build on our recent successes." The competitive grant application process was led by City Manager **David Molgaard**, City Purchasing Manager Shannon Milroy and Susie Salisbury, vice president of community development for the Charleston Area Alliance. Matching funds and in-kind resources have been provided by Charleston Urban Renewal Authority, City of Charleston, Charleston Area Alliance and Clay Center for the Arts and Sciences West Virginia.

"Art is an essential element in creating a thriving community and can play a significant role in economic development," said Alliance President/CEO Matt Ballard. "We congratulate all who contributed to securing this major grant, which will advance the city's strong commitment to the arts and strengthen it as an attractive and inviting place in which to live, work and play. It's a win-win for the arts community, citizens and business alike."

"Public art not only makes a statement about the community, it enriches the lives of those within it. This grant from NEA will provide needed funds to promote our public art to our community and visitors. It will also serve as a catalyst to protect these wonderful community assets and to

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David Molgaard
(Articles are in reverse chronological order)

encourage installation of others,” said Judy Wellington, president and CEO, Clay Center for the Arts and Sciences West Virginia.

“Everyone who has contributed or hopes to contribute to public art in Charleston is excited about this National Endowment for the Arts grant which will help to preserve and publicize our public art works. FestivALL joins many other organizations in thanking the NEA and congratulating Susie Salisbury and the Charleston Area Alliance for obtaining it,” said Larry Groce, executive director of FestivALL Charleston.

“As the capital city of West Virginia, it is our responsibility to showcase and preserve the cultural hub of the state by establishing public art guidelines and sustainable maintenance plans. By setting this example, perhaps we can inspire other cities and communities to develop their own guidelines,” added Naomi Bays, chair of the Arts Council of Kanawha Valley.

The National Endowment for the Arts was established by Congress in 1965 as an independent agency of the federal government. To date, the NEA has awarded more than \$4 billion to support artistic excellence, creativity and innovation for the benefit of individuals and communities. The NEA extends its work through partnerships with state arts agencies, local leaders, other federal agencies, and the philanthropic sector.

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David Molgaard
(Articles are in reverse chronological order)

Charleston Daily Mail (WV)
July 5, 2011

New Council to tackle pension funding Elected members - agree solving pension problem is biggest challenge city faces \$%

Author/Byline: Paul Fallon

Just a few weeks ago, eight new members were sworn into their seats on Charleston's City Council. Already they agree that figuring out how to fund firefighter and police pension plans is the biggest challenge facing the city they've been elected to serve. Because Charleston has millions of dollars in unfunded liability for both plans, officials recently opted to close the old plans to new hires, offering them a new plan instead. But to move forward with that new pension plan, the city must come up with \$1.7 million on top of the \$6.2 million it already allocated. "That's the 800-pound gorilla in the room," newly elected councilman Andy Richardson said. "This is a very serious issue for Charleston and public entities throughout West Virginia."

Richardson, a Democrat who won one of six at-large council seats, believes that although the situation is dire, the city will address the unfunded liabilities and move forward. "Dealing with the pension problem is our first and biggest issue, and I want us to focus on that right now," he said. Republican Chris Dodrill, who also has an at-large seat, agreed, and believes the pension liability must be dealt with in the next four years or all other issues will become moot. "We have to deal with this right off the bat," Dodrill said.

In recent talks with other council members, Mike Nichols, a Democrat elected to represent the 5th Ward on the city's West Side, found "everyone seems to say that the pension issues are the major concern," he said. Though Nichols wasn't sure where the city would come up with the money to fund the new pension plans but said he would be looking closely at the issue in the weeks, months and years to come. Republican Mike Stajduhar, the councilman representing the city's 7th Ward on Charleston's West Side, said, "We have to meet our obligations to the pension plans for the uniformed services."

One new member, Republican Courtney Persinger, who represents the city's 15th Ward in the South Hills community, thinks Mayor Danny Jones and City Manager **David Molgaard** have done a good job addressing the situation. "But this is a big chunk of money the city has to come up with," he said.

Fellow Republican Brent Burton, the council representative for the 20th Ward in South Hills, believes the city will have to find a way to cut expenses to address the unfunded liabilities. "We need to look at ways to be efficient to come up with that money," he said. "Hopefully I'll have a better understanding of these things within a few months." In addition to wanting to resolve the city's pension issues, Democrat Sam Minardi, the councilman who represents the 16th Ward in South Hills, would like to see more police patrols in the South Hills area to combat what he called an increasing number of vandalism and burglaries. Burton, meanwhile, would like to see a

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David Molgaard
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standing Saturday event established in the downtown area - possibly on one closed-off block of Capitol Street - as a compliment to the Friday night Live on the Levee series.

Another issue facing the 20th Ward is the possible consolidation of the Oakwood and Bridge Road fire stations. Burton said the Oakwood station has severe structural issues. "Something has to be done," he said. "But if we consolidate the two stations, the new one has to be at a point where it can serve all the residents in the wards that are affected." An election challenge filed by defeated Democratic mayoral candidate Janet "J.T" Thompson is another matter requiring the attention of council, Persinger said, though he stopped short of offering his opinion on the merits of the case. Council has to address the matter as the adjudicating body on July 21. "We're wanting to get through that in as fair a manner as we can," he said.

Thompson challenged the May 17 city election, making numerous allegations including voter fraud. Street maintenance is a major issue facing the 7th Ward, as is storm water drainage, Stajduhar said. Meanwhile, Nichols will concentrate on crime on the West Side. He believes more bike and foot patrols are needed. Richardson wants to concentrate on attracting businesses and new residents into the city, and Dodrill would like to see a new art museum established downtown.

Just as their priorities vary, the newly elected council members range in age, political experience and career paths. Richardson, 53, is the only one who has previously served on a governing body. He sat on the South Charleston City Council from 1987 to 1989 before resigning to become a part of former Gov. Gaston Caperton's cabinet. This is the first time Dodrill, 33, has ever held public office. The graduate of the U.S. Naval Academy is a lawyer by trade who grew up in San Diego, Calif. He moved to Charleston because his wife is from the area. The couple met while attending a Navy/WVU football game. Nichols, 49, is retired from the U.S. Postal Service. While working, he injured his back when a hydraulic chair gave way under him. He now collects a small disability check along with his pension. Stajduhar, 61, ran for council twice before being elected on May 17. He was defeated for the 7th Ward seat in the 1995 general election by Democrat Clyde Ransom. He barely missed the sixth at-large council spot during the general election in 2007. He is a lawyer by training and a banker by profession. He has worked at BB&T Bank on Summers Street for more than three decades.

Another one of the young guns elected to city council during the last election is Persinger, 32, who received his bachelor's degree in political science from Hampden-Sydney College in Virginia and his master's degree in liberal arts from St. John's College in Santa Fe, N.M. Burton, 32, is a graduate of West Virginia University's School of Business who has worked at Commercial Insurance Services in Charleston since 2001. This is Minardi's first time serving in public office, although the 39-year-old Clarksburg native has experience in politics. He owns his own lobbying firm. Democrat Bobby Haas, the councilman from the 1st Ward in North Charleston, could not be reached for comment.

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David Molgaard
(Articles are in reverse chronological order)

Charleston Gazette (WV)
June 7, 2011

POLICE, FIRE City predicts \$21M pension cost by 2031

Author/Byline: Jim Balow

Yearly pension costs for city police and firefighters could reach \$21 million by 2031, Charleston City Manager **David Molgaard** said Monday. Unfortunately, that's the good news. If the city hadn't adopted a new "conservation methodology" for newly hired police and firefighters earlier this year, those pension costs would have risen to more than \$30 million a year under the old "alternative plan," **Molgaard** told members of City Council's Finance Committee.

Molgaard unveiled new 20-year projections of city finances Monday, and gave newly elected council members a crash course in the complicated problems the city faces in trying to pay off the under-funded pension plans for its uniformed employees. Finance Director Joe Estep estimated trends in property taxes and revenues for the next 20 years, **Molgaard** said. "We see anticipated revenues in 2021 of \$104 million and in 2031, \$142 million." The current budget is just over \$80 million.

This year, salaries, pensions and other costs for the police and fire departments make up more than 43 percent of the total city budget, he said. But in 20 years, because of the rising pension costs, those two departments will represent almost 53 percent of the total budget. "Growth in the fire department will consume what we spend on parks and recreation," **Molgaard** said. "I'm not saying we'll do that, but we'll have to do something." A consultant's study of fire department efficiencies should be ready in two weeks, he said.

But according to preliminary results, "we might be spending twice as much as any comparably-sized city east of the Mississippi River per capita" on fire protection, **Molgaard** said. "It looks like we may have the ability to look for ways to save money. Somehow other communities are finding other ways of dealing with the challenge."

Councilman Harry Deitzler said each retiree gets more than \$40,000 a year through his or her pension. "If they live 20 years, that's \$1 million. Every man on the truck, that's a million-dollar liability."

Mayor Danny Jones said fixing the pensions will be council's challenge for the next four years. "It's tough. There will be voices out there. They don't want to change. So what's your plan? Anyone can say they don't like something."

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

Charleston Daily Mail (WV)
March 18, 2011

Charleston City Council passes \$81.95 million budget - Jones says he is happy legislation provides another way to cover - unfunded liabilities

Author/Byline: Paul Fallon

Charleston City Council passed an \$81.95 million budget by a unanimous vote during a short special meeting Thursday. The upcoming fiscal year's budget represented many challenges and was one of the hardest he has undertaken, said Mayor Danny Jones. "I'm proud we balanced our budget."

Jones also said he was very happy that a bill giving cities an alternate way to fund firefighter and police pensions passed the Legislature during the recent session. This passage opens the door for the city to hire three new police officers to fill vacancies, he said. "It's a process to hire new officers," Jones said. "But hopefully we'll be able to do this in a month." The three new officers would bring the force to 176. A temporary freeze on the hiring of new officers was put in place by Jones last March due to the massive unfunded liability in the city's police and firefighter pension funds. Jones said the bill eventually would allow the city to cover about \$200 million in pension liabilities. "But it's going to be a long, slow, expensive road," he said. "But it will save the city from bankruptcy."

The city will not begin hiring new firefighters until a study of fire station deployment is completed, City Manager **Dave Molgaard** said. "We're waiting until we get that study back before we talk about hiring any new firefighters," he said. One of the issues to be studied is what to do with the outdated Oakwood Road fire station. It has structural problems, **Molgaard** said. One solution would be to consolidate the Oakwood station with the Bridge Road fire station, he said. The report should be returned to city council around the end of April, he said.

For a second consecutive year, the upcoming fiscal year budget does not include any across-the-board raises for city employees. The budget grew by about \$1.5 million over the current fiscal year. It includes a \$100,000 cut in funding to the Kanawha-Charleston Health Department, bringing the city's total contribution to \$100,000. The city expects an increase of about \$180,000 in property tax revenue next year. Business and occupation tax revenue is expected to rise by about \$792,000.

The increased revenue will cover rising costs, such as retirement benefits, **Molgaard** said.

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David Molgaard
(Articles are in reverse chronological order)

Charleston Daily Mail (WV)
January 19, 2011

Majority of landlords owe city money Payments on - either fire, refuse or taxes on at least 2,300 units are late \$%

Author/Byline: Billy Wolfe

A majority of landlords in Charleston's new registration system are late in payments to the city for services like fire protection, garbage collection or business and occupation taxes. City Finance Director Joe Estep told members of the Finance Committee Tuesday that about 830 different property owners have registered properties with the city since the law took effect Oct. 4. More than 4,100 individual residential rental units have been registered so far, Estep told committee members. But payments on either fire, refuse or taxes on at least 2,300 units are late, Estep said. In some cases, landlords have neglected to pay all three for several years. Some of the landlords owe very little and most likely are unaware that they need to settle up with the city, he said. During a demonstration of the new electronic database software, Estep showed committee members the account of one landlord who owes the city just \$1.95. He said that is why the registration ordinance states that the city collector "may" revoke a landlord's license for failure to pay city fees. "In this case, there is a much more humane solution than to revoke," he said. But in other cases, like one landlord who owes the city more than \$1,300 in refuse fees and \$66 in fire fees, Estep said the city should take a harder line. While \$66 might not sound like much, Estep said that fire service fees typically only amount to about \$20 per year. That means the landlord hasn't paid the city anything for fire protection in three to four years, he said. Landlords who owe large amounts of money will be sent notices that their license will be suspended if they don't pay up. A simple reminder will be sent to those landlords who owe more paltry sums. Estep said landlords continue to register properties with the city. About 100 units went into the system Tuesday.

City leaders also received a report at Tuesday's meeting on the annual audit conducted by the state Auditor's office. The city was given a mostly clean report, with just two exceptions, said Audit Manager John Jones. The city was out of compliance last fiscal year regarding its policies on clothing allowances for public safety workers and allowing Clay Center officials to "make checks payable to cash" in order to pay event promoters, Jones said.

Public safety employees were not being told to show receipts for clothing allowances. They also were not being required to list the clothing as "taxable income" on their annual W-2 statements, Jones said. City Manager **David Molgaard** said that the problem has been corrected. Employees will now be required to list uniforms as taxable income with the IRS, he said. Discrepancies with check payments at the Clay Center also have been resolved, Jones said. Jones and other officials with the auditor's office who attended the meeting declined further comment to news media after their presentation.

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

Charleston Gazette (WV)
November 16, 2010

City health-care situation better, manager reports - Retirement liability costs a 'monster' to be 'mastered'

Author/Byline: Jim Balow

At a time when almost everyone is paying more for health care, Charleston's health-care costs have gone down, City Manager **David Molgaard** said Monday. As a result, the city could meet some of its unfunded retiree health obligations that seemed out of reach a year ago, **Molgaard** told City Council members.

"It may be this OPEB [other post-employment benefits] monster can be mastered," **Molgaard** said. "I think we can fully fund our liability for the last two years. We're getting there." City officials cited the OPEB liability - \$130 million in unfunded future health-care costs for current and future retirees - last spring as one of the main reasons they couldn't give employees an across-the-board pay raise as usual this year.

The city budgeted about \$4.5 million last year for current health-care costs. But under new accounting rules, it was supposed to set aside another \$5.2 million for future OPEB costs. "We presented new data to our actuaries, and they recalculated," **Molgaard** said. The obligation was much less - about \$2 million this year, \$3 million next year, he said. At the same time, through a series of wellness measures, the city has been able to slow the normal inflation in costs, he said. Instead of the 11 percent increase predicted each year by a consultant, the city's health costs rose just 4 percent in 2009. So far this year, the costs are down 10 percent, **Molgaard** said.

Those savings were reflected in a series of budget revisions council members approved Monday to close out the books on the 2009-10 city budget. "This is the year-end stuff we do about this time each year," **Molgaard** said.

Council transferred \$2 million in budgeted but unspent health-care funds, and another \$2.34 million of other unspent money from the general budget, into the city's health-care reserve - a total of \$4.34 million. Another \$200,000 was set aside to help a draft a new comprehensive plan for the city's Planning Department. The current plan is about 15 years old.

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

Charleston Daily Mail (WV)
September 9, 2010

City wins design grant EPA award pays for - consultants to give Slack Plaza a makeover
Author/Byline: Rivard

The U.S. Environmental Protection Agency will pay for a team of consultants to redesign Slack Plaza, the city of Charleston's maligned transit mall. The EPA announced Charleston as one of five state capitals that are meant to benefit from the agency's "Greening America's Capitals" program. The federal agency will pay for a team to come up with a plan for the plaza. It will not provide the city with money to turn blueprints into reality, something that could end up costing hundreds of thousands of dollars.

In announcing Slack Plaza as its choice, the EPA said, "The city itself acknowledges that the area lacks any green space, has no real sense of place and is challenged by poor signage and safety issues." The other sites are in Boston; Jefferson City, Mo.; Hartford, Conn.; and Little Rock, Ark. Thirty-eight of the 50 states applied.

Slack Plaza is the site of a bus station that serves thousands of riders a month and is the main crossroads for downtown foot traffic. But it's also "barren, hot and unattractive," according to an application submitted to the EPA by Charleston City Manager **David Molgaard** and Susie Salisbury, the vice president of the Charleston Area Alliance. They said the transit mall is a stop for more than 640 bus trips a day but the riders, many of them low-income and without a car, have said they don't like the plaza because of its design, poor security and blight. "In addition, a lack of green space has resulted in an area this is barren, hot and unattractive. Citizens and visitors have expressed concern with the targeted area, and the statistics show that in the past two years, over 1,000 calls to Metro Emergency 911 have been logged in the immediate area we are proposing to redesign," the application said.

The EPA said one goal in Charleston is to "establish a common vision for Slack Plaza that could transform it into a multi-modal transportation hub and well-used town square. Adding public art, trees, and redesigning the pedestrian corridors to serve a range of users will continue Charleston's efforts to foster a more beautiful and sustainable community." The agency's help doesn't come with any money outside the fees to be paid to the consultants, who have yet to be hired. Design consultants can be costly.

Molgaard said in an interview Wednesday that the master plan for the city's riverfront cost \$120,000. Once the city has the design provided by the EPA-hired consultants, it would have to find the money to do the work. That could cost \$1 million or more, **Molgaard** said. The city would likely seek grant money and donations.

Molgaard suggest problems at the plaza have been endemic since it was constructed more than 20 years ago. He said the original design was "somewhat deficient." "Certainly it's tired looking after the last 20 or 25 years," he said. "But even the design itself constituted a gauntlet that

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David Molgaard
(Articles are in reverse chronological order)

required people who were using it as a thoroughway to pass other users who were sitting and whiling away the time but would oftentimes cause problems for those who wanted to get from one end of the walkway to the other."

Some of the nicer touches in the original design are useless today. Some of the trees that were planted were cut down when they matured and became a safety hazard. A fountain in the plaza's center would get clogged with trash and people would bathe in it. It's been turned off. There have been several attempts to fix the plaza's problems, though they have been occasionally beset by controversy. A few years ago, for instance, the city installed "loafer rails" - otherwise known as spikes - on low walls where people had been sitting. The goal was to prevent loitering.

Last year, **Molgaard** said he applied for an \$800,000 grant to pay for a redesign that was drawn up in-house, but the city didn't get the grant. He said having the comprehensive plan drawn up with the EPA's help could help the city attract money.

City officials will meet with the EPA to talk about the project in coming weeks. After that, there will be some type of bidding process to hire the consultants, he said. That process may favor bringing in out-of-state consultants. "I don't think there's an intention to favor local versus outsiders, but the goal is to hire people who have significant experience with urban design and the goals of providing sustainable, green, innovative benefits," **Molgaard** said.

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

Charleston Daily Mail (WV)
March 5, 2010

Committee submits city budget tight on new spending

Author/Byline: Billy Wolfe

Charleston's proposed budget for the upcoming fiscal year contains just \$123,000 in new spending. City Finance Director Joe Estep told members of the city's finance committee Thursday that this is one of the smallest growths in spending he's seen. From 1999 to 2008, the city saw a 25 percent increase in spending. The budget increased by about 5.8 percent last year alone.

The \$80.4 million budget presented to committee members contains no raises for city employees for the first time since Mayor Danny Jones took office in 2003. Last year, an across-the-board 3 percent pay increase cost the city about \$1.1 million, city manager **Dave Molgaard** said. Officials plan to eliminate one cashier position in the city collector's office, thanks to what **Molgaard** called "increased efficiency." Four lieutenant positions in the fire department also will be converted to lower paid firefighter positions, **Molgaard** said. He expects those cutbacks, as well as other position changes, to save the city more than \$40,000 next year. He said no employees are being laid off, but that the cutbacks will be implemented as employees leave their jobs.

Jones also has proposed consolidating the fire stations on Oakwood and Bridge roads. The consolidation is not yet reflected in the proposed budget, **Molgaard** said. "My understanding is that the mayor intends to form a committee to study the best location for the new station," **Molgaard** said. "It's still too early to budget for that."

Another big cut to spending came Wednesday morning, when the state Consolidated Public Retirement Board reconsidered an earlier decision to increase public sector employer pension contributions by 6 percent of an agency's total payroll. That decision would have increased the city's contribution by more than \$950,000, officials estimated. The board reconsidered that decision, following an outcry from elected officials across the state. The board voted Wednesday to set the increase at 1.5 percent, meaning Charleston will instead contribute about \$239,000 more to pensions — a savings of about \$717,000.

Jones also wants to put a temporary hiring freeze on the police and fire departments, and wants the savings from those cutbacks set aside in a pension stabilization fund. The city is currently underfunding police and firefighter pensions by about \$129 million, and that figure is expected to climb to \$185 million over the next 20 years.

The only budgeted increase to city staff will be three property maintenance inspectors, two of which will be brought on board to enforce the yet-to-be-passed controversial landlord ordinance. Vehicles and laptop computers will be purchased for the new inspectors as well, **Molgaard** said. The combined estimated cost for the new inspectors' salaries and the new equipment will be

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David Molgaard
(Articles are in reverse chronological order)

about \$214,000. An additional \$20,000 has been budgeted for property demolitions in the city, **Molgaard** told finance committee members.

In addition, Estep said he budgeted for a 4 percent increase to employee health care costs, but said the city is poised to come in \$1.8 million under budget for the current year. **Molgaard** said he is working to implement significant changes in employee health care plans. Right now, employee premiums are tied to income, and **Molgaard** said that system creates some unfairness. Under the current plan, an employee who makes less than \$30,000 a year can insure a whole family for less than a single employee who makes \$40,000 a year, **Molgaard** has said. “In essence, our single employees are subsidizing our employees who have children,” he said. His ultimate goal is to formulate a plan where the city would subsidize about 60 percent of all city workers' health plans. Non-tobacco users would receive an additional 15 percent discount under that plan, he said. **Molgaard** also is working to change the city's policies so that unused sick leave can no longer be converted to premium health care coverage, he said.

Surprisingly, officials say they expect revenues to climb by about \$2.2 million in the upcoming fiscal year. Estep has budgeted for a \$2.2 million increase in revenues, and he said the vast majority of the new money will come in the form of property taxes. Estep said he budgeted for about \$9.1 million in property tax collections for the current fiscal year, but that collections have already topped \$9.9 million.

The city also has paid off the debt incurred on its 1989 general obligation bond. Estep said that means an additional \$1.4 million that was normally used to pay off the debt will now go into the city's general fund.

The city also has budgeted for about \$500,000 less in business and occupation tax collections, but Estep said that figure might be too extreme. He said the tax collections have been showing improvement in the last six months.

The whole of council will hold a special meeting at 6 p.m. March 18 to vote on the budget.

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David Molgaard
(Articles are in reverse chronological order)

Charleston Daily Mail (WV)
June 29, 2009

City still allows employees to trade sick days Charleston has an unfunded health insurance liability of \$129.7 million

Author/Byline: Cara Bailey

Eight years after state government stopped the practice for new hires, the city of Charleston continues to let employees trade unused sick days for health insurance premiums in retirement. And despite the fact that the city, like the state, has a hefty unfunded liability for health insurance promised to its retirees, City Manager **David Molgaard** says the city comes out ahead by using the incentive. "The city has not cut off conversion of sick days like the state has because the analysis of relative benefits versus costs suggest that the city continues to benefit from this arrangement," he said. A recent actuarial study shows the city has an unfunded liability of \$129.7 million for health insurance promised to its retirees.

Like the state, the city highly subsidizes health insurance for all its retirees, not just those who trade in sick days. City employees with unused sick days, like state employees, also can opt to trade those days for service credit when they retire and, thus, inflate their pensions. Many public employees find they are ahead to trade their unused sick leave for higher pensions because the pension increase exceeds the cost of the health insurance premiums. State officials decided in 2001 not to let employees hired after that point trade in sick days for health insurance premiums in retirement.

In a study commissioned by former Gov. Bob Wise, nearly 67,000 people covered by the public retirement programs had built up 7.4 million sick days. If all those employees were to trade sick leave for insurance premiums upon retirement, it would cost the state between \$919 million and \$1.5 billion, the study said. The state eliminated the option for employees hired after July 1, 2001. The Governmental Accounting Standards Board now requires political subdivisions to reflect the amount of retirement liabilities in their financial reports. Both state and local governments are struggling to meet the new reporting requirements, which are forcing controversial decisions and even benefit cuts. However, **Molgaard** says the city comes out ahead by using the incentive to cut down on active employees' use of sick leave. Of the 374 retirees currently enrolled in the city's health care plan, only 62 are not paying premiums after trading in sick days, said Finance Director Joe Estep.

The city's cost for each employee varies according to when they were hired and whether they have dependents who need coverage. However, **Molgaard** said calculations of the value of sick days for those 62 employees added up to more than \$1.9 million while the total cost of their health insurance premiums was \$862,000. In his view, that gave the city a savings of \$1,038,000. "When we looked at those numbers in and of themselves, the city is coming out ahead in terms of value of services versus value of premiums," **Molgaard** said.

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David Molgaard
(Articles are in reverse chronological order)

The city grants 12 sick days a year to civilian employees. Firefighters and police officers receive a certain number of hours of sick leave each month based on the hours they worked. The unused sick days do not expire when the year ends, so employees who miss little work can build up significant numbers of days over time. Those who opt to trade their unused sick time for health insurance premiums can receive one month of coverage for every two days if they are single and one month for every three days if they need family coverage.

Molgaard said Charleston has maintained the sick-day conversion policy to encourage people not to take off unless they are actually ill. The ability to convert sick days after retirement is a bonus for the employees, and the city cuts down on the loss of productive work time. "The fact of the matter is - and maybe it's human nature - there are some people who feel sick days are an entitlement, and as soon as they get one, seem to take it," **Molgaard** said. "We encourage people to save their sick days so they don't take off, so the city doesn't lose that value."

Molgaard said the value of premiums being obtained through sick-day conversion is less than 6 percent of the cost of the city's yearly premiums. "We're not really giving up a lot in terms of dollars on a yearly basis as it relates to health care costs," he said.

Lisa Dooley, the executive director of the West Virginia Municipal League, said Charleston is not the only city that has declined to follow the state's lead on this issue. In an informal survey she conducted via e-mail recently, she found no other cities in the state that had made the change. However, she expects the issue to come up at the Municipal League conference in August. "We know that the day of reckoning is coming, even though the state is saying cities can book entries," Dooley said. "Once the state has to reckon with this liability, they'll pass the burden to the political subdivisions."

Molgaard said he does hope to address the issue when city officials look at the personnel code, which could receive some revamping. **Molgaard** said his goal is to have the overall health care plan, including liabilities, addressed before Jan. 1.

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David Molgaard
(Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **David D. Molgaard** is listed below.]

Charleston Gazette (WV)
May 9, 2009

Smiles and scowls
Author/Byline: Gzedit

To City Manager **David Molgaard** and other Charleston officials who streamlined City Hall bureaucracy and saved \$372,000 in salaries without laying off any employees.

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

Charleston Gazette (WV)
March 20, 2009

\$80M budget breezes through council

Author/Byline: Jim Balow

In a meeting in which the business at hand lasted barely longer than the invocation, City Council members approved Charleston's \$80.3 million budget for the fiscal year that starts July 1.

Unlike past years, there was no debate, no issue, no controversy over this year's budget-making process, which began about a month ago. No questions about how to give pay raises (everyone except elected officials gets 3 percent more), no hand-wringing about whether to cut funding for the health department.

That may reflect the rather bland nature of the 2009-10 budget, which looks a lot like the current one except for necessary increases in pension payments, health-care costs and prices of supplies such as gasoline and road salt. And it may reflect the relative health of the city economy, which continues to bring in more and more revenue despite the national recession.

City Manager **David Molgaard** and Finance Director Joe Estep predict business and occupation tax revenues will rise by \$3.65 million over their estimate at this time last year - which accounts for most of the \$4.47 million increase in the overall budget. They attribute that to the recession-resistant fact that the city is full of doctors, lawyers and accountants. The service segment of the B&O tax brings in more than twice as much money as retail sales, Estep says.

Property tax estimates are also up \$744,000 over last year. Part of that includes a tiny increase in the levy rate. A typical homeowner with a \$100,000 house will pay \$1.68 more in real estate property taxes next year, **Molgaard** has said.

Council members will set the new levy rates during a special meeting at 5:30 p.m. April 21. That meeting, like the one Thursday, is expected to be a brief affair.

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David Molgaard
(Articles are in reverse chronological order)

Charleston Gazette (WV)
July 22, 2008

City Council settles suit by former collector

Author/Byline: Jim Balow

Charleston City Council members agreed Monday to settle a 2003 lawsuit filed by former City Collector Jim Jones, who alleged that former Mayor Jay Goldman wrongfully fired him in 2001.

Under the settlement, Jones will receive \$50,000 and give up all claims against the city, City Manager told members of the council's Finance Committee earlier Monday evening.

Although Jones was a department head, an at-will employee who could be let go at any time, he alleged in his lawsuit that Goldman fired him because of his attempts to collect back taxes from City National Bank, **Molgaard** said. Goldman was a member of the bank's board of directors. "As you'll recall, the city received a sizable settlement from the bank," **Molgaard** said. "We vigorously defended this. There was a trial in Judge Walker's court. It was a hung jury."

City officials weighed the potential costs of a second trial and decided it made more sense to settle the case, **Molgaard** said. "We were going to spend \$50,000, one way or another. This brings closure. We are not admitting liability. I don't feel it's a win for the plaintiff."

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David Molgaard
(Articles are in reverse chronological order)

Charleston Daily Mail (WV)
April 2, 2008

Agency's \$1.4 million reserve at issue Mayor Jones says health department's fund is much too large

Author/Byline: Matthew Thompson

Charleston Mayor Danny Jones is questioning a \$1.4 million reserve account that the Kanawha-Charleston Health Department maintains. Jones says that's much too large for a reserve fund and contradicts the health department's contention that a reduction in funding contemplated by the city would cause people to suffer. "Their stance that people will suffer without our money is a falsehood," Jones said.

The state Division of Health requires that local health departments keep a cash reserve "equal to at least the past three months' operating expenditures." Lolita Kirk, the health department's director of administrative services, said the agency's annual budget is \$3.2 million. According to state guidelines, the reserve fund should contain at least \$800,000. However, Kirk said, "'We usually go into each year with \$1.5 million.' 'We have that when we start the year over again. We try to stay between \$1.2 and \$1.5 million. 'That is actually our cash. That's our money. It's the total sum of what we have on hand.' She said the department tries not to dip into the fund. 'That's too big for a rainy day fund,' Jones said. 'That'd be comparable to us having an \$18 million fund.' The city budget for the fiscal year beginning on July 1 is \$75.8 million.

According to the city's analysis of health department financial information, the reserve fund has increased by \$100,000 each year since 2004. The analysis also shows that the health department has no debts and has net assets of more than \$2.4 million. The city has contributed \$200,000 annually to the health department in recent years. But last month, at Jones' urging, council voted to cut the allocation in half. The cut was in response to what Jones and others have contended was a lack of cooperation from the health department in a plan that would have had the agency moving to a new location. That would have enabled developers to build a hotel on prime property close to the Civic Center now occupied by the agency. Backers of the plan noted that new jobs and tax revenue would have resulted.

The proposal was scrapped Monday after Angela and Kelsey Harding, who wanted to build the hotel, announced they no longer wanted to go forward. The couple said they had run out of patience because it was taking the health department too long to find new quarters. The Hardings own and operate Harding's Restaurant in Mink Shoals and Sleep Inns in Mink Shoals and Cross Lanes. Jones said it's possible that council could reconsider the reduction in funding for the health department now that plans for the hotel have been scrapped. But the size of the reserve fund suggests the department would be able to easily withstand the cut, he added.

City Manager **David Molgaard** said the administration has decided to require regular oral reports on financial conditions from representatives of agencies that receive city funding. The reports would be presented to council's Finance Committee, **Molgaard** said. He said he's not

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David Molgaard
(Articles are in reverse chronological order)

sure how often the agencies would have to give their reports. "We want to see them from all the entities we give contributions to," **Molgaard** said. "We want them to occur on a semi-regular basis."

Meanwhile, Kanawha County Commission President Kent Carper said talks are still ongoing for a possible relocation of the health department. The county owns the health department property. Carper said he has spoken with Charleston Area Medical Center to help find the department a new home. By finding the health department a new home first, Carper said more developers could show interest in the Lee Street property. "That could happen," Carper said. "We need to clear out the atmospherics first."

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

Charleston Daily Mail (WV)
March 25, 2008

Budget takes big jump in decade Rising costs of utilities, gasoline are cited as part of the reason for hike in Charleston spending

Author/Byline: Matthew Thompson

Charleston's budget has jumped by more than \$25 million over the past decade. When the city approved its budget for the 1999-2000 fiscal cycle, the total budget was \$50.4 million. Last week, the City Council approved a \$75.8 million budget for the next fiscal year, which begins July 1. The figure is up from the \$69.8 million budget that was approved the previous year. City Manager **David Molgaard** said many increases are the result of the rising costs of utilities and gasoline. "It's just a sign of the times," **Molgaard** said. "We had to increase utility costs just like everyone else did."

Contractual items in the budget, which include utilities and professional services, went from \$9 million to \$10 million. Commodity items, which includes gas, oil, and road salt, went from \$3.3 million to \$3.6 million. "We have police officers on duty 24/7, we have fire, garbage, salt trucks and refuse. We have a fleet running that delivers essential services," **Molgaard** said. Fee revenue will go up significantly next fiscal year.

Last year, the city budgeted \$10 million in total fee revenue. This year, the city has budgeted \$14 million. The figure jumped after the City Council upped the \$1 user fee to \$2 last fall. The user fee, paid by anyone who works in the city, is used to pay for police officers added to the force a couple of years ago and for street paving. "We haven't increased anything else in the general budget," **Molgaard** said. "We have not changed any rates." But the Charleston Sanitary Board plans to raise sewer rates by 42 percent next fiscal year. But **Molgaard** said the sanitary board is a separate entity and not included in the city's budget.

Joe Estep, the city's finance director, said many factors have increased the budget since he began with the city in 2006. During his tenure, the total budget has gone up \$12.5 million. It's a total increase of 19.8 percent. He said more than half of that cost, \$7.3 million, is for employee costs such as wages and salaries, retirement and health care. Estep said the growth is made up of \$4.1 million in increased wages and salaries, \$1 million in police and fire pension costs and \$1.8 million in healthcare increases.

In the next fiscal year, the city is planning to open a new health clinic for city employees. The clinic will offer city employees free primary health care services. It will serve about 1,144 employees and retirees currently on the city's health plan. The clinic will be on the second floor of the Appalachian Power Park office building at 601 Morris St. City officials hope employees will take advantage of the new clinic, helping curb costs of doctor's visits and decreasing the amount of time workers miss for doctor's appointments and illness. "The clinic will cost a little bit in the first year or two," **Molgaard** said. "But based on what we have seen from similar programs, it will be a big payoff for us down the line." **Molgaard** said the next fiscal year's

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David Molgaard

(Articles are in reverse chronological order)

budget was easier to prepare as compared to past budgets. He said the city used to rely on time-consuming paper spreadsheets. Now the city uses computer models that offer more precise estimates, he said. "It's easier this year because we have learned lessons from the past," **Molgaard** said. "We keep getting more efficient and further ahead of the game every year."

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David Molgaard
(Articles are in reverse chronological order)

Charleston Daily Mail (WV)
January 7, 2008

\$1 increase in city's user fee goes into effect

Author/Byline: Matthew Thompson

The increase in Charleston's user fee has officially kicked in. Anybody who works in the city will have \$2 taken out of his or her paycheck this week, up from \$1. In November, an overwhelming majority of city council members voted to double the fee, which first took effect in 2004. The increase took effect Sunday night. City officials say the added revenue will help offset projected budget deficits.

The \$1-a-week fee was raising about \$3 million a year, mostly for street maintenance and police services. Those costs make up about 34 percent of the city's annual budget. But the fee was adding up to only about 24 percent, city manager **David Molgaard** said. "With the costs of living and health care and other benefits, it's clear it's going to be increasingly challenging to maintain the force we have now, without some additional revenue to help us," he said.

"If we look out over the next four to five years, it's clear based upon projections that we're going to be facing budget deficits," **Molgaard** said. "We want to keep our current services at the current level without any revenue loss." A five-year budget projection, prepared by the city manager's office, shows expenses climbing to \$83 million a year by 2012, with the city taking in only \$73 million in revenue. The annual budget now is about \$69 million.

Molgaard has said by 2009 the city could begin facing budget deficits — even with the user fee increase. The user fee has been a controversial issue since it was originally adopted in 2004. The fee was challenged in court, and the state Supreme Court ordered the city to put the issue before voters. In July 2006, city residents approved the user fee by a 3-1 margin.

Mayor Danny Jones proposed doubling the fee not long after he was re-elected this year. He was the first mayor in 20 years to be returned to office for a second term. In November, only two of the city's 26 council members — Cubert Smith and John Miller — voted against raising the fee. Miller, who represents Ward 18 in Kanawha City, voted against the fee when it first came before council in 2004, but supported it when it was put on the ballot in July 2006. Miller said he now thinks the fee is going to strain the finances of working families. "It's going to affect the working poor and people on minimum wage," Miller said. Miller said city officials should have cut expenses instead of relying on citizens to balance the budget. "It's just going to be an additional hardship and burden for people to deal with," Miller said.

Although the fee is taken out of every employee paycheck, employers only remit the money to the city every three months. The added revenue won't show up in the city budget until April.

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David Molgaard
(Articles are in reverse chronological order)

Charleston Daily Mail (WV)
July 24, 2007

Mayor says bargaining bill is bad news Federal legislation would require cities to negotiate with public safety unions

Author/Byline: Jake Stump

Charleston Mayor Danny Jones fears that a collective bargaining bill moving through Congress would create dissension between his administration and the city's police and firefighters. The U.S. House last week passed the Public Safety Employer-Employee Cooperation Act of 2007 by an overwhelming 314-to-97 vote. The legislation grants collective bargaining rights to public safety officers employed by states or local governments. West Virginia state employees, including state police officers, do not enjoy collective bargaining rights. For at least 40 years, organized labor has unsuccessfully tried to push bills through the Legislature that would force the state and its municipalities to recognize public employee unions and bargain with them.

However, a few West Virginia cities, including Huntington, have passed ordinances on their own granting collective bargaining rights to their employees. City of Charleston public safety employees currently do not have collective bargaining rights. Under the House-passed bill pending in the U.S. Senate, states and municipalities would be required to have representatives negotiate with unions to achieve contracts dictating wages, benefits and working conditions. "We would go on the defense," Jones said. "We'd lose control of our budgeting process. I'll deal with whatever is sent down from the federal government, but I don't understand the compulsion for the federal government to get into local affairs when they can't manage their own."

All three West Virginia House members - Republican Shelley Moore Capito and Democrats Alan Mollohan and Nick Rahall - voted in favor of the bill. The mayor questioned why Capito would vote with the Democratic majority last week. Collective bargaining is historically an issue backed heavily by Democrats. A spokesman for Capito did not respond to inquiries Monday.

Under the federal legislation, employers and employees would submit to an arbitration process for resolving an impasse in negotiations. That's one of the biggest turnoffs for Jones. "I'm against delegating the budgeting process to an outside arbitrator who doesn't live in the state of West Virginia," he said. Jones believes his administration has taken good care of its public safety workers, particularly firefighters and police officers, without collective bargaining. "Our firefighters are the highest-paid in West Virginia," the mayor said. "Firefighters and police have received a raise every year since I've been in office and I hope to continue that."

Charleston Police Lt. Steve Neddo acknowledges that the Jones administration has fairly accommodated employees. But future Charleston mayors may not be as generous to the city's public safety officers, Neddo said. "Collective bargaining gives us the right to sit down and talk," said Neddo, president of Fraternal Order of Police Capital City Lodge No. 74. "I don't see it as an adversarial type of situation. "The current administration has treated us well, but I've seen times when other mayors would throw us a bone and tell us to be happy." Capital City Lodge No. 74

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David Molgaard
(Articles are in reverse chronological order)

represents officers in the cities of Charleston, Belle and Nitro, and has 350 active members. Neddo, a Charleston Police veteran of 24 years, said he recalls one mayor who literally turned his back to a group of officers asking for a pay increase. He remembers another instance, in the 1980s, when council members demanded the firing of uniformed officers seeking a pay raise.

Neddo said collective bargaining has remained a top agenda item for the national Fraternal Order of Police for several years. "Whatever they give us is what we get," he said. "If we want more than that, we go into collective begging. "Right now, I'm not complaining. Danny Jones has taken care of us. The problem is that we could run into a different administration that won't even talk to us."

Charleston public employees received a 3 percent pay raise this year. In previous years under Jones' reign, the city had given \$1,000 raises across-the-board annually. Of the city's \$70 million yearly budget, \$14.3 million is allocated for firefighters while police get \$12.8 million.

Jones isn't the only city official concerned about the potential passage of the collective bargaining bill. City Manager **David Molgaard** said the legislation could impose another unfunded mandate upon local governments. "This could leave council and the mayor to come up with ways to provide funding," **Molgaard** said. "There are only two ways to do that. You can take funding away from other priorities in city government or find a way to raise taxes or fees."

Molgaard is also opposed to the arbitration component of the bill. "In the worst case scenario, an independent arbitrator would resolve a dispute," he said. "That takes the spending prerogative away from the representatives voted into office who are charged with overseeing the budget. The stewardship of the taxpayers' coffers is taken away."

The bill now awaits Senate action. A similar bill is also expected to be introduced by Sen. Judd Gregg, R-N.H.

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

Charleston Daily Mail (WV)
September 25, 2006

City pays average \$640,000 in claims

Author/Byline: Justin D. Anderson

Since 2001, citizens have filed an average of 118 personal injury and property damage claims every year against the city of Charleston. The city and its insurer have paid out a yearly average of \$640,000 on them, according to information compiled by the city attorney.

Here's the anatomy of a typical claim:

Margaret Mullins and her daughter-in-law, Patricia, were on their way back from an afternoon trip to the Capitol Market on Aug. 22. Patricia was driving Mullins' Buick Century to her Kenwood Road residence and had just crossed over the South Side Bridge on her way to Loudon Heights Road. A truck was rolling down Loudon Heights painting yellow lines on the pavement. "We got over as far as we could," Mullins said. "He just came down through there. He didn't realize he had sprayed our car." Now the driver's side of the car has a yellow stripe. Because the Mullinses believe the city of Charleston should have stopped traffic while the road lines were being painted, they filed a claim to pay for the damage to their paint job.

Over the last five years, a total of 592 claims have been filed. The numbers of claims filed annually against the city stayed pretty consistent over that time, except for 2003 when widespread flooding destroyed or damaged about 200 homes in Kanawha County. In all, 222 claims were filed against the city that year, the majority against the city engineer and street department. The city ended up forking over \$289,194 in property damage claims. "Many of those, I think, we handled without a lawsuit being filed," said City Manager **David Molgaard**. A lot of the cases were folks who filed affidavits for claims against the city that were later handled by the Federal Emergency Management Agency, he added.

Charleston's insurance policy currently requires the city to pay out of revenue anything up to \$300,000. For valid claims under \$15,000, city officials or the city's third party administrator usually just cut a check. Anything over \$15,000 must be approved by City Council. **Molgaard** said the city's insurance policy is somewhat unique in that it allows the city to assume more of the risk to keep the premium payments down. "We almost become a small insurance pool ourselves," **Molgaard** said. "It's worked very well for us."

Claims usually are the result of instances like people tripping over bricks on a downtown sidewalk, or a garbage truck backing into a vehicle. Sometimes, the incidents are more serious, as when former police officer Brandon Tagayun, on his way to a domestic violence call in Kanawha City, collided with a pickup truck driven by Patsy Sizemore, who was killed. The city ended up settling with the Sizemore family in July for \$1.8 million, the largest single payout in recent years. The city was responsible for paying \$300,000 of that amount.

Internet – Newspaper Archives Searches**David Molgaard*****(Articles are in reverse chronological order)***

The police department has been responsible for the bulk of the claims the city has had to pay. Over the last five years, claims filed against the police department have cost \$539,006 in personal injury and property damage. The city ambulance service is next, costing \$350,000 on one claim for personal injury in 2001 and \$4,530 in property damage. The street department rounds out the top three, responsible for \$88,555 in injury claims and \$248,185 in property damage.

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

Charleston Daily Mail (WV)
December 21, 2005

Budget has no real surplus, Molgaard says Revisions totaling \$11 million represent funds already committed to projects, purchases

Author/Byline: Justin D. Anderson

If the city of Charleston had nearly \$11 million to spread around in its budget, some may wonder why it can't just wipe out the user fee. City Manager **David Molgaard** said it's not that simple. The budget revisions passed Monday by city council dealt with money that was previously committed to projects or not yet dedicated to various accounts. A lot of the money was directed to initiatives meant to further the city's vision for vibrant tourism, increased revenue collection and quality of life issues, **Molgaard** said. "You can't say that we have a surplus, or excess funds sitting around," he said. "They're spoken for."

The state Supreme Court of Appeals this month ordered the city to hold an election on the user fee. City leaders have said street paving and police protection would suffer if citizens did not approve the fee, which amounts to a dollar a week for those who work in the city. The fee brings in an estimated \$2.5 million a year. The budget revisions included an additional \$800,000 in hotel/motel tax revenue after the council doubled the percentage it collected when a new state law went into effect over the summer. All of the money for the revisions was available in part because of conservative budgeting practices, **Molgaard** said. For example, the city budgets as if city workers make the maximum salary set for their positions. And it under-budgets for various revenue sources. The city also has \$4.2 million set aside for things that are budgeted but whose bills are not due yet. For instance, money is set aside for a fire engine the city ordered and budgeted last year, though it is not ready yet.

About \$1.3 million in user fee revenue was dedicated to street maintenance and police training by recognizing it in the budget. It was user fee revenue that had been collected, but not yet spent, city finance director Joe Estep said. About \$383,519 was dedicated to the city's lease and purchase program handled by the city manager. Another \$1.5 million was put into the general maintenance fund account to pay for infrastructure projects such as slips and sidewalks repair. "We did not budget anything for our general maintenance fund in this budget," **Molgaard** said. "We could have, but the more prudent thing to do would be to see where you end up. "We never run out of things to do around here. It's a matter of having funding to do it."

Council took into consideration about \$4 million in undedicated revenues from last financial year, of which an additional \$631,845 was added to cover anticipated increases in fuel and utilities costs. **Molgaard's** \$15,247 raise also came from these revenues. So did \$204,485 in salary and benefit expenses for eight new positions within five departments. The money will fund these positions for six months with the intent to make them full-time positions. "We've been very judicious in creating and not creating positions within the city," **Molgaard** said. "If you look at the positions we created, almost all of them are designed to bring in revenue. "Ultimately, they should pay for themselves."

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

About \$1 million was transferred to general maintenance, some of which will pay for improvements to City Hall, such as exterior cleaning and windows upgrades. Council dedicated \$33,000 to build a wall in Kanawha City to separate a residential area from a business district. To provide a \$1 million cushion for bad years in health care claims, council shifted \$200,000 into a reserve fund. "This year we had a very good year," he said. "Our claims were probably \$1 million less than what was projected."

The city had already committed itself to an aerial mapping project in conjunction with the Charleston Sanitary Board and had to dedicate \$175,000 to the project. Another \$300,000 was set aside for future design on the riverfront development master plan. Another \$82,500 was dedicated to the city's various festivals. "It's a matter of setting priorities to make Charleston a more attractive place to bring visitors," **Molgaard** said. "At the end of the day, we could close all the swimming pools and the recreational centers . . . We could just really scrimp by and come up with \$2.5 million, but who wants to live like that?"

By law, the city had to divvy up the additional hotel/motel tax revenue in a way that gave half to the Charleston Convention and Visitors Bureau and the rest to tourism-related items in the city.

Council gave the bureau \$440,000 and divided the rest among various festivals and the mayor's office to help them attract convention guests. **Molgaard's** office was provided with \$60,000 to pay for a previous evaluation of the bureau's performance and design work for a canopy at Haddad Park.

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **David D. Molgaard** is listed below.]

Charleston Daily Mail (WV)
December 15, 2005

Views varied on city manager's raise Council finance panel agrees hike is warranted, but members disagree on the appropriate amount

Author/Byline: Justin D. Anderson

Tom Lane, Charleston City Council president and finance committee member, said a \$51,000 raise for City Manager **David Molgaard** would be justified. "I think the city has to be able to afford to pay people what their positions are worth," Lane said Wednesday. "If we don't, we will not be able to attract well-qualified people. "Our existing revenue sources are growing enough that we should be able to accommodate additional salaries in our top positions."

Other council members on the finance committee were not so generous in what they're willing to suggest for **Molgaard's** raise, though all agreed his position deserves a higher salary. The committee will take up the issue as early as Monday and may eventually take up raises for all managerial positions with the city.

Molgaard's salary has gotten particular attention because he has said he's been courted by other cities willing to pay him more. **Molgaard** currently makes \$79,000 a year.

Councilman John Miller said the city manager deserves a raise, but nothing exorbitant. And he doesn't believe the manager should make more than the mayor. For the current financial year, council approved an \$80,000 annual salary for the mayor. Miller at first said he could see **Molgaard** being bumped up to \$100,000, but then he changed his mind. "If that's the case, then the mayor would want a raise too," Miller said. "If you have that, you have a domino effect."

Councilman Bob Reishman, who chairs the finance committee, said any raise for the city manager would have to be within reason, no matter what other comparable cities are paying their managers. "I don't think we can always compete with other cities," Reishman said.

Reishman said **Molgaard** has been an asset to the city. "The city has benefited greatly from his work and dedication," Reishman said. "I certainly think it's important to do what we can to keep him."

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

Charleston Daily Mail (WV)
October 25, 2005

City may shift drug benefit, Charleston officials hope to transfer \$401,000 - in liability to the federal government

Author/Byline: Justin D. Anderson

Charleston City Manager **David Molgaard** said he plans to eliminate current retiree prescription drug coverage for former city employees in favor of a new federal Medicare benefit available by the first of the year. In doing so, the city hopes to shift about \$401,000 in plan liability to the federal government by 2010 while the pool of eligible retirees rises from 340 to 495. An actuary completed analyses for two scenarios for retiree drug coverage by examining the various participants' costs should the city retain its current coverage and accept a federal subsidy or eliminate current coverage and help retirees pay their Medicare Part D premiums. "The analysis came back and showed that the federal government would actually be contributing a lot more to prescription drug benefits," **Molgaard** said of the latter scenario.

The new drug program was developed as part of the federal Medicare Modernization Act. Under the provisions of the act, employer subsidies were authorized equal to about 28 percent of retirees' prescription drug costs. "I think at the very least, it's understood that the city's going to pick up the premium for the federal government's plan by reducing the premium that the employees pay for the other health care coverage" offered by the city, **Molgaard** said.

If the city held its current course and accepted the federal subsidy, they city would be responsible for paying \$866,000 toward drug claims during the year 2010; the federal government would pay \$428,000; and the estimated 495 eligible retirees would pay \$834,000. By eliminating the prescription drug coverage and going with the federal benefit, the city's costs fall to \$284,000 while the federal government's costs rise to \$829,000 and retirees' to \$1.01 million.

Molgaard said by reducing premiums retirees pay for other health care coverage, the \$181,000 increase under the new drug plan could be offset. The effect on retirees by changing their prescription drug coverage will "basically be a wash" because of this offsetting process, **Molgaard** said. The details of how to proceed are still being worked out. "I don't think, as I understand it, everybody's going to see a deficit," **Molgaard** said. "The good, obviously, is there's \$400,000 neither the city nor the retirees are going to have to come up with by 2010 to cover prescription drug costs."

To compensate an anticipated "gap" in drug coverage apparently inherent to the federal plan, the city will be looking at other health care products to fill in the gap, **Molgaard** said. "This is something that's coming about all over the country," **Molgaard** said of the federal program. "I think as people learn about it and understand the significance, there's likely to be some questions."

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

Charleston Daily Mail (WV)
October 15, 2004

City slashes workers' comp costs,
Author/Byline: Brian Bowling

* Officials focus on teaching employees ways to avoid injuries

Lifting with the knees instead of the back has helped Charleston cut its workers' compensation costs by more than half in the last three years, state and city officials said.

Bob Bess, director of safety and loss control for the Workers' Compensation Commission, said the city incurred an estimated \$815,244 from 168 injury claims in fiscal year 2001. By comparison, the 110 injury claims filed in fiscal year 2004 have an estimated cost of \$375,057. Most of the change was due to a \$533,255 drop in what the city's self-insured workers' comp program paid in wages to employees whose injuries caused them to miss work.

Tim Campbell, the city's safety coordinator, said each city department now has a risk management coordinator who conducts monthly safety training. The training focuses on each department's highest priority safety issue. Frequently, the highest priority is proper lifting. "Probably our biggest injury creator was improper lifting," Campbell said. "We probably had more back injuries than anything."

Bess made his report to a committee of the Workers' Compensation Board that oversees the disability insurance program's risk management efforts. Lisa Teel, the commission's director of employer services, said after the meeting that the reduction in lost-time wage payments shows the city has effectively decreased the severity of employee accidents.

David Molgaard, Charleston's city manager, said the city has implemented a risk management program that includes regular meetings and training on workplace safety. The program reviews accidents and assesses the layout of design of city workplaces. "We've been working with risk managers that have been provided by commercial insurance services," he said.

The company's self-insured workers' comp program is administered by CompManagement Inc. of Dublin, Ohio.

Campbell said getting employees to think about potential safety hazards, such as heavy loads, accounts for much of the improvement the city has seen in its workers' comp liabilities. "That's helping a whole lot," Campbell said.

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

Charleston Daily Mail (WV)
November 10, 2003

Ex-collector sues city over firing , Man claims action was retaliation for taxing bank

Author/Byline: Kris Wise

Charleston's former city collector has filed a lawsuit against the city, alleging he was fired after trying to collect business and occupation taxes from a bank on whose board former Mayor Jay Goldman served. James Jones, who served 18 years as city collector until his termination in November 2001, is asking for his job back, alleging he was wrongfully terminated because he helped initiate action that resulted in City National Bank having to pay more than \$1 million to Charleston in business tax.

A lawsuit filed last week in Kanawha County Circuit Court claims that once Jones "notified (Mayor Goldman) that he was going to attempt to collect the millions of dollars owed by City National Bank, the mayor began to act with hostility and indifference," toward Jones, the lawsuit states. Jones claimed he helped jumpstart an investigation that found City National Bank was withholding business taxes in many West Virginia cities, such as Charleston and Beckley, where it had branches. The bank claimed it was exempt from paying those cities' business and occupation taxes because it processed financial transactions elsewhere. In November of 2001, the Raleigh County Circuit Court ordered the bank to pay taxes for its branch in Beckley. The ruling helped set a precedent for the bank to pay up for all its locations in the state. Jones says he was fired "without cause" two days after the ruling was announced.

Goldman, who served as mayor from 1999 until June and still serves on the board of directors for City National Bank, said the lawsuit is without merit and Jones' firing was a direct result of his performance on the job. "We had has so many complaints from that office and we would get conflicting numbers so often," Goldman said today. "I was very concerned as to where the city was going as to its revenue and I wasn't getting the right answers."

An audit of the collector's office, done in October 2001 by Gibbons & Kawash, found more than 3,600 missing computer or paper files in Jones' office and collection mistakes that eventually forced the city to pay back about \$300,000 in overcollected business taxes and fees. Goldman said many city leaders and officials were involved in discussions about the office's disorganization, and "these decisions (to fire Jones) were not done in haste and the issue was not taken lightly." "He was there long time, he's a nice individual but I was very much performance-based," Goldman said. "The audit was not accusing anybody or even questioning their truth or veracity, but the operations of that office. The audit clearly identified what problems there were."

City Manager **David Molgaard** said based on allegations and complaints outlined in the lawsuit, "It doesn't appear to me the lawsuit has merit." "The decision to by the (city's) finance committee and counsel to let the employee go had a lot to do with the audit that was conducted," **Molgaard** said. Goldman, who still serves on the board of directors for City National Bank, said he was always careful throughout the investigation into the bank's tax issues to separate his duties as

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David Molgaard
(Articles are in reverse chronological order)

mayor from his responsibilities as a board member. Goldman said Jones did mention the city's attempts to collect taxes from City National, but the city manager and city attorney mostly handled the issue. "Anytime that came up, I would walk out of the room," Goldman said. "You know those are the type of issues you have to stay away from." The mayor also said the main investigation into the bank's tax-paying practices originated in Beckley, not Charleston.

Jones claims that problems in the audit "were of a housekeeping nature." He said prior to his attempts to collect taxes from City National Bank, "he had been held in high regard" by his employers. He also is suing the city for compensatory damages relating to his lawsuit and for attorney's fees. City records show that before his termination, Jones' annual salary as city collector was \$49,570.

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

Charleston Daily Mail (WV)
July 8, 2003

Charleston city manager gets raise, Molgaard is highest-paid official aside from mayor

Author/Byline: Josh Hafenbrack

David Molgaard has been Charleston's city manager for only three weeks, but he's about to get his first pay raise. At Mayor Danny Jones' request, Charleston City Council, in its first meeting Monday night, bumped the top pay grade for city manager to \$77,000 from \$70,000. Also, City Council approved combining two clerk-level positions into one higher-paying job in the city manager's office and raised the pay of another of Jones' department heads.

After the 27-1 vote, the city manager is now the highest-paid person in city government aside from the mayor, who makes \$80,000. Previously, the city manager, Civic Center manager and the police and fire chiefs all made \$70,000. Jones said he plans to pay **Molgaard** "in the low to mid-70s." But, Jones adds, he hopes the city manager makes more than the mayor by the end of his term.

Archie Chestnut was the only council member to vote against the raise, saying it was too early in the term. "You're supposed to give raises to people who perform," Chestnut, a 10th Ward representative, said. "It shouldn't work like this. We must be in the Land of Oz. In the real world, it's not done like that."

Jones, though, said the city needs to pay a wage competitive with the private sector to the city manager, who manages the city's 800-person work force and \$55 million budget. "The time to do it is in the beginning," the mayor said. "We want to keep (**Molgaard**) and show him we're willing to make an investment in him. "It's a reasonable amount."

In an effort to streamline the city manager's office, council also voted to eliminate the senior clerk and staff assistant positions, which pay \$23,107 and \$32,595, for the position of operations coordinator. The operations coordinator will make \$46,865. **Molgaard** said the operations coordinator will function as an assistant city manager, overseeing purchasing and bidding.

In the final pay-scale change, council approved increasing the pay of the human rights manager to \$58,962 from \$52,830. Jones said he requested the change to keep Brian King's salary the same as it was under the previous administration, when King was the parks and recreation director.

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David Molgaard
(Articles are in reverse chronological order)

Charleston Daily Mail (WV)
June 3, 2003

Great expectations, Molgaard, his colleagues confident he can do a good job as city manager

Author/Byline: Josh Hafenbrack

ASK his City Council colleagues about the kind of job they expect **David Molgaard** to do as Charleston's city manager and you'll get nothing but effusive optimism. The 40-year-old Republican is ending only his first term on council, but he has earned the deep respect of his brethren for his sturdy dedication and lawyer-trained eyes. He lost his re-election bid, but **Molgaard** ended up with the city's highest non-elected position as City Hall's No. 2 man. He will run the nuts and bolts of city government and manage the \$55 million budget under Republican Mayor-elect Danny Jones. "Given my background, my experience, my education - (being city manager) seems to be something that my life work has been leading to," **Molgaard** said. **Molgaard** was appointed to the \$70,000-a-year job by Jones, and he'll take over the post after the outgoing council, on which he serves, has its final meeting June 16.

A local lawyer, **Molgaard** once considered running for mayor himself but instead settled on trying for a second term as the West Side's 5th Ward representative. He lost in the Republican primary to Teresa "Tricky" Reed. **Molgaard**, though, quickly distinguished himself on council for delving in-depth into some of the city's most pressing issues. He became one of a handful of council members intensely involved in negotiations for Charleston's \$23 million baseball stadium and was part of Mayor Jay Goldman's famous - or infamous, depending on one's point of view - "inner circle." "David is an incredibly talented individual," said Republican Minority Leader Tom Lane. "He has...gained the respect of the current council as much as any first-term member I have ever seen." **Molgaard's** popularity stretches across party lines. "He is very smart, patient and even-tempered in his ways in council, and that proved to be very effective," said Democratic Majority Leader Charlie Loeb. "He commanded respect from all members on council for the intelligence and the fairness he brought."

As city manager, **Molgaard** will be on the other side of the administration-council divide. City managers have typically divided their duties into two areas: managing the city's day-to-day affairs and communicating the city's financial position to council. Mayor Jay Goldman has used his city manager, Sherry Risk, as a spokeswoman for his administration, but that role will likely be taken on by the media-inclined Jones and top aide Rod Blackstone. Since **Molgaard** just rose from the ranks of council, he's in a good position to communicate with the 27-member body, council leaders say. "He knows right off the bat where the major issues are that need to be addressed, and he'll also know a lot of the internal debate, how to handle those kinds of issues," Loeb said.

Added **Molgaard**: "I know how things come about, how they progress. I have seen how City Hall works, particularly from the council side of it. It's important to have a strong working relationship with members of council. They are the checks and balances on any administration."

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David Molgaard
(Articles are in reverse chronological order)

As city manager, **Molgaard** will sit in on finance committee meetings - where most council decisions are made - and field questions on everything from why certain streets aren't paved and potholes aren't fixed to the city's most crucial financial questions. "They have to have an encyclopedic knowledge of all the things that are taking place," Lane said.

Jones said the chief reason he picked **Molgaard** to run City Hall was his experience, both on the finance committee and as a lawyer. "He is a young lawyer, he thinks legally, and I like to think I do, too," Jones said.

A Northern Panhandle native, **Molgaard** earned an undergraduate degree in English, a graduate degree in industrial and labor issues and a law degree from West Virginia University. He moved to Charleston in 1990 and has run a solo law practice, focusing on employment-related and personal injury law, since then. **Molgaard** has a wife, Amy, and a 9-year-old son, Ian.

"I'm going to approach my present position as I did with my first term on council - to assume that I might not have another opportunity to contribute to city government," he said. "I'm going to do the best job I can with this administration."

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David Molgaard
(Articles are in reverse chronological order)

Charleston Gazette (WV)
March 10, 2003

D.C. group attacks city wards' ethnic diversity

Author/Byline: Greg Stone

A civil rights group based in Washington, D.C., says it may sue the city of Charleston over what it says are racial inequities in city council wards. In a letter dated Feb. 24, the Lawyers' Committee for Civil Rights Under Law says it intends to file a complaint "to challenge the current system of elections for Charleston City Council." The committee's attorney, Cara Fineman, did not return a phone call. In the letter, she says she is representing REDEEM - a black advocacy group headed by Romona Taylor-Williams - plus the Charleston branch of the NAACP and several black residents of Charleston.

Of the 78 City Council candidates on Tuesday's primary ballot, 12 of them - 15.3 percent - are black. According to the 2000 U.S. census, 8,048 black residents are included among Charleston's 53,421 people, 15.3 percent of the city's population. "I guarantee you, this is the most [ever]," City Council candidate Cubert Smith said of the number of black candidates. "I've lived in the city 30 years." Smith, one of the 12 black candidates, is running as a Democrat in the 8th Ward on the West Side.

City Council has 20 ward representatives and six at-large members, who do not represent a specific ward. Last year, a special committee appointed by Mayor Jay Goldman and headed by Councilwoman Linda Nielsen added a 21st Ward to better equalize ward populations. Some council observers think 27 members is excessive for a city of 53,000, although the addition of the 21st Ward did not cause a particular uproar among council members. The D.C. group advocates a plan that would create 27 single-member wards that are "compact and not bizarre in shape," according to Fineman's letter. Some of Charleston's current wards are indeed unorthodox in shape, including the West Side's 4th Ward, which snakes out to take in the Orchard Manor housing project, and the East End's 11th Ward, which includes both a section of valley floor and the eastern hill along Greenbrier Street.

The group's plan would eliminate council's at-large positions and further shrink the size of wards. "The current redistricting plan splits African-American communities and although African-Americans comprise 15 percent of the city of Charleston, there is not one majority African-American precinct in the 21-district plan," the letter says.

Councilman **David Molgaard** sat in on a series of meetings in December, as Nielsen's committee dissected numbers and looked at several redistricting plans. The focus seemed to be on pure numbers, juggling some precincts from one ward to another to redistribute population. But the new ward it created, the 21st, is a mostly white, wealthy area above Kanawha City. "There might not be one majority African-American precinct, but there are two African-Americans representing wards," said **Molgaard**, an attorney. The council's two black members are Kenneth McKnight in the 4th Ward and Jim Harris in the 12th Ward. "We must be doing

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David Molgaard
(Articles are in reverse chronological order)

something right. They're getting elected out of wards that don't have a majority of minorities," **Molgaard** said. "I just don't see how our redistricting could've been anything other than it was." Both **Molgaard** and Smith point out that the state Legislature a few years ago carved out the 31st Delegate District in the middle of Charleston, in hopes of attracting minority representation. Since it was created, the district has been represented by Nelson Sorah, Mark Hunt and Carrie Webster, all of whom are white.

Black candidates running for City Council include Democrats McKnight and Geneva Foster and Republican Braxton Broady in the 4th Ward; Democrat Pamela Gwinn Minimah in the 6th Ward; Smith in the 8th Ward; Independent Janet Thompson in the 9th Ward; Democrat Charles Ellis in the 10th Ward; Harris in the 12th Ward; and Republican John Miller in the 18th Ward.

Charles Minimah and Jerry Ware, both black, are among 11 Democrats vying for six at-large nominations. Republican Tony Jackson is also an at-large candidate.

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David Molgaard
(Articles are in reverse chronological order)

Charleston Daily Mail (WV)
December 20, 2002

Renewal proposals blasted - Black residents say city targeting their communities

Author/Byline: Josh Jafenbrack

Most of the several dozen speakers who addressed city officials in Charleston City Hall's council chambers had one resounding message: They don't want the Charleston Urban Renewal Authority in their neighborhoods. At a two-hour public forum Thursday evening, two controversial proposals that would expand the authority's powers to combat run-down parts of town were presented to the public for the first time.

One proposal is to create a "scattered sites" urban renewal plan, which would allow the agency to condemn individual, dilapidated homes and tear them down. The city would then use federal funds to rebuild homes on the properties. The other, more contentious, idea is to create a "community preservation district," which ultimately would allow the authority to target the 36-block area in the East End for new projects by using eminent domain. No action was taken on either proposal.

Minorities at the racially polarized meeting said the agency is trying to destroy African-American neighborhoods. About a dozen East End residents who vehemently oppose the authority wore buttons that had the words "Eminent Domain Abuse" encircled with a red line drawn through it. They also held up signs that said things like: "Is it urban renewal or black folk removal?" and "CURA: stop targeting the black community." Another sign, invoking the controversy that has engulfed U.S. Sen. Trent Lott, R-Miss., over his remarks about segregation, said, "Introduced by America's Greatest Dixiecrats."

Allowing the authority to create the community preservation district drew the most heated response. The plan is similar to one that was shelved earlier this year when a fury erupted over the agency's plan to tag the East End area north of Washington Street as "slum" and "blighted." This proposal doesn't use either of those words, instead saying that it would allow the agency to pursue projects that could spruce up the neighborhood before it further deteriorates. Nevertheless, the plan was harshly criticized by about 20 black residents who said it is an attempt to displace minority communities.

Shelise Taylor, 32, said her grandparents were uprooted by an urban renewal project similar to the one Charleston is considering. "Now my parents are going to be forced out with the exact same thing," she said. Robert Hardy said, "We used to call it Urban Move the Brothers. I have seen the displacement of our community, and it has scattered our people."

Some people supported the community preservation plan, which has been approved by the agency. John Hicks said he lives in an area of the East End that would be included in the community preservation district. He said his property values are half that of homes a block away,

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

and he's for any idea to fix-up neglected parts of town. "There has to be a force; there has to be some help," he said.

Councilman **David Molgaard**, who helped craft the community preservation proposal, said the issue is being mischaracterized. If City Council passes the community preservation district, it would not authorize any specific action, but only endorse the idea. Specific uses of eminent domain or any new projects would go through their own set of public hearings and must be approved by the agency and City Council, during which time residents could voice their opinions. "There's a gross misunderstanding as to what this resolution does," **Molgaard** said.

Meanwhile, the "scattered sites" plan garnered more sedate debate but was still met with skepticism. Several residents said if the city were to enforce the housing standards on the books, it wouldn't need the new proposal. The scattered sites plan, modeled after similar programs in other West Virginia cites, would allow the city to create a list of run-down homes that the authority would use eminent domain to take over and demolish. The agency would invest \$100,000 into a revolving fund that would be used for the property acquisition and demolition. Then, the city would rebuild on the properties using federal funds.

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

Charleston Gazette (WV)
December 6, 2002

Councilman Molgaard won't seek mayor's job, he says

Author/Byline: Greg Stone

Charleston City Councilman **David Molgaard** became the latest local politician to pass up a bid for mayor. At a media conference at City Hall Thursday, **Molgaard** said he would not seek the Republican nomination against Danny Jones. No other Republicans have announced their candidacy.

Those who had urged him to run flattered him, **Molgaard** said, but ultimately his decision seemed to weigh most heavily on two factors: his relative lack of experience in government and the heavy name recognition of Jones and Democrat Chris Smith. "It might be better to take the time to mature, learn the ropes and develop more relationships," said **Molgaard**, 39, a private attorney. **Molgaard** had never held political office before running for council in 1999.

On council, he has quickly developed a reputation as an innovative problem solver, one willing to listen to a broad range of opinions, and as an astute observer on matters of finance. He was particularly instrumental in insisting on a "second chance" for offending city employees when council passed random drug testing earlier this year. **Molgaard** also served as an integral part of the negotiating team that worked out a new baseball stadium lease deal with Charleston Alley Cat owner Tom Dickson.

Molgaard said he would again run for council in his 5th Ward, part of which lies in the Edgewood section of the West Side. He did not rule out a later run for mayor, perhaps in 2007. "Hold that thought," he said Thursday of people who urged him to run this time around.

"I thought he was going to run," said fellow West Side council member Henry Knauff. "I think he's very well qualified for the job. If Mayor Goldman has a weakness, it's that he has never served on council." Knauff said council experience would make a mayor more sensitive to seeing that his department heads respond to the requests of council and the public.

"I'm glad he's going to wait," said **Molgaard**'s wife Amy, accompanied by their son Ian. "I think it's in his best interest, but I do hope to see him run in four years instead of eight or 12. "We made the right decision. We want to win."

Another potential Republican candidate for mayor, Councilman John Charnock, said he would probably announce whether he would run next week.

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

Charleston Daily Mail (WV)
October 9, 2002

City after lawyers to pay up - Council hires attorneys to find way to collect business tax
Author/Byline: Josh Hafenbrack

Mayor Jay Goldman's thinking was simple: hire lawyers to go after lawyers. Lawyers, more precisely, who don't pay business and occupation tax revenues. Many out-of-town attorneys who descend on Charleston for mass litigation like the ongoing asbestos trial, city officials said, never fork over B&O taxes from their winnings. So Charleston City Council hired lawyers of its own to go after the transient attorneys who win settlements in Charleston-based trials. On Monday, City Council hired two Charleston firms, The Tinney Law Firm and George and Lorensen, to research the issue and set up a system by which city officials can track non-resident lawyers who try cases in the capital city. This would allow the city to take its share of the earnings, they say. "I think there's a tremendous potential for this thing," said Goldman, who has been working on the project for several months. The city could collect from both plaintiffs' attorneys, who primarily work on a contingency fee basis, and defense attorneys, who mostly earn at an hourly rate, Goldman said. The B&O collection argument is grounded on sound legal footing, said John Tinney, one of the lawyers representing the city. All business earnings in city limits, including lawyer contingency fees, are subject to B&O taxes, he said. "It's a fairly straightforward position," he said. "All of the West Virginia lawyers have been paying (B&O taxes) for years." In fact, once a system is in place to collect the overdue money, the city can go back up to three years - the statute of limitations - and collect B&O taxes from lawyers whose cases have long since been settled, Tinney said. But Tinney did, however, acknowledge there is no precedent in West Virginia for a case like this, and a legal challenge from out-of-state attorneys is all but inevitable. The city's take would come from lawyer contingency fees, not overall settlements. For example, if a jury handed down a \$1 million award, the portion gobbled up by attorney fees could be 40 percent, or \$400,000. The city charges a 1 percent service fee, so it would be entitled to \$40,000 of that pot, Tinney said. Goldman said with high-profile cases coming through the seven circuit courts and several federal courts located downtown, the city could see a "tremendous" windfall in B&O revenue.

The plan has broad-based support from City Council, but several council members are worried the city might rack up lawyers' fees of its own before it sees any benefit. The two law firms are charging the city both on an hourly basis, ranging from \$85 to \$200 per hour, and a 25 percent contingency fee. Goldman appointed a council oversight committee of four lawyers - **David Molgaard**, Tom Lane, Larry Roller and Charlie Loeb - to make sure money isn't being wasted. **Molgaard**, a Charleston attorney, said the \$200-per-hour charge is pretty steep, even for modern-day lawyers. "That's a pretty healthy rate," he said. Tinney, a senior partner at his self-titled law firm, said all of the lawyers discounted their rates out of deference to the city government. The city can get out of its agreement with the two law firms at any time if they are not proving advantageous, Goldman said. "We want to be sure that we're not overpaying the attorneys," the mayor said. "We don't want to ramp up all these legal fees and find out we really don't have a case. If the costs are getting prohibitive, we'll cut them loose."

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

Charleston Daily Mail (WV)
September 25, 2002

West Side - A stronger police presence must be part of the answer

Author/Byline: Dmedit

WEST Virginians have few expectations left. They expect the hills to be there tomorrow. They expect the rhododendron to bloom in the spring. They expect the crime rate to be low. This year, life on the West Side of Charleston got the unexpected. Gunmen were shooting people. One 30-day period this summer saw 10 shootings.

Police took action. They determined that drugs and prostitution led to many of the shootings. And so police cracked down on these "victimless" crimes. The police used reverse drug stings, in which undercover officers sell drugs and arrest the buyers. K-9 foot patrols were put on the street in the evenings to discourage prostitution.

A police presence alone will not solve the crime problem, Councilman **David Molgaard** said. "This summer has been worst than most in the past," **Molgaard** said. "I do believe that we need to be looking at other alternatives and change some of the elements that cause these incidents. And we have to look at maybe more non-traditional ways of doing that other than throwing police at it."

The Tiskelwah Center now provides alternative activities to crime. **Molgaard** said the center will help restore community pride. In the long run, perhaps this will turn the West Side around. Until then, however, the police are properly giving the West Side special attention. The people of the West Side have a right to live in peace, without fear and trepidation. Charleston should not put up with anything less.

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

Charleston Gazette (WV)
October 2, 2001

City OKs new policy for drug testing

Author/Byline: Greg Stone

Thanks to relatively impassioned crusading from Councilman **David Molgaard** Monday night, City Council passed a "second chance" drug-testing policy. Council approved **Molgaard's** amended version of the drug bill 14-11, despite sharp opposition from colleagues Ed Talkington, Ditty Markham and others.

Molgaard has argued for months during the bill's formation in council's rules and ordinances committee, that the about 800 city employees to be tested should not be automatically terminated upon a positive urine test.

Both the amended section of the bill and the total bill passed. The city's drug policy will take effect in five days, City Manager Sherry Risk said. Under the amended version, employees will keep their jobs when they test positive if within 48 hours they waive their right to a hearing before any applicable board.

Further, the employee must pay for a treatment program and submit to unannounced testing of six or more tests in the following 12 months. He must agree that the city be privy to details of his treatment. A substance-abuse professional may certify that the person is fit to return to work.

"I think the city may be facing a liability nightmare for not firing a person the first time," Talkington said. Charlie Loeb, majority leader and rules and ordinances chairman, agreed. "I'm concerned for the man on the street," Loeb said. **Molgaard**, a lawyer, conferred with City Attorney Jill Harlan, who said she doubted the city would be liable for damages inflicted by an employee. Councilman Larry Roller shook his head in disagreement.

Firing a person upon the first positive test only creates an unemployed person who probably won't be able to find another job, **Molgaard** said. "We're not addressing the problem," **Molgaard** said. "Are we really doing anything? No, not unless we give the person a second chance."

Molgaard pointed to a Sept. 4 proclamation by Mayor Jay Goldman declaring "Drug and Alcohol Recovery Week" and extolling the work of substance-abuse therapists. Council President Howard Quick supported **Molgaard's** amendment. "I don't how many of you go to church," Quick said, "but the Lord gives us more than two chances."

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

Charleston Daily Mail (WV)
April 3, 2000

Actually, one vote can count - Elections have been decided by single person

Author/Byline: Brad McElhinny

- EDITOR'S NOTE: With the hope of educating and motivating readers to vote, the Daily Mail will feature articles every Monday between now and the May 9 primary on the electoral process in West Virginia.

Who says your vote doesn't count? One vote made the difference in **David Molgaard's** primary race for Charleston City Council. The same goes for Eleanor Mayor John Harris, who tied in a race for Town Council several years ago and conceded the seat. Joyce Abbott won her seat on Bancroft Town Council after a tie. St. Albans resident Rick Adkins won a Town Council race by one vote and earned the nickname "Landslide."

"You'd be surprised the number of people who come up to you and tell you they just didn't make it to the polls that day," **Molgaard** said. "That was definitely a classic civics lesson as to how every vote counts. Don't miss an election."

The odds of being the determining factor in a national presidential race are astronomical. But in a local election, where few votes are cast anyway, there's a chance your vote might decide a race.

"When you're just one vote shy," **Molgaard** said, "you think of one more thing that could have been done, one more person you could have called, someone else's problem you could have listened to."

In his 1999 City Council primary race to represent the Edgewood area of Charleston's West Side, **Molgaard** actually lost by one vote when the results were calculated on election night. But then one challenged ballot was added to the total two days later. That vote turned out to be for **Molgaard**. The Republican Party's executive committee voted for **Molgaard** to represent the party in the general election, which **Molgaard** won.

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **David D. Molgaard** is listed below.]

Charleston Daily Mail (WV)
March 13, 1999

Final election tally changes outcome in council race

Author/Byline: Todd C. Frankel with contributions by Kristen Young

A final tally of Tuesday's city election changed the outcome in a West Side council race in which two Republican candidates were separated by just one vote. In the city's closest race, Teresa A. Moore had been proclaimed winner of the 5th Ward council seat, edging out **David D. Molgaard** by only a single vote, 84-83. But **Molgaard** picked up one vote after the addition of uncounted ballots on Friday. The race is now a tie. A total of 132 ballots remained to be counted following Tuesday's citywide primary election.

The votes had been challenged, or excluded from the count, by poll workers for a variety of technical reasons. Friday, in the Kanawha County Voters Registration Office, the city's board of canvassers prepared to announce a final tally. "This is not something I wanted to see," Moore said of the results. "But I knew there were challenged ballots. I knew this was a possibility when I went in." But **Molgaard**, back in the race, is relieved. "Obviously, I'm very pleased that I'm still in the running," **Molgaard** said. "I'm happy our hard work and effort has not been for not just yet."

The situation was unusual enough situation to require City Clerk Fred Fisk to dig deep into the City Code for a resolution. He said the tiebreaker would be decided in a runoff vote by the 20 members of the Republican Executive Committee. But before that takes place, **Molgaard** plans to ask the other candidates to join him in requesting a recount. A third Republican candidate in the race, Edgell Turley, followed Moore and **Molgaard** by only three votes. "It makes more sense to come together and ask for a recount," **Molgaard** said this morning. "If it's still a tie, we'll have to see what state provisions ask for." Candidates must request a recount within 48 hours of the canvass, and must post a \$300 bond, **Molgaard** said.

Moore said she won't support a recount. "We all worked hard, and you can see it in the results," Moore said. "Now, whoever wins, wins." Moore said she'll "keep her fingers crossed and hope for the best." After five hours of tabulating new ballots, the board of canvassers, made up of three city councilmen, declared the election official on Friday. Forty-eight hours following their decision, which came at about 2:30 p.m. Friday, the election will be certified. Ceremonial certification will take place at a special council meeting on Tuesday.

The day of canvassing was not without its challenges. Tuesday's election presented a special problem because the threat of inclement weather and a mini-epidemic of the flu caused more than 50 emergency poll workers to be called in to work.

Internet – Newspaper Archives Searches
David Molgaard
(Articles are in reverse chronological order)

Regular poll workers had been instructed to vote with an absentee ballot, but the last-minute workers did not have that opportunity. If they worked at a poll outside their precinct, their vote was not initially counted. The votes of emergency poll workers made up the bulk of the 123 new ballots counted on Friday. The remainder consisted of other scenarios, like change-of-address requests that had not yet been processed. No other races were changed because of the new ballots.

Research Compiled by: Nicole Simkins
 Colin Baenziger & Associates



Section 8

J. Mark Rooney

*Fernandina Beach
City Manager Candidate Report*

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Cover Letter and Resume

July 6, 2023

The Honorable Bradley Bean
204 Ash Street
Fernandina Beach, FL 32034

Dear Mayor Bean & City Commissioners,

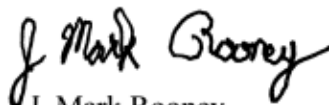
The varied positions and roles I have held in local and federal service will allow me to adapt my leadership and management style to address Fernandina Beach's day-to-day operations as well as your goals and priorities. I have extensive experience with high quality residential, retail and commercial economic development. I have held leadership positions in organizations with a range of 40 to 3,000 subordinates. My combined experience managing people in the municipal sector and in the U.S. Army has given me a unique perspective on leadership in diverse, challenging environments and on managing projects from \$5,000 to \$50 million dollars. I am confident in my ability to facilitate successful intergovernmental consensus, as I have negotiated over 60 in my career. I have consistently worked in diverse communities with a broad range of businesses, housing options and neighborhoods. I have a great deal of experience working in communities where the need to balance redevelopment economic growth with preservation of both community culture and small town character as well as, historic preservation and in Westerly protection of beaches and fragile salt marshes. My varied experiences demonstrates a high level of competence in managing all aspects of local government from a complex urban environment to a stand alone, tourist focused community. Westerly, RI was founded in 1669 and is home to 9 miles of some of the most scenic and popular beaches in all of New England. The population of 25,000 expands to 52,000 every summer, with an additional 10,000 day visitors. Thus, I have experienced the challenges associated with addressing the adverse impacts on the quality of life for residents full and seasonal due to traffic congestion and access to and parking for visitors who are vital to the tourism centric businesses and tax base of the community.

I have had a successful record in financial management, particularly in the areas of budgeting and Capital Improvement Programs (CIP). Over the course of my career my team and I have contracted and completed over \$75 million in new & renovation related construction of city buildings from City Halls, Fire Stations, Public Works facilities and water and waste water treatment facilities. All projects were completed on time and within budget due to prior planning and value engineering of design build contracting. My team and I have completed in excess of \$200 million of road repairs and water and sewer related improvements. I have been blessed with competent Finance Directors and elected officials who allowed my team to hire temporary assistance from Financial Advisors. They helped us develop long range financial feasibility plans in conjunction with bond counsel, in order to develop a sound plan, but one that could be explained and sold to the residents and business stakeholders.

Section 8

I have been fortunate throughout my career to work with councils that work collaboratively with staff in setting strategic and community objectives as well as organizational goals and priorities. This allows me, as City Manager, to build a culture of organizational excellence built on trust. I look forward to an opportunity to meet with you to discuss how I can utilize my can-do attitude, knowledge and expertise to be the transformative, visionary leader that will achieve measurable outcomes. I manage by empowering senior staff to utilize innovation and best practices. I lead by example. I focus on an organizational culture where department heads collaborate, as they have trust in each other and know that I will reward calculated, well planned risk taking in the furtherance of project completion and team and organization development. I set and communicate clear expectations and provide feedback and guidance and hold the organization and myself accountable in meeting the organization's goals and priorities established by the annual budget and the strategic comprehensive plan. I believe in and cultivate a culture of candor. In an era of volatility, uncertainty, complexity and ambiguity, the resulting chaos demands a very different skill set to **manage projects** and processes and to **lead people**. What sets me apart from my peers is an awareness of the importance and the ability to not only lead but to develop leaders at all levels in the organization. I believe having a sense of humor is an integral part of the art of leadership as is a positive attitude balanced with humility and a commitment to empowering, delegating and celebrating the accomplishments of staff and elected officials. I believe that my unique background and breadth of experience will fit your needs and enable me to transition seamlessly into the Fernandina Beach community. Thank you for your consideration.

Sincerely,



J. Mark Rooney

J. MARK ROONEY
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PROFESSIONAL EXPERIENCE

Village Administrator, Round Lake Beach, IL

Sep 2021 - May 2023

Chief Executive Officer for a suburb located 39 miles north of Chicago with a diverse population of 30,000. FY 2022 overall budget of \$40M, 82 FT and 22 PT employees. Responsible for 5 operating departments.

Accomplishments:

- Issued \$10M of new debt, at an interest rate of 2.95%, to complete Village goals for infrastructure improvements, primarily replacement of 80 year old water mains.
- Facilitated the completion of a revision to the Village's Building Permits and Code Enforcement process. Created "Get to Yes" vision for staff to implement Village goal of being business friendly.
- Worked with the Village Board and staff to develop a \$1.5M plan, utilizing the American Rescue Plan Act funding to create an outdoor concert venue and renovate the Village Cultural Center.
- Reduced cyber risk by implementing new hardware and software changes along with major changes to protocols for external and internal system access.
- Successfully secured \$2.75M grant from DCEO-STOCIP that will address storm water flooding. Began process to remove impacted taxpayers properties that require FEMA mandated flood insurance.
- Worked with County Administration to implement framework to establish County wide dispatch for Fire/EMS and Police.

Town Manager, Westerly, RI

May 2018 - Sep 2021

Chief Executive Officer for a coastal community located 2.5 hours from New York and 1.5 hours from Boston, with a population of 25,000 residents / 50,000+ summer months. Home to magnificent beaches, including Watch Hill. Westerly's thriving tourist economy supplements a healthy mix of commercial and residential tax base exceeding \$6.5B in EAV. Responsible for ten operating departments. FY 2019/20 overall budget \$98M. 180 FT and 70 PT town employees, with an additional 350 school employees.

Accomplishments:

- Achieved certification in Rhode Island's municipal Resilience Program, a community focused process to assess current hazard and climate change impacts and vulnerabilities, due to storm surge and sea level rise. One of the first three in the state.
- Assisted policy makers in establishing Plastic Committee. Established plastic bag ban by 2020. Became leader in state to reduce use of plastic straws and utensils in all coastal establishments.
- Established Town's first Capital Equipment Replacement Fund (CERF) and other GFOA best management practices to prevent downgrade of Aa2 bond rating.
- Received first GFOA Distinguished Budget award.
- Implemented E-permitting system to reduce zoning and building permit wait time by four weeks for major projects.
- Lead negotiator for all collective bargaining units, Police, Public Works and clerical staff.
- Initiated process to redevelop closed mill site with US EPA grant funding to make site suitable for redevelopment, creating 45 immediate jobs and potential for over 100 jobs by 2022.
- Worked with staff and Town Council to pass a \$15M referendum for infrastructure improvements. Utilized Rhode Island infrastructure bank and saved over \$1M in bond and interest cost over the life of the bond.
- Managed \$15M capital improvements to town roads. Worked out a decade old dispute between the States of Connecticut and Rhode Island to rebuild a bridge destroyed by Hurricane Sandy in 2008.
- Applied and received \$2M federal dollars to dredge sand from inter-coastal pound damaged by Hurricane Sandy to restore salt marsh and provide beach nourishment on Atlantic Ocean beaches.

J. MARK ROONEY**PROFESSIONAL EXPERIENCE***Accomplishments:*

- Coordinated the completion of a Harbor Management Plan that had languished for 15 years. Resulted in approval by both the Army Corp of Engineers and the Rhode Island Coastal Resources Management.
- Facilitated an agreement with the Rhode Island Department of Environmental Management to improve the management of traffic, parking and trash at state and town beaches utilized by over 10,000 people every weekend from Memorial Day to Labor Day.
- Completed Comprehensive Plan and Zoning Map (1998). State requires every ten years. Last completed in 2006.
- Reorganized Animal Control and Town Dog Pound. Worked collaboratively with nonprofit agencies to reduce operating deficit by \$150K.
- Implemented a third-party billing and scheduling system to reduce police details and overtime by over \$500K in the first year. Increased third-party collections rate by 50%
- Increased grants from less than \$250K to \$2M

Village Manager, Carpentersville, IL**Sep 2010 - Jan 2018**

Chief Executive Officer for a suburb located 32 miles northwest of Chicago. 39,000 residents. FY 2017 overall budget of \$65M, 178 FT and 42 PT employees. Responsible for seven operating departments.

Accomplishments:

- Oversaw the creation of 4 new TIF districts; maintained positive and collaborative intra-governmental relations with impacted tax districts: schools, park and Kane County.
- Negotiated a \$4.3M TIF incentive to bring a \$25M Wal-Mart Super center. (185,000 sq ft and gas station). Generates additional \$1.2M sales tax, \$80K local gas tax and \$650K property tax for the Village.
- Implemented a "priority-based" budget process which resulted in the Village adopting 7 successive balanced budgets with no reduction of service levels and a \$9.7M General Fund balance as of December 2017, a \$6.6M increase from 2010.
- Implemented the reorganization of 9 operating departments to 7 in 2011, resulting in the elimination of 25 full-time and 15 part-time positions resulting in annual savings of \$1M.
- Coordinated the completion of a comprehensive revision of the Village economic development process. Created "Get to Yes" operating slogan to implement Village Board goal of being business friendly.
- Negotiated a new, solid waste contract with a private sector company. Saved the Village \$1M over a 5-year contract term by implementing curbside solid waste and recycling containers.
- Managed the construction of a \$13M, 120,000 sq ft Public Works building and \$2M Village Hall rehab.
- Worked with staff and financial consultants to upgrade the Village's bond rating to AA2.
- Received the Illinois Public Employer Labor Relations Association 2011 James Baird Leadership Award. One of three communities nationwide to receive the National Public Employer Labor Relations Association 2012 Pacesetter Award for the Village's leadership and innovation in collective bargaining. Collectively the agreements saved the Village over \$250K by healthcare and step pay plan changes.
- Increased transparency rating by IPI, an independent watchdog agency, from 46% to 96%.
- Negotiated 12 intergovernmental agreements with various government entities.
- Initiated the Village adopting the Greenest Region Compact 2 to address and act on common public policy issues and multi-jurisdictional challenges regarding sustainability and environmental stewardship.

Chief of Staff, North Chicago, IL (*non-ICMA recognized position*)**Nov 2009 - Sep 2010**

Chief of Staff for a suburb located 35 miles north of Chicago. Diverse population of 36,000. Home to the Naval Station Great Lakes, Rosiland Franklin Medical Center and Abbott Laboratories. FY 2009/10 overall budget of \$37M. Reduced \$2.3M deficit to \$650K.

J. MARK ROONEY**PROFESSIONAL EXPERIENCE****Village Manager, Wheeling, IL****Oct 2006 - Oct 2009**

Chief Executive Officer for a suburb located 25 miles northwest of Chicago. 36,000 residents. Extensive industrial and office parks bring the daily population to over 100,000. FY 2008 overall budget of \$96M, 260 FT and 45 PT employees. Municipal board member of the Northwest Water Commission. Representative to Solid Waste Agency of Northern Cook County, SWANCC. Member of the Board of Directors of the Chicago Executive Airport, the third busiest airport in Illinois.

Accomplishments:

- Maintained Wheeling's AA+ Fitch Investor Services and S&P AA bond rating.
- Manage the \$25M construction of a 48,000 sq ft Village Hall.
- Demonstrated the cost savings of "Design Build" \$13M, 48,000 sq ft Public Works building; \$6.2M, 24,000 sq ft Fire Headquarters facility; \$5.1M, 48,000 sq ft renovation of Police Station and 911 Center. Total savings exceeded \$3M.
- Implemented two new TIF districts and negotiated an 11-year extension of an expiring TIF.
- Negotiated Village purchase of over 30 retail properties, totaling in excess of \$15M to accomplish downtown redevelopment plan. Increased EAV over \$50M.
- Negotiated with Village of Wheeling Park District and Metropolitan Water Reclamation District for the storage requirement of Levy 37, on the Des Plaines River to prevent regional flooding. Created a Forestry Division within Public Works; Managed by certified arborist.
- Created an Information Technology Department; Implemented GIS via an intergovernmental cooperative agreement with 12 communities.
- Negotiated IGA between Wheeling and the Cook County Forest Preserve to create a unique prairie restoration, canoe launch and bike/jogging trail.

Assistant Village Manager, Wheeling, IL**Mar 2003 - Oct 2006***Accomplishments:*

- Lead negotiator for all collective bargaining agreements (Police, Fire and Public Works).
- Initiated request for a "special census" to ensure recent growth from new construction and annexation would be reflected in state revenue sharing figures and utility taxes. \$3M, 6-year, projected fiscal impact.
- Applied and received \$240K Brownfield Grant from IEPA.
- Negotiated exclusive waste hauler contract. \$175K annual franchise payment to Village.
- Negotiated a \$22M TIF incentive for a \$110M, 412 room Westin Hotel, retail and restaurant complex.

City Administrator, Highwood, IL**Feb 1996 - Mar 2003**

First City Administrator in Highwood's 112-year history. Located 28 miles north of Chicago. 5,600 residents. Responsible for all aspects of City administration and policy implementation.

Accomplishments:

- Redevelopment of Fort Sheridan, a former Army base identified for closure under BRACC in 1988 and closed in 1992. Served as Highwood's chief negotiator in the redevelopment of Fort Sheridan from a former military facility to a premiere residential community. Preservation of unique historical and environmental features, which include 92 buildings listed on the National Historic Register and the restoration and conservation of its natural beauty and 2-miles of public beach access.
- Efforts recognized by the Illinois Planning Association in conjunction with the City Manager of Highland Park. Received award for historic preservation and adaptive reuse.
- Negotiated over 40 intergovernmental and developer agreements. Worked effectively with various levels and departments of government, i.e. Departments of Defense, Army and Navy, U.S. Senate, U.S. Congress, State of Illinois, Lake County, Cities of Highland Park and Lake Forest and 5 nonprofit organizations that held land interest on the closed military base.

J. MARK ROONEY

PROFESSIONAL EXPERIENCE

Accomplishments:

- Managed \$4.9 capital improvements to the City's water treatment plant and associated infrastructure to include a new, 1 million gallon water tower.
- Negotiated model agreements for telecommunication providers, which generated over \$400K annually.
- Improved service by contracting with the City of Lake Forest.

Staff Assistant to Senator Paul Simon

June 1992 - Feb 1996

- Achieved bipartisan consensus to facilitate the passage of Senate and House Bills which resulted in the redevelopment of Joliet Arsenal, Fort Sheridan, Glenview Naval Air Station and Rantoul Air Base.

United States Army Officer, Lieutenant Colonel, Retired

Nov 1983 - June 2014

Active Duty

1983 - 1991

Reserve Duty

1991 - 2014

Held positions of leadership and responsibility in domestic and international locations, including Germany, South Korea, East and West Africa. Graduated from military schools with emphasis on leadership, problem solving and cohesive team building skills. Possessed top-secret and compartmental security clearance.

Desert Storm

Oct 1990 - June 1991

Saudi Arabia, Iraq & Kuwait

Operation Iraqi Freedom

Feb 2005 - June 2006

Iraq

Senior Advisor for Military Transition Team (MiTT)

Awards

- Awarded the Bronze Star with V-device for valor, Combat Action Badge.

EDUCATION & CERTIFICATIONS

Graduate of Command & General Staff College, Ft. Leavenworth, KS

Civilian equivalent to Master Degree in Leadership Management

Northern Illinois University, DeKalb, IL

Completed all coursework for Master of Public Administration

University of Nebraska, Lincoln, NE

Bachelor of Science, Economics & History

AWARDS

- ILCMA Special Service Award for Service to the Profession.
- Labor Relations and Collective Bargaining:
 - IPELRA - Leadership Award 2011
 - NPELRA - Pacesetter Award 2012

Section 8

Candidate Introduction

J. MARK ROONEY

EDUCATION

Bachelor of Science, University of Nebraska, Lincoln, NE

Completed Coursework for Master of Public Administration, Northern Illinois University, DeKalb, IL

Civilian Equivalent to Master in Leadership Management, Command & General Staff College, Ft. Leavenworth, KS

EXPERIENCE

Village Administrator, Round Lake Beach, IL Oct 2021 – June 2023
Pop 28,224 75 Full time/22PT w/5 direct reports Budget \$41M w/ \$28M Gen Fund

Town Manager, Westerly, RI May 2018 – Sept 2021
Pop 25,225 Summer 52k 180 FT/75 PT w/12 direct reports \$98M/\$40M Gen Fund

Village Manager, Carpentersville, IL
Pop 39,287 178 FT/42PT w/7 direct reports \$65M/\$30M Gen Fund 2010 – Feb 2018

Chief of Staff, North Chicago, IL 2009 – 2010
Pop 36,000 172 FT/18 PT w/4 direct reports \$37M/22M Gen Fund

Village Manager, Wheeling, IL 2003 – 2009
Pop 36,000 260 FT/45 PT w/8 direct reports \$96M/54M Gen Fund

City Administrator, Highwood, IL 1996 – 2003
Pop 5,600 41 FT/18 PT w/ 7 direct reports \$28M/24M Gen Fund

BACKGROUND – Round Lake Beach

Aging infrastructure in an older section of the community of pre-WWII summer cottages, that became year-round homes without being built to standard building code, nor with adequate sized or quality watermain for the current built-out density. The high failure rate and emergency repair costs necessitate their replacement. Yet, the political challenge of the lower valued properties being primarily Hispanic owned and viewed by the mayor as a drain on the newer higher valued homes presents a challenge of equity. Staff and I utilized the EPA revolving Loan program at 2% interest to address the problem without dramatically raising water rates. I secured a \$2.75 M grant (with a \$75,000 match), that will address storm water flooding, due to disrepair of a 1930's era channel.

J. MARK ROONEY

Major Challenges in Westerly:

The Town of Westerly was founded in 1669. It occupies 35 square miles and possesses 9 miles of some of the most scenic and popular beaches in New England. Westerly's population of 25,000 has a summer population of 52,000, with an additional 10,000 day visitors in the summer. Westerly's thriving tourism supplements a commercial and residential tax base exceeding \$6.5 billion in EAV.

Tourism: The need to coordinate with State Agencies to manage and mitigate the impacts of peak weekends of 10,000 day visitors to the quality of life of permanent and seasonal homeowners. This includes the ability of existing wells during drought conditions meeting summer demands, and traffic impacts primarily on the weekends and summer Holidays.

Budgeting for and maintenance of infrastructure and facilities: The Town lacked both Capital and CERF plans. I incentivized the existing Finance Director to retire and hired an experienced Finance Director who was instrumental in gaining both staff and elected officials buy in to correct these deficiencies. We were able to issue two separate bonds totaling \$18 Million by voter referendum.

Emergency Preparedness: Oversaw the final changes and updates to replace a 15-year-old manual. The focus on hurricane preparation and recovery proved beneficial as we experienced a Category-1 Hurricane and fortunately the eye passed over the Town and the heaviest damage was to our north. My insistence that active shooter training be added was proved necessary within months.

COVID-19: The State and the Governor's "LOCKDOWN" was a stark contrast to my use of the Executive-authority granted to me by the Town Council.

My first action was to close Nursing homes and congregant settings to the Public; to include mitigation steps for the workers of the facilities. Westerly suffered zero Covid deaths with over 350 occupants vs a State wide death rate that exceeded 60%.

I deemed all Town Staff as "essential workers" and I set the goal and established the standard of "open to the Public" and allowed wide latitude on how this was accomplished by departments. I collaborated with staff and allowed Departments to establish the manner and methods to achieve it.

Opened "Beaches" almost immediately and explained to the Governor's office that I would not Order our Police Officers to cite or block people from walking on a beach. After the State opened Liquor stores- I allowed takeout orders from restaurants and eventually authorized liquor to be sold by beach side bars and restaurants an activity prohibited by the Town since 1978, (consultation with every elected official by the Police Chief and I occurred prior to the change).

J. MARK ROONEY

I coordinated with the school Superintendent & Police Chief to create an alternate 2020 High School Graduation. at the Town Beach Drive-Inn. Students were filmed receiving their diplomas in a controlled setting; then at the Town Beach Drive-Inn family and friends honked and applauded from their cars. It took 2-evenings due to the number of students and families, but we made it happen.

Administered 50k shots at the only municipal Vaccine Clinic in the State. Staff and I modified EMA planning documents to coordinate citizen Volunteers and the Yale New Haven Hospital staff and the School Nurses and the Rhode Island Pharmacy school volunteers.

GENERAL MANAGEMENT STYLE AND EXPERIENCE

I recognize that I have the responsibility to (1) create and foster an organizational culture and environment in which trust is valued; (2) to be a role model for integrity and honesty in all professional interactions and encounters. (3) Collaboration is key to achieving a healthy organizational culture. I work closely with staff, empowering them through clear direction and expectations and the metrics success will be measured. I mentor staff and develop them by giving them opportunities to succeed and learn from mistakes, so they will be self-motivated, innovative and entrepreneurial, in their approach to problem solving. (4) I do not rely on my position and title for my authority, as compulsory compliance is far less effective than voluntary commitment. I manage by seeking input, options and feedback and I integrate their views into our plan. I believe there needs to be a discussion on the “why”, the meaning and purpose of a project and the desired outcomes. I provide the vision and guidance and give wide latitude on how and by what means staff adapts and adjusts their efforts to changing circumstances, as people are far more motivated when given autonomy to achieve the desired outcome, without being **micro-managed**. My core philosophy and direction to my direct reports is we **manage projects**, but we **lead people**.

Elected officials would state that (1) I am a proactive, results orientated problem solver. (2) I collaborate with staff to present all reasonable options for council consideration and direction. (3) Politically astute but apolitical, while I always execute the will of the majority on a given issue, I never dismiss the viewpoint of the minority members of the council. (4) I respect the line between the policy maker and the staff role of executing and implementing the priorities of the council.

Staff would state that I am (1) fair and consistent and respectful of others (2) That I am decisive in action and deed under pressure and that I never pass blame onto staff and publicly recognize their accomplishments. (3) I emphasize the importance of developing a positive organizational culture that identifies and nurtures potential leaders. Succession planning and training is not just for senior level positions. (4) That I fully embrace and model the public SERVICE nature of my role.

J. MARK ROONEY

My greatest weakness was a lack of patience and tolerance for individuals with issues of character. The biggest mistake in my career led me to improving my management style and relationship skills. I used sharp and dismissive language, in a public setting, when a candidate for trustee, who was facing domestic violence charges, made a scurrilous charge about my integrity. I held myself accountable by participating in a training seminar conducted by Psychiatrist Dr. Morrison, the leader of the Midwest Leadership Institute, meets monthly with City Managers who work in the Chicago suburbs to discuss “Understanding Human Motivation and Leadership for City Managers”. I participated in a critical strengths assessment and discovered that my weakness was that I can be excessively competitive and focus on task completion over relationships. My strength of managing and dealing with ambiguity and goal accomplishment needed to be tempered with placing a priority on relationships in order to be a better City Manager and kinder person. I am keenly aware and thoughtful of how my mood and attitude impacts others. Each day as I get out of my car and walk into the office, I consciously consider the analogy “what weather am I bringing”. I place a premium on developing and nurturing relationships and have developed habits to ensure that I focus on relationship building. Thus, I make a point to meet one-on-one with every elected official and Department Head monthly to obtain personal feedback as well as discussing status of goals and projects. I know that “active listening” is both a choice that must be made and a skill/habit that must be continuously developed to be effective.

My greatest strength is an optimistic attitude as it is a force multiplier in conveying my vision for a better future or that change can be positive. I possess a reservoir of “grit and resiliency” that provides me the ability to handle and deal with adversity in a calm deliberate manner. I attribute this quiet confidence to my years in the Army and the training and experiences it provided.

I use the City Council’s goals and objectives to form the basis for both budget preparation and a means to benchmark and set the metrics by which Department Heads and I evaluate their performance annually at the conclusion of the annual City budget process. Then we work together in an iterative discussion of the resources required for the subsequent year’s goals and convey this in the budget document for the Council’s discussion and consideration. I have learned to balance quantitative measurement with qualitative, as there is a vast difference between measuring efficiency and measuring effectiveness. Efficiency is a measure of how much each unit of output costs. Effectiveness is a measure of the quality of that output; how well did it achieve the desired outcome. When we measure effectiveness, we know whether our investment is worthwhile. There is nothing so foolish as to do more efficiently something that should no longer be done or does not fit Commission priorities and organizational goals.

Yet, like most government organizations, in the early part of my career I focused on the inputs: how much time is spent on a program or a department, the cost of overtime by department, how many people were served, and what service was received. This is helpful information and required for political accountability and transparency. Yet, as my staff and I developed greater skills we adapted our metrics to focus on outcomes and the results of our processes, so we could demonstrate annually at budget hearings how dollar inputs and staff time tied to policy goals and

J. MARK ROONEY

objectives. For example, in community development, rather than measuring customer satisfaction we often measured the administrative process, i.e., how many permits were issued, how fast were the permits issued. Although, these process outputs are useful metrics they do not measure the policy goal of “improved customer satisfaction.”

This leads to One of my successes that I am very proud of and have utilized in subsequent cities I have served is providing staff with my vision and collaborating with them to internalize the concepts behind the slogan of “Get to YES” as an over-arching vision and guidance to the customer service positions through-out the organization. In deference to building code officials and fire inspectors we added an important caveat of, do not ignore the imperative of life safety provisions. This vision transformed a bureaucratic mindset tethered to rules and “this is how we have always done it”- to that of an engaged problem solver. Employee morale improved as well as the satisfaction of citizens and stakeholders as measured by surveys and feedback received by the council. Front-line staff were empowered to **help** applicants with forms rather than just accepting paperwork or taking payments or logging complaints or service requests in the Public Works department. It is my firm belief that most employees are not the problem as the vast majority are dedicated, talented people who are trapped in bureaucratic systems that were designed for the industrial era, that frustrates their creativity and saps their morale, and absolutely frustrates citizens and stakeholders perpetuating a dim view of government. It is my responsibility along with senior leaders to redesign systems, procedures and rules that incorporate and utilize 21st century technology, (a simple example is e-permitting), to meet the needs of our customers.

I have terminated over 50 individuals, between my public sector and military careers. I have never outsourced this responsibility to the HR Department. I firmly believe that terminations must be done with care, respect and dignity for the impacted employee, and the culture of the organization. It is never about me or my discomfort, but the individual who is being fired. My focus is having a process that is respectful and professional. I seek to have empathy for the individual and their situation.

The challenges I see facing Fernandina Beach are the *opportunities and why* I am interested in the position professionally. I am that candidate *who has a library of solutions* and a demonstrated record of success addressing the issues as outlined in the recruitment brochure:

- Development and Change vs Preservation and Maintaining quaint, vibrant historic district, beautiful beaches and waterways and the character of the community: The Fernandina Beach “Vision Statement” is clearly not anti-development but stipulates it must be sustainable and environmentally sensitive. Staff, has a challenging task in balancing these seemingly contradictory interests but with a focus upon improving the quality of life of the community and the tax base without substantially increasing the demand on town services or stress on the sensitive environment natural resources is a challenge and opportunity to serve as an honest broker in an apolitical manner for the

J. MARK ROONEY

long-term goals of the community. My experience in Westerly dealing with competing interests while updating the Town's Comprehensive Plan and Harbor Management plans by being transparent and staying focused on written policies and processes. Always value people and truly listen to their input on their community.

- Infrastructure: Work with staff and consulting engineers to quantify the problem, the financial costs and options for all capital improvement projects. I have extensive experience in Wheeling, IL and Westerly RI that demonstrates my fit for the challenge outlined in your brochure.
- Personnel: Staff retention is a problem shared by many communities in high growth states like Florida and is not unique to Fernandina Beach. I would look to partner with Nassau County to cost share high demand and scarce available professionals. More importantly implement personnel policies to reflect current employee expectations to become more flexible with work hours and remote options when possible. I firmly believe that attitude and fit is the central feature of a candidate more than credentials in most department level hirers especially the Police Chief. Organizational fit and community fit is essential and including both in the process has worked well for me in the past.
- Quality of life issues related to being an attractive, coastal community are similar to what I experienced as Town Manager in Westerly, Rhode Island. It was common for the beaches to receive ten thousand visitors from a 3-state region on a weekend on top of the twenty thousand who lived in second homes for the summer. I developed a close working relationship with Public Safety to plan for and implement measures that we developed for EMA procedures for hurricane evacuation to deal with traffic and crowd control. We also modified our IGA's with the state and local businesses to deal with the costs of lifeguards and maintaining beach amenities. We did this by engaging our state and federal delegation to improve our grant capacity and building relationships with key state and federal regulatory agencies. The Army Corp was our primary target as all beach and sand dune restoration as well as salt marsh preservation depended on these partnerships. Our federal delegation assisted in our successful grants for sustainability grants addressing sea level impacts.
- Parking: I work collaboratively with the police command team to solve and mitigate resident and business concerns. Rhode Island's residents have a constitutional right to the beach but were silent about access. I often reminded staff that we worked for the residents and business owners' interests first and foremost and their quality of life over the day trippers, who contributed marginally to City revenues, but stained the fragile ecosystem.

J. MARK ROONEY

- Golf courses and Marinas are examples of city owned operations that have been successfully partially and fully privatized without loss of community standards or specific operational imperatives.

DURING MY FIRST SIX MONTHS I WOULD:

- Have conversations with the Council as a whole and individually to listen and understand current situations and establish short-term (1st year) goals as well as mid-term (2-5 years) goals.
- Meet with the Florida ICMA Senior Advisors and the City Attorney to familiarize myself with relevant laws and City codes prior to my start date. Especially, those related to annexation.
- Ask the acting Manager and Department Heads to prepare an orientation binder for me. I would ask them to include the following items: 1. Information about the organization: people and projects. 2. Departmental goals, objectives and responsibilities. 3. Key policy documents. 4. One-page analysis, by Department, of their strengths, weaknesses, opportunities and challenges. 5. I would solicit suggestions about community leaders and stakeholders I should meet, from the departmental perspective. I would review the list with the Commission to gain their insight and direction. I would review this binder often to gain context about both the organization and community.

I have extensive experience with both local and major newspaper reporters. I have been interviewed by all the major networks that serve the Chicago and Providence, RI media markets. (NBC, ABC, CBS, Fox and WGN) I always defer to the Mayor before I assume the role of spokesman. No community activist expected. Although, I am not on any *personal social media* accounts, with the exception of LinkedIn. I have worked extensively with a dedicated staff member and the Police Chief via official social media accounts and City WEB page to inform the public about projects and events and any first responder activities.

I am an avid runner and biker. I enjoy reading autobiographies of historical figures.

I have a strong desire to work and live in a community like Fernandina Beach that values strong leadership and appreciates the collaborative partnership between its City Manager and the community. My extensive experience in negotiating over 60 intergovernmental Agreements (IGAs) will be immensely valuable in addressing budget and service level challenges while prioritizing the City's objectives. Throughout my career, I have been passionate about capital infrastructure projects, despite the stress of financing, managing timelines, and mitigating construction impacts on businesses and residents. The satisfaction of working with staff and

J. MARK ROONEY

elected officials to achieve the end product is deeply rewarding, as it embodies the Athenian Oath's spirit of civic duty – leaving the city greater and more beautiful for future generations. I am passionate about city management because it allows me to transform the vision and dreams of elected officials and community stakeholders into reality. Building upon my past successes, I am confident in my ability to enhance customer service focus and boost morale among frontline staff in your organization. As a leader, I will make a positive contribution to both your community and organizational culture. Fernandina Beach presents a tremendous opportunity for me to be part of a thriving organization and community, where I can contribute and be inspired by the “old Florida” vibrant culture of this special place.

SIX ADJECTIVES OR PHRASES I WOULD USE TO DESCRIBE MYSELF

- Approachable – ability to relate to and engage respectfully with people from every walk of life
- Can-do-Spirit-with thick skin and accepts critical feedback with humility
- Innovative with entrepreneurial mindset (nonbureaucratic)
- Tactful and genuinely authentic leader; uses restraint and humor while obtaining results
- Reputation of candor and integrity
- Leader who inspires trust and builds collaborative teams and breaks down siloes

REASON FOR DEPARTING PAST POSITIONS

WESTERLY: I loved the beauty of the Atlantic and New England, but after Covid and the inability to travel back to my children who were in college and completing H.S. caused me to prioritize family. (Yet, at this point in 2023 my two oldest have completed college and have joined the Army and my daughter is in her Senior year of college.)

ROUND LAKE BEACH: I am grateful for the opportunities Round Lake Beach has provided me, however the position has become routine, and I realize that the mayor and I are a bad fit. Having earned my Illinois municipal retirement, my goal is to take advantage of that financial security and seek opportunities that align with my personal values over the next decade of my professional career.

CURRENT / MOST RECENT SALARY

Westerly \$176,000 and Round Lake Beach is \$193,500.

Section 8

CB&A Background Checks

**Background Check Summary for
JAMES "MARK" MARK ROONEY**

Criminal Records Checks:

Nationwide Criminal Records Search	No Records Found
County	
Lake County, IL	No Records Found
Washington County, RI	No Records Found
Kane County, IL	No Records Found
Cook County, IL	No Records Found
State	
Illinois	No Records Found
Rhode Island	No Records Found

Civil Records Checks:

County	
Lake County, IL	No Records Found
Washington County, RI	No Records Found
Kane County, IL	No Records Found
Cook County, IL	No Records Found
Federal	
Illinois	No Records Found
Rhode Island	No Records Found

Motor Vehicle

Illinois	No Records Found
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Credit

Excellent

Personal Bankruptcy

No Records Found

Sex Offender Registry

Not Listed

Education

Confirmed

Employment

Confirmed

Social Media

Nothing of Concern Found

**Background Check Summary for
JAMES “MARK” MARK ROONEY**

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

**Background Check Summary for
JAMES "MARK" MARK ROONEY
Personal Disclosure**

Name of Applicant: J. Mark Rooney

The following questions are designed so that we will be able to make full disclosure to our client concerning your background. Please answer them honestly. Cutting corners or misrepresenting your past will result in you being eliminated from all further searches conducted by this firm. We understand that frivolous charges are sometimes made and that charges do not mean you were guilty. We also understand that you may have been wronged and needed to seek compensation. The bottom line is that we want to be certain that our client is fully informed. If you have any questions, please contact us for clarification.

Please explain any yes answers on a separate sheet of paper.

1. Have you ever been charged or convicted of a felony?
Yes ☐ No ☒
2. Have you ever been accused of or have been involved in a domestic violence or abuse incident?
Yes ☐ No ☒
3. Have you ever declared bankruptcy or been an owner in a business that did so?
Yes ☐ No ☒
4. Have you ever been the subject of a civil rights violation complaint that was investigated or resulted in a lawsuit?
Yes ☐ No ☒
5. Have you ever been the subject of a sexual harassment complaint that was investigated or resulted in a lawsuit?
Yes ☐ No ☒
6. Have you ever been charged with driving while intoxicated?
Yes ☐ No ☒
7. Have you ever sued a current or former employer?
Yes ☒ No ☐
8. Please list links to all your social media accounts (Facebook / Instagram / LinkedIn / Twitter, etc.) and your personal web page if you have one.
9. Is there anything else in your background that, if made public, would cause you, our client or our firm embarrassment if it came to light through the press or any other mechanism?
Yes ☐ No ☒
10. Please provide a list of any lawsuits in which you are or have been a party either as plaintiff or defendant.

see attached

Attested to:



Signature of Applicant

Please email this form via PDF DOCUMENT to Monique@cb-asso.com or via fax to
(561) 621-5965 no later than 5:00 PM MST 07/17/2023.

(Note: Please be sure to sign the form with your actual signature if you are sending Fax or PDF Document)

**Background Check Summary for
JAMES “MARK” MARK ROONEY
Personal Disclosure Explanation**

Personal Disclosure Questionnaire

Name of Applicant: J. Mark Rooney

10. Please provide a list of any lawsuits in which you are or have been a party either as plaintiff or defendant.

Jim Kelly – A former Village of Wheeling Building Inspector sued over his dismissal in 2008. The Village settled on the eve of the trial in 2013 to avoid further legal costs as advised by the insurance carrier.

Nannette Burns – A former Village of Carpentersville finance employee sued over her dismissal. The insurance carrier for the Village, over the objections of the Village Board, forced settlement as the case would exceed Village SIR.

J. Mark Rooney – Filed a lawsuit against the Village of Carpentersville for breach of contract and violation of the Illinois Wage Payment and Collection Act. (see attached letter from Walsh Law Group, P.C.)

Nancy Markey – A former Town of Westerly human resource employee sued over her dismissal. The insurance carrier recommended settlement as the settlement cost was less than Town SIR.

**Background Check Summary for
JAMES "MARK" MARK ROONEY
Personal Disclosure Explanation**



CHICAGO OFFICE:
30 S. WACKER DR., STE. 2200
CHICAGO, ILLINOIS 60606
PHONE: (312) 466-7683
FACSIMILE: (312) 466-5601

GENEVA OFFICE:
21 N. FOURTH STREET
GENEVA, ILLINOIS 60134
PHONE: (630) 457-4242
FACSIMILE: (630) 262-0644

June 17, 2020

Mr. Colin Baenziger
Colin Baenziger & Associates
2055 South Atlantic Avenue
Suite 504
Daytona Beach Shores, FL 32118

Re: J. Mark Rooney Application

Dear Mr. Baenziger:

My office represented Mr. J. Mark Rooney ("Mr. Rooney") with respect to his separation from employment from the position of Village Manager with the Village of Carpentersville ("the Village") on January 24, 2018. I was asked to provide an explanation of that litigation in support of his application to be the City of Brighton's City Manager. I have reviewed extensive documentary evidence including emails, meeting minutes, memos and performance reviews and interviewed numerous witnesses about the circumstances of his separation. Based upon that review, I can say without reservation that all of Mr. Rooney's performance evaluations had been excellent and he had always performed his duties beyond the expectations of his supervisors.

In 2016, Village President John Skillman was the Village's Fire Chief. At that time, the Village commissioned a lengthy investigation into his management style. Based on the results, he was allowed to resign from his position as Fire Chief in lieu of termination. In April 2017, Mr. Skillman was elected Village President. Not long after his inauguration, Mr. Rooney learned through a co-worker's complaint that President Skillman was referring to a trustee and a trustee's spouse gender-specific derogatory names. Upon receiving the complaint, Mr. Rooney commissioned a brief investigation, which substantiated the claims. Mr. Rooney then insisted that President Skillman apologize to the complainant to defuse the situation. After apologizing, President Skillman told Mr. Rooney, "when I get the votes, I'm going to have you terminated for embarrassing me."

On December 5, 2017, due to one trustee retiring and another passing, President Skillman was able to appoint two allies and create a majority bloc on the Village of Carpentersville Board of Trustees ("the Board"). President Skillman called a special meeting on December 12, 2017, at which time President Skillman announced his intention to terminate Mr. Rooney.

**Background Check Summary for
JAMES “MARK” MARK ROONEY
Personal Disclosure Explanation**

Mr. Rooney’s employment with the Village was governed by an employment contract, executed on August 31, 2010 and amended two times thereafter (collectively, “the Agreement”). Section 4 of the Agreement was entitled “Severance Compensation.” Section 4 (a) provided that “If Rooney is terminated as Village Manager by action of the Village President and Board of Trustees for any reason other than conviction of a felonious act, the Village shall continue to pay Rooney his then current salary and fringe benefits for a period of...nine (9) months after five years of service.” Section 4(b) provides “In the event the Village and Board of Trustees take action at any time to reduce Rooney’s salary and/or fringe benefits in a greater percentage than an applicable across-the-board reduction for all employees of the Village, or...refuse, following written notice, to comply with any other provision herein benefitting Rooney, or in the event that Rooney resigns subsequent to a suggestion, formal or informal, by the Village President and Board of Trustees that he resign, then Rooney may, at his option, be deemed to be ‘terminated’...and shall receive severance compensation in accordance with the provisions of Section 4(a) of this employment agreement.”

As noted above, on December 12, 2017, President Skillman sought to terminate Mr. Rooney’s employment in large part as retaliation for investigating a female staffer’s complaint about President Skillman’s disturbing language. In furtherance thereof, the Village and Board of Trustees offered a separation agreement to Mr. Rooney, with a deadline for acceptance of January 4, 2018 at 12:00 p.m. Mr. Rooney declined to execute the agreement. Shortly thereafter, and upon learning Mr. Rooney had declined to execute the separation agreement, President Skillman notified Mr. Rooney that he intended to terminate him on Saturday, January 6. President Skillman then called a special meeting for Saturday, January 6, 2017.

The agenda for the January 6, 2018 Special Meeting was for “Possible Action by Board on the Removal of a Specific Employee or Execution of a Separation Agreement.” Mr. Rooney and his representative David Limardi were present for the meeting. While the Board was in closed session, then-Village Attorney Steve Elrod stepped out of the meeting and asked Mr. Limardi if he could speak with him privately. Mr. Elrod said that the Board and Village President wanted Mr. Rooney to go on leave while the parties discussed separation. Based upon that representation, Mr. Elrod and Mr. Limardi devised a plan whereby Mr. Rooney would be placed on involuntary leave but would continue to get paid through exhaustion of his sick, vacation and personal time while the parties attempted to negotiate a separation agreement and ultimately end his employment on March 30, 2018. The Board approved of the plan and Mr. Rooney was notified by Mr. Elrod and President Skillman that he was being placed on leave, effective immediately. I have personally reviewed documents and emails indicating the same. Indeed, Mr. Rooney was paid consistently with the agreement for the next three weeks.

Monday, January 8, 2018, would have been Mr. Rooney’s next regularly scheduled work day had President Skillman and the Board not placed him on leave. At 8:20 a.m., more than thirty minutes before Mr. Rooney’s customary start time, President Skillman sent out an email noting “Mark Rooney will not be back to the Village.” On January 9, 2018, then-Village Attorney Hart Passman sent two emails to Mr. Limardi with suggestions of how to communicate Mr. Rooney’s status. The first suggested “Mark Rooney is out sick with a back injury. Marc Huber is acting manager in his absence.” The second email suggested “Manager Rooney and the Village are working out a mutual separation agreement. In the interim, Manager Rooney is on vacation, and Assistant Manager Marc Huber is responsible for all day-to-day affairs of the Village.” It is clear that no one in the Village believed that Mr. Rooney abandoned his position. Moreover, President Skillman would not have

**Background Check Summary for
JAMES “MARK” MARK ROONEY
Personal Disclosure Explanation**

known that Mr. Rooney would not be back to the Village on the morning of January 8, 2018 if he hadn't placed him on leave.

On January 16, 2018, the Village and Board of Trustees again met with the purpose of proposing a third “Resignation Agreement and General Release.” The agenda for the January 16, 2018 meeting read “Action by Board on the Removal of a Specific Employee or Execution of a Separation Agreement.” During the meeting, the Board voted to approve an amended separation agreement for Mr. Rooney. The consideration for the separation agreement was only a fraction of what Mr. Rooney was contractually entitled to if he were separated from employment involuntarily. Mr. Rooney declined to accept the proposed agreement. On January 20, 2018, the Board met again and approved another agreement with amended language. On January 22, 2018, Mr. Rooney notified the Village that he declined the offer.

Upon learning that Mr. Rooney declined to accept a separation agreement, President Skillman immediately called for another special meeting. The agenda for the January 24, 2018 special meeting again read “Possible Action by Board on the Removal of a Specific Employee or Execution of a Separation Agreement.” At that meeting, the Village and Board of Trustees terminated Mr. Rooney by characterizing his involuntary leave as abandoning his position. This was an obvious legal fiction created in an attempt to circumvent the Village's contractual obligations pursuant to the Agreement.

Mr. Rooney was undoubtedly “terminated” under Section 4(a) or (b) of his employment agreement. The motivation for his termination was solely President's Skillman's vendetta against Mr. Rooney as a result of embarrassing himself, not anything that Mr. Rooney did. Mr. Rooney had an excellent reputation in the Village as well as among his colleagues. His unfortunate termination was the result of an impulsive and inexperienced individual, not misconduct and certainly not job abandonment.

On June 20, 2018, my office filed a lawsuit on Mr. Rooney's behalf against the Village of Carpentersville for breach of contract and violation of the Illinois Wage Payment and Collection Act after attempts at informal resolution failed. In December 2019 and after very limited discovery, Carpentersville agreed to settle the lawsuit with Mr. Rooney. The litigation is concluded and the claim has been dismissed, with prejudice. Please understand that Mr. Rooney is not litigious. He had no choice, however, to enforce the contract that he bargained for to obtain the benefits for which he had provided significant consideration. It would be my pleasure to provide any further information available to assist Mr. Rooney with job placement.

Regards,

WALSH LAW GROUP, P.C.

By: _____
Patrick J. Walsh, Esq.

cc: J. Mark Rooney

CB&A Reference Notes

Reference Notes

J. Mark Rooney

Ed Morrone – Former Town President, Town of Westerly, RI 401-932-4768

Mr. Morrone was on the Council that hired Mr. Rooney and he did a remarkable job. Westerly is a tight Italian generational community, and it is not easy to assimilate in a place where everyone knows everyone, and they are all related. Hiring him was a leap of faith, but Mr. Morrone sensed something in Mr. Rooney during the interview process and was never disappointed with the selection. Mr. Rooney became so much a part of the community.

Before you can be a good manager, you have to be a good person and Mr. Rooney was. A mechanic in the public works department was killed on the job shortly after Mr. Rooney was hired, and he found out after his plane landed in Illinois to spend Christmas with his family. He hopped on the next plane back, and never went home to his family that Christmas. He and the Police Chief went to the home of the family to console them. He could not have been more warm, gentle, and caring had he been the manager of Westerly for years, which speaks highly of him. He made a wonderful mark with his performance, his empathy, and his ability to assimilate in the community. He was not perfect, and he had some rough edges but the human part of him and his loyalty is extraordinary.

Since Mr. Rooney was not able to return home for Christmas after the accident, Mr. Morrone invited him to spend Christmas with their family. While there, Mr. Rooney noticed the volunteer fire fighters preparing to protect the community from stray fireworks and walked over to shake everyone's hand and thank them for being there on a holiday. He was authentic and had a great perspective from his military experience. He could not be intimidated, but he had an affinity for the community and the residents cared about him.

When hiring, Mr. Rooney fully vetted the candidates, but some applicants do not always show their weaknesses in the process. He kept the Council informed and worked with them as a team, and he did not favor individual members. He anticipated as much as he could and then moved forward to accomplish much.

A pond in Westerly was decimated and ruined by hurricane Sandy and the dredging was stuck in the permitting process. Mr. Rooney led the process to move 35 cubic yards out of the pond in the dead of winter. Once the pumps were turned on, they could not be turned off because they would have frozen. The process was fascinating, and he handled it well.

The constitution in Rhode Island guarantees access to the beach for residents. For decades the topic has been contentious. Mr. Rooney led the process to determine right of way and had the area surveyed and marked so there would be no question in the future. Some of the paths were overgrown or blocked by fences and he led the process very well. The end product was successful though it was not easy working with wealthy individuals who think they own the water. Another instance of his problem-solving ability involved a veteran's group that was fractured. He brought them together to resolve the issues.

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J. Mark Rooney

Mr. Rooney and the Police Chief had an exceptional relationship and worked extraordinarily well together. They faced a host of recurring issues related to covid with closures and restrictions to bars and businesses. They were timely in submitting reports to the state and the Department of Health. Their vaccination program was excellent, and they vaccinated hundreds of residents seamlessly. They utilized the senior center, staff and more to accomplish the goal. They pulled together and the effort was the pride of the community. As an added challenge, their governor was appointed to a federal board but did not relinquish control, so the Lieutenant Governor's hands were tied. As such, Westerly could not depend on state assistance, but they still moved forward through Mr. Rooney's guidance. He showed great leadership and received only praise for his handling of the vaccine process. He was fearless in an unprecedented and uncertain time.

Mr. Rooney handled the City's finances like his own, he was very astute. Their bond rating is on the way up and he did not overextend the community. He worked very well with the finance director and planned for the future. He was respected by everyone, even those who may not like him personally. He was hands on and worked with staff in the trenches. He led by example. He was very loyal to the community and rode on police boats on weekends to monitor the harbor as part of the mooring and safety program.

One fourth of July weekend Mr. Rooney picked up Mr. Morrone and they drove all over town to talk to business owners in the beach area. In the 45 years that Mr. Morrone has been in business, no town official ever stopped to talk to him on a holiday. Extend yourself and people respond, and the word gets around. Actions like this are why Mr. Rooney is so well respected. He is professional and has so much going for him.

Mr. Rooney has done so much for the community and moved them forward kicking and screaming at times. He brought them through controversy successfully. One such issue related to roads the City plowed for years even though they did not own them, and another was related to a bond issue. Everyone in the community loved him because he was committed to the job and the safety of the community. He was not only respected in the community, but also in the state. Any community would be well suited to have him.

Mr. Morrone has tremendous respect for Mr. Rooney and misses him both personally and professionally. He did a wonderful job in Westerly and is a good family man.

Words or phrases used to describe Mark Rooney:

- Devoutly religious,
- Caring father,
- Laughs easy and appropriately,
- Still knows how to have fun,
- Humble and
- Loyal friend.

Reference Notes J. Mark Rooney

Strengths: Committed and loyal, extends himself, does what is right for the community, professional.

Weaknesses: None identified.

Lisa Pellegrini – Former Development Services Director, Westerly, RI 860-227-9057

Ms. Pellegrini has known Mr. Rooney since 2018 and reported directly to him until 2021. Mr. Rooney was an excellent manager. Communication was a two-way street and they were good at keeping the other informed.

Hiring decisions made by Mr. Rooney were excellent and he made good decisions in general. He thought outside the box and was very innovative. His vast experience was helpful, and he understood the basics of town government as well as the nuances of each community he serves. He easily identified key individuals to work with him, which was a gift. He knew how to assess the task and put the best group together to complete it.

Immediately upon arriving in Westerly Mr. Rooney was very active in meeting everyone and talking to them, and he continued to be active in the community. He met with various groups to establish communication and was very effective. When covid first hit, he realized they could not shut down completely or they would lose that personal connection. Westerly was one of the few towns that stayed open, but he was also very sensitive to residents who were uncomfortable or at high risk and found ways to safely connect with them. He hired employees who were good at making those personal connections. The executive team interacted together, and their projects coordinated with each other. He effectively overcame the silo mentality that existed when he arrived to create a very interactive group. He empowered Directors to make changes in their department for the good of the organization. Working with him was a wonderful experience.

The Town had been working on their comprehensive plan for ten years when Ms. Pellegrini was hired, and it fell under development services. The Council seemed afraid to make any decisions before adopting the plan, so they created many different committees and bypassed the planning Board. Mr. Rooney held meetings and really listened to the obstacles that the senior leadership team was facing. He identified two members of the Council to bring into the process and helped everyone realize that the planning commission needed a new Chairman. Once the new Chairman was in place, they were able to complete the comprehensive plan. Mr. Rooney is extremely supportive not only to the Council members but to the staff and the public. When residents were abusive in public meetings, he remained positive and did well in his approach to them. Another issue was when some wanted to remove the Columbus statue in town. He kept everyone calm and helped diffuse the situation. The statue remains and everyone is calm.

Mr. Rooney is absolutely customer service oriented, and he has excellent financial skills. To relieve stress, he exercises. When upset, he stays very cool but is direct, so you know what the issue is. Working with him is refreshing as compared to a manager who is passive aggressive and

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J. Mark Rooney

will not tell you what the issue is. He talks to staff about any issues and expects them to fix it but will assist if they are having any trouble. When they need guidance, he breaks down the situation to help them determine how to move forward, rather than taking over. He has an excellent leadership style, most likely from his military career.

Everything in Westerly is controversial. The former HR director blamed Mr. Rooney for something related to covid that was not his fault, everyone in the organization feels that the accusations are unfounded. Nothing in Mr. Rooney's background would embarrass an employer.

Ms. Pelligrini would hire Mr. Rooney and his departure was a significant loss. When Ms. Pellegrini's parents both died in a short time frame, he encouraged her to take time off. He cares about the staff. He is an excellent and dedicated manager.

Words or phrases used to describe Mark Rooney:

- Fearless,
- Extremely dedicated,
- Very loyal,
- His word is his bond,
- Fiscally conservative,
- Compassionate,
- Very willing to mentor staff, and
- Very seasoned.

Strengths: Unifies everyone in one direction, keeps everyone in sync, encourages discussion and working together to accomplish crazy impossible things, excellent leader.

Weaknesses: At times he can expect much and perhaps moves at too fast of a pace. However, you can tell him you need to slow down a little and he acknowledges it. He is just on overdrive most of the time and has an enormous amount to do.

Dyann Baker – Former Finance Director, Town of Westerly, RI 401-348-2548

Ms. Baker reported to Mr. Rooney from 2018 to 2021. Mr. Rooney was financially astute and helped Ms. Baker assimilate to the municipal environment because she came to Westerly from a non-profit organization. He provided good leadership while she worked through the nuances of public finance. He was very supportive of high performing employees.

Finding good talent willing to work in the public sector can be difficult. Mr. Rooney often could not hire the best person for the job because the Town could not pay them what they are worth. He does the best he can within the financial limitations of the organization. His decisions in general are good.

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J. Mark Rooney

Mr. Rooney was very much about change and improvement, and he was a very community-oriented person. He attended community meetings and interacted well with the public. He understood the nuances and tried to understand the concerns and the sticking points. He worked to maintain relationships in the community.

Considering his schedule, Mr. Rooney kept everyone informed to the best of his abilities. He had to be reminded at times, but he really did the best he could. He was stretched even further in Westerly because they did not have a public works director for most of his tenure and he ran that department as well as the Town.

Due to the nature of finance, Ms. Baker and Mr. Rooney met one on one, but he truly helped to resolve any issues. During stressful circumstances he was very fluid, but he also showed great strength. The only time his stress elevated slightly was when his leadership was challenged.

Westerly has had a few controversies, one that involved a lawsuit. Some in the organization may have a different opinion of Mr. Rooney because there are differences of opinions about styles. Some employees may feel put upon because his expectations are high.

Ms. Baker would hire Mr. Rooney, he is a good manager. He did a tremendous job in Westerly, particularly for a person running a town while their family lived in a different state. He worked very hard for their community.

Words or phrases used to describe Mark Rooney:

- Strong,
- Knowledgeable,
- Employee centered,
- Financially astute, and
- Very taxpayer and citizen oriented.

Strengths: Very strong in finance, provides good leadership, supportive of high performing employees, understands when to be hands off and when to be involved with department heads.

Weaknesses: He allows his emotions to get in the way at times. For example, he is very loyal to the organization and staff. He wanted to reward employees with compensation equal to job performance, which was difficult for the Council to approve given the pandemic. As such, there was tension and emotion in the room.

Reference Notes

J. Mark Rooney

Kay Teeter – Former Trustee, Carpentersville, IL 847-894-8804

Ms. Teeter was a Village Trustee for ten years and worked with Mr. Rooney as the Village Manager for five of them. She has served on the Business Development and the Planning and Zoning Commissions since she left the Board.

In terms of job performance, Mr. Rooney was on point. They did not hire him because they wanted people to like him, although he was a nice person. Change was absolutely necessary for Carpentersville. Staff had not been held accountable by the previous manager. Hiring was done based on who you knew, and the previous manager was personally doing some of the work that employees did not know how to do. They conducted an intensive interview process because they needed a change agent who could sustain a high-performance group. They selected Mr. Rooney and he was the right person for the job.

Mr. Rooney came in and mentored some of the employees and they improved so they are still with the organization. Some were already doing well, and he solidified them. When employees left or were not performing, he helped identify the qualities needed for that position, so they hired the right person to replace them. He always did what needed to be done. He made good decisions because he always focused on what was good for the whole and not one single entity.

Mr. Rooney attended every community event and many of the community meetings. When interacting with the public he was very friendly, open and approachable. He greets people with respect and listens to their comments and concerns. He is very good about keeping the Board informed and he meets deadlines.

The departments were not working well together which made community development very challenging. Developers and business owners met with one department and were given a to-do list. When they completed that list, they went to the next step and were given a second list, etc. The back and forth was incredibly frustrating for them. Mr. Rooney helped the departments put a master list together while putting the right staff in place, even if it meant moving employees around. He balanced out the issues and helped the departments work together. When someone wants to do something in the Village, every department that needs to be involved in that particular project is sitting at the table for the very first meeting. It has not only streamlined the process but has made it very customer friendly. The changes are significant and wonderful.

The person who owns the business that employs the most residents would not do any economic development in Carpentersville because the departments gave him grief and the process was not defined. He was very critical of their organization and took his business to surrounding communities. Since the change in the process, he is doing business development in Carpentersville and he speaks well of the City. He has seen the leadership of Mr. Rooney and is now willing to invest in the community.

The public works department had not been remodeled since the 1950's. The plan to remodel it received much pushback from the community, but Mr. Rooney guided them through the process

Reference Notes

J. Mark Rooney

and helped them see the vision. Since the project has been completed, the residents are so excited about the changes, even those who complained in the beginning. The right thing to do is not always the easy thing, but Mr. Rooney can always discern the right thing to do and work in the right direction. He brought the project in under budget because he utilized the staff for the project when he could. With the money saved, he did an expansion and redevelopment of their City Hall which had not been updated since the 1970's. He helped the Board see the possibilities when they could not envision them. Mr. Rooney realizes that investing in the staff is beneficial and helps the organization to be more efficient. The end result has been wonderful.

The Village had never saved for capital purchases and projects before Mr. Rooney was hired. He put money aside every year so that when they need to buy a fire truck or ambulance, or need to paint the water tower, the funds are already available.

The Village had full time and part time firefighters. The part time fire fighters filled in the gaps and are cost effective because they do not require benefits. The full timers try to get rid of the part timers to increase their own pay by demanding that all firefighters have the same education level. Rather than dismissing the part time fire fighters, Mr. Rooney and the Board worked with the part timers to increase their education. An additional benefit is that they are able to step into a full-time position as openings occur. The full timers went public with allegations that Mr. Rooney was against fire safety and claimed he was a detriment to the community. The situation was very controversial but none of what they claimed was justified or accurate. Ms. Teeter is not aware of anything controversial in Mr. Rooney's history.

Ms. Teeter would hire Mr. Rooney. He was a great leader for Carpentersville, he did the job that needed to be done.

Words or phrases used to describe Mark Rooney:

- Driven,
- On purpose,
- Open,
- Futuristic, and
- Visionary.

Strengths: He looks at a situation from both perspectives because he is very objective, but he does have a heart. He sees what changes need to be made and what strengths the organization already has. He was very good at working through the process and provided the Board with enough information to make educated decisions.

Weaknesses: He has a military background and at times can be more focused on the task at hand rather than being warm and fuzzy. He is very personable, but he is also strong willed which is not a bad thing if it is channeled in the right direction. He is sometimes so passionate, and he could be softer when presenting his ideas.

**Reference Notes
J. Mark Rooney**

Dean Argiris – Former Village President, Wheeling, IL 847-845-6990

Mr. Argiris has known Mr. Rooney since 2003. Mr. Arigis was a Trustee when Mr. Rooney was the Manager. Mr. Argiris was an aggressive Trustee who was always suggesting ideas, Mr. Rooney always found ways to accomplish them. They had a great relationship.

Mr. Rooney was a hard worker and a smart person. He was very good and dedicated to his field. He liked challenges, which was a good thing. Each of the Trustees has a different personality and he worked well with all of them.

When hiring personnel Mr. Rooney made good choices and they were happy with his selections. His decisions in general are good, he was very focused on the job. He answered the phone, even late at night on the weekend, and communicated well. He quickly supplied any information they requested. He managed 245 employees, worked with the unions and managed the TIF districts, which was a significant undertaking. He worked seven days a week and did well.

Because of the climate in Illinois, Mr. Rooney was always looking for ways to save money and find new revenue sources. He was always trying to keep businesses in the community and was really good at growing the community and maintaining services.

Mr. Rooney attended City events and other events like Chamber meetings. They held some fundraisers, and he was always in attendance. When in the community he has a great personality and the gift of gab. He can speak to anyone.

Keeping the Board informed was a mandate and Mr. Rooney did well. The elected officials created the vision, Mr. Rooney made sure the vision was set forth in the organization. He knew how to address hair brained ideas and suggested better ways to get to the end result. He listened and researched options. The residents gained a sense of pride by his example.

Schools, libraries, and parks were against TIF districts but the only way the Village could fund economic development was to create them. Mr. Rooney met with supervisors from the taxing bodies to explain why the district was important and how it would benefit their organization. He assured them that it was the right choice because he knew that they all had to work together. They now have five TIF Districts. One expired after lying dormant for twelve years because of the past administration. Mr. Rooney declared a surplus to expand the District, which is now bringing in some nice revenue. He was very creative.

During Mr. Rooney's tenure, they had to lay people off and teach employees to multitask. The situation was challenging but he was able to lead the organization while keeping the funding in place and their bond rate consistent. They received financial awards during his tenure. He was creative in refinancing the bond debt. He saved millions by changing from a 5% interest rate to a 2% interest rate. He is very skilled with finances and was very instrumental in what they were able to accomplish.

Reference Notes

J. Mark Rooney

Mr. Rooney is visionary and always looks ahead. He is very transparent. He has a good head on his shoulders. If he has a Board who supports him and a good team to work with, he will thrive.

Before he came to Wheeling Mr. Rooney was involved in a controversial situation involving the union members who were backed by lobbyists. He did what was right for the community. He left Wheeling after a new Mayor was elected who decided to go in another direction. It was based on politics and not on Mr. Rooney's job performance. People were happy with him, and it was unfortunate that politics interfered.

Mr. Argiris would hire Mr. Rooney, he is a good Manager.

Words or phrases used to describe Mark Rooney:

- Good personality,
- Military background,
- No nonsense approach,
- Leads by example,
- Fun to be with socially,
- Creative, and
- Innovative.

Strengths: Good personality, separates the politics and dealt with each of the seven board members well. Good work ethic, just a great Manager.

Weaknesses: In Wheeling he was a bit of a micro manager. However, Mr. Argiris knows employees in Carpentersville, and they have confirmed that Mr. Rooney has improved in this regard.

Mr. Pat Horcher – Village President, Wheeling, IL 847-331-4234

Mr. Horcher was a Trustee in Wheeling when Mr. Rooney was selected as the Village Manager in 2006. Mr. Rooney was excellent and always did a great job. At least two of the employees he hired are still working for the Village. He explained every decision he made, and they all made sense. Working with him was very easy.

The Village went through a big growth spurt before the economy tanked. Mr. Rooney definitely maintains an organization, but he was able to be innovative because of revenue streams from the growth spurt. He coordinated the construction of a new Village Hall, Fire Station, Public Works Building, and turned the old Village Hall into a dedicated Police Station. He definitely kept the Village moving forward.

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J. Mark Rooney

Mr. Rooney was always at community events like the 4th of July celebration, but meeting with the general public was not his responsibility, Mr. Rooney primarily met with developers. He became involved when the job progressed to the point that it required coordination with the Village Attorney, Engineers, the developer's attorneys and the engineers.

Mr. Rooney always presented every option rather than just highlighting those that might be favorable to one side of the board or the other. He kept them very well informed. He led the project to buy a parcel of property that is now being developed as the Village Town Center.

When they began to feel the loss of tax revenue after the economic downturn, Mr. Rooney had to reprioritize departments, functions and services. He looked at employees who were close enough to retirement that they could buy out. He managed the Village during a volatile time and did very well. He always meets deadlines.

The Village had a fueling station with gas pumps and tanks. The Park District uses the station and pays for the gas. The Board decided that the Park District should contribute to a new building. Mr. Rooney sent them a memo outlining this idea and they were not happy about having to contribute. Even though Mr. Rooney was only doing as he was instructed, the Board declared he had overstepped his bounds and asked him to apologize to the Park District. Mr. Horcher thought it was absolutely wrong to ask him to do so, but Mr. Rooney understands the chain of command and that he needed to make the apology. He is honorable and did his job.

Mr. Rooney has not been involved in anything controversial. Over a period of several years a developer was given over 10 million dollars in TIF money, which put the Village in a difficult situation because they have maxed out the funds but did not receive the benefits they had hoped to receive. At the time the Village President was the Vice President of the bank who financed the developer on the other end and another Trustee backed the developer no matter what. On a day that this developer was coming before the Board to ask for more funds, they discovered that the developer had allowed his associates to dump material on a piece of Village owned designated wetland, of up to eight feet of debris. The Board had to hold an emergency executive session. The Trustee who backed the developer stated that she did not understand why they were making a federal case out of it. Mr. Horcher responded that it was a federal case as the land was federally owned wetland. The Trustee convinced the Board to give the developer more money anyway, which Mr. Rooney was opposed to. He pointed out that they were not receiving much value per unit being built. This situation factored into his departure from the Village and was part of the reason that Mr. Horcher resigned from the Board.

Mr. Horcher would hire Mr. Rooney in a heartbeat and really enjoyed working with him. Mr. Rooney's information was always accurate, and he relayed all the options even when they were not in the best interest of the community. He implemented whatever the Board decided.

Reference Notes J. Mark Rooney

Words or phrases used to describe Mark Rooney:

- Dedicated,
- Loyal,
- Honest,
- Diligent, and
- Honorable.

Strengths: Very thorough with his research, absolutely committed to the chain of command – his job was to give the Board the facts and then implement the decision made. Working with him was very simple.

Weaknesses: He trusted people.

Oneida Fehring – Administrative Assistant to Police Department and Village Manager, Carpentersville, IL 224-293-1660

Ms. Fehring met Mr. Rooney in 2013. She has worked for the Village since 1999 and is the administrative assistant for the police department. After his administrative assistant left, he began utilizing her as his administrative assistant, too, until he left in 2018.

Mr. Rooney was tough, but fair. He was the best Village Manager they had during her tenure. He made good decisions when hiring and likes to promote from within if he found the talent. He made good decisions in general.

The Village was very rundown with many potholes when Mr. Rooney was hired. She never would have moved into the Village at that time but with the upgrades and changes that he introduced, and she would gladly move into town. He maintains operations at a high level.

Mr. Rooney was often out in the community and was very friendly with residents. He was always happy and shook their hands. When residents called, he answered the phone and spoke to them. He was very involved in the community.

Even though Ms. Fehring was an admin, Mr. Rooney always treated her as though she was part of the senior staff. His leadership was exceptional. All department heads did their best to please him, and whatever it took to make sure the organization is running smoothly and well. He had good financial skills and was very responsive.

Controversy always exists in municipalities and people do not always agree, but those who are critical of Mr. Rooney do not always see the whole picture. Ms. Fehring does not believe that anything in Mr. Rooney's background would concern an employer. People did not complain

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J. Mark Rooney

about Mr. Rooney to Ms. Fehring because she came to his defense, but she acknowledges that sometimes union employees were unhappy because they did not get their way.

Ms. Fehring would hire Mr. Rooney and enjoyed working with him, he is excellent. The town really turned around through his leadership. When he was walking to her office, he spoke to people on the way to find out how their day was going. He was very involved in City Hall. He was with Carpentersville longer than any previous Manager and was very, very fair. An employee in finance told Ms. Fehring she was very grateful to him because he gave her the opportunity to prove herself. He offered a position in payroll to another employee who did data entry for the police department, and it worked out very well. He encourages talent and makes sure that employees grow within the organization. He is fantastic.

Words or phrases used to describe Mark Rooney:

- Fair,
- Great leader,
- Good natured, and
- Great leadership skills.

Strengths: Leadership, knows how to lead his departments heads. The Village ran so much better and comradery between departments was better than it ever has been.

Weaknesses: When people do not follow orders, he calls them into his office though this does not happen often nowadays.

Kathy Lamkin – Former Human Resource Director, Carpentersville, IL 630-464-4690

Ms. Lamkin does Human Resource consulting. Another manager recommended her to Mr. Rooney, and they worked together from September 2015 to January 2017.

Overall Mr. Rooney had an excellent job performance. He was extremely analytical. He was hired to help Carpentersville from a budget perspective and did an excellent job. He was a good match for the Village at that time.

Everyone makes a mistake or two, but Mr. Rooney made good hiring decisions overall. He made great decisions for the organization. From Ms. Lamkin's perspective in Human Resources, she would have liked him to think more about the individual employee, but she understands that the Manager has to look at the big picture.

Mr. Rooney is definitely innovative. He came up with many ideas, some of which Ms. Lamkin questioned, but they almost always worked. If someone does not like change, they might be

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J. Mark Rooney

frustrated working for him because he always has new ideas to try. When employees do their work, he is good to them. If they do not, they will know they are not meeting expectations.

Mr. Rooney attended Board and staff meetings. He kept Ms. Lamkin informed most of the time, but she was only in the office three days a week, which made it challenging. When she felt she should have been informed about something, he always listened. He was always responsive.

During a police department investigation, they had to decide how to handle it to keep the employee from filing charges. Mr. Rooney asked some questions and helped them determine the best route. He used the newspaper test, meaning he asked them what each decision would look like on the front page of the newspaper.

The Fire Chief was investigated and rather than being fired, he was given the option to retire. He then ran for Mayor and won which created a very uncomfortable situation. This Chief grew up in the Village. Ms. Lamkin gained a great deal of respect for Mr. Rooney during this time. It was a difficult decision and asking for the Chief's resignation could have been the end of Mr. Rooney's career. Even so, he did what was right for the organization. Also, there was a situation about a disagreement that ended up in the paper. Ms. Lamkin does not know much about it, except that Mr. Rooney was exonerated. In Illinois, Administrators do not hire their department heads. Mr. Rooney will do better if he has control over who his department heads are.

Depending on the culture, Ms. Lamkin would hire Mr. Rooney. He is not a good fit for her client that is extremely focused on doing everything for the employee even if it means changing the rules. To be clear, Mr. Rooney was fair to employees and offered benefits that were cost neutral to part timers, but he did not bend over backwards to make sure that everyone gets what they want. In general, she recommends him and enjoyed working with him.

Words or phrases used to describe Mark Rooney:

- Smart,
- Creative,
- Wants to do the best for the organization,
- Loyal, and
- Assertive.

Strengths: Extremely smart, analytical, understands the politics, keeps the Board informed, handled very sensitive issues including union negotiations or investigations, knew what to tell the Board without getting them involved in the minutia.

Weaknesses: He can be pretty business oriented and some who are sensitive might not think that he cares as he is just not touchy feely. While it did not bother Ms. Lamkin, she had hoped he would open up a little more.

**Reference Notes
J. Mark Rooney**

Mike Angus – President, Chicago Area Mountain Bikers, Carpentersville, IL 630-804-9521

Mr. Angus and Mr. Rooney met in 2013. They worked together on projects for the community which mainly consisted of identifying land options and approaching owners to see if they were amenable to using the land for a bike park. The park they envisioned is now in construction.

They participated in eight formal meetings together. When issues occurred, Mr. Rooney was very quick to address them, and he even visited the park to see the progress. He was very supportive. He is a great person and did everything that they asked of him.

Mr. Rooney was open to the idea of a bike park when many people were negative, and the resulting project has improved the Village substantially. When Mr. Angus had a question Mr. Rooney either responded quickly or delegated to the staff if he was busy. He was very good about keeping others informed.

The park had an issue with gangs and graffiti, Mr. Rooney was quick to offer police support and City staff to clean up the graffiti. If they had leftover rubble or trash, Mr. Angus called the City. Mr. Rooney swiftly took care of any issue.

Mr. Angus had limited exposure to Mr. Rooney but is not aware of anything controversial that is related to him. Mr. Angus would hire Mr. Rooney, he did very well in Carpentersville. They would not have the bike park without his efforts, he was very supportive.

Words or phrases used to describe Mark Rooney:

- Open minded,
- Direct,
- Caring,
- Supportive,
- Responsive, and
- Collaborative.

Strengths: Can make decisions and does not beat around the bush, he deals with issues.

Weaknesses: Employees have said that he can be pretty direct, but Mr. Angus has not witnessed it firsthand.

Prepared by: Lynelle Klein
Colin Baenziger & Associates

CB&A Internet Research

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

Daily Herald (Arlington Heights, IL)

June 15, 2023

Round Lake Beach administrator out

Author/Byline: Mick Zawislak

Round Lake Beach will be looking for a village administrator after officially parting ways with **Mark Rooney**, who had been on the job for less than two years. The village board during a special meeting Monday approved a separation agreement with **Rooney**, who started Oct. 4, 2021, as the first new village administrator in 28 years. **Rooney** resigned for undisclosed personal reasons effective May 26, per the agreement. Details of his departure were not made public. The agreement reads the parties wanted to resolve differences amicably and agreed not to "disparage or denigrate" the other either orally or in writing.

Rooney is leaving in good standing, which will be acknowledged by the village if any inquiries are made by potential employers, according to the agreement. **Rooney** will be paid for all unused accumulated vacation and get \$10,000 less withholdings and deductions. The village will pay for his family COBRA health insurance premium, if he chooses that coverage, for the month of June. **Rooney** was being paid a base annual salary of \$193,357, with total compensation of \$224,225.

Rooney had 25 years of experience in suburban government, including stints in Highwood, Wheeling, North Chicago and Carpentersville. He returned to his longtime home in Highwood after serving three years as town manager in Westerly, Rhode Island, a tourist town. He replaced Dave Kilbane, who retired in April 2021 after 28 years.

At the time **Rooney** was selected, officials said the village was looking for a highly experienced manager who understood state and county government and who had the experience to sustain and build activity along Rollins Road, its main business corridor.

An internal and external search for a replacement will be conducted, according to the village. "Both myself and the village board are extremely confident our outstanding staff is more than capable of handling this change in structure while we seek an experienced village administrator to lead us into the future," Round Lake Beach Mayor Scott Nickles said.

Internet – Newspaper Archives Searches

J. Mark Rooney

(Articles are in reverse chronological order)

[CB&A Note: Only the information pertaining to Mr. **Rooney** is included.]

<https://biz.craigslist.net/illinois-has-spent-nearly-5-billion-in-pandemic-funds-heres-how-some-suburbs-used-it/>

August 20, 2022

Illinois has spent nearly \$5 billion in pandemic funds. Here's how some suburbs used it.

by Shawn Johnson

In Illinois, more than \$14 billion is expected to be divided and spent over the next four years from the American Rescue Planning Act, among state, county and local governments. The amount is about 4% of the \$350 billion state and local Financial Recovery Fund aid package approved by Congress and President Joe Biden in 2021. The funds were intended to stabilize government budgets, which could experience revenue deficits related to the pandemic, as well as operating expenses to maintain government services during the pandemic. According to a recently released report by the US Treasury Department outlining the first year of ARPA spending across the country, government agencies in Illinois have so far spent nearly \$5 billion on a wide range of initiatives and projects. But experts from some government finance organizations have limited details about how that money was spent and its effectiveness.

Round Lake Beach officials last year spent \$53,500 received from the American Rescue Plan Act on a COVID-19 vaccination incentive program for their employees.

Village manager **Mark Rooney** said 63 of the city's 73 full-time employees received an incentive of about \$1,000 "because it wasn't a mandate."

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

Herald (IL)
October 21, 2021

Top Priority is Economic Development

Author: Mick Zawislak

Round Lake Beach has a new full-time village administrator for the first time in nearly three decades. **Mark Rooney** has 25 years experience in suburban government, with stints in Highwood, Wheeling, North Chicago and Carpentersville. He assumed full-time duty in Round Lake Beach on Oct. 4 and was sworn in Monday to succeed Dave Kilbane, who retired in April after 28 years.

Rooney returned to Illinois and his longtime home in Highwood after three years as town manager in Westerly, Rhode Island, a tourist town known for its beaches and a summer population of 52,000. Round Lake Beach Mayor Scott R. Nickles said it was a hard decision but **Rooney** emerged from three highly qualified candidates. "We made our decision based on some of the issues facing our village now and in the future," Nickles said. "The future is our economic development and filling our empty voids," he said. The village doesn't have a lot of space for new development, making infill projects a key, he added.

Handling various intergovernmental agreements, continuing cooperation with surrounding communities and hiring a full-time finance director are other considerations moving forward, according to Nickles. **Rooney's** annual base salary is \$175,000, with a \$6,000 annual car allowance. He must give the village six months' notice if he voluntarily resigns within the first three years and 60 days' notice after that. As an "at-will" employee, **Rooney** can be fired at any time with or without cause.

Rooney's team and leadership approach was cited as a factor in the choice. He noted the stability created by Kilbane and long-term former mayor Rich Hill. "I want to build on the success the village has had," **Rooney** said. In the bigger picture, the Round Lake-area communities work together on regional decisions and understand the economies of scale, he added. The village offered **Rooney** the job on Sept. 4. Days later, he resigned as Westerly town manager. He'd been hired there as interim manager in May 2018 and given the full-time job that August.

Rooney served in the Army for 31 years, including seven on active duty. He retired as a lieutenant colonel in 2014. He was a staff assistant to the late Sen. Paul Simon before being hired as Highwood's first village administrator in 1996. In 2003, **Rooney** was named assistant village manager in Wheeling serving three years before being named manager. He left in 2009 for a brief stint in North Chicago before being hired in Carpentersville. He served seven years in Carpentersville before the village board in January 2018 voted to accept what it considered to be **Rooney's** "voluntary resignation," saying he had stopped reporting for work.

Rooney sued the village, claiming he was placed on involuntary leave and then fired without the severance and benefits he was owed. The parties settled in 2020 for \$220,000. Former Buffalo

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

Grove Village Manager Bill Balling, who served as interim administrator in Round Lake Beach, said the village was looking for a highly experienced manager who understood state and county government and who had the experience to sustain and build activity along Rollins Road, its main business corridor. "I think we're setting the table with the management structure we have in place," Balling said. "We think we're getting the right person in place to mature the organization" and build on successes, he added.

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

The Westerly Sun (RI)

Sep 15, 2021

Rooney still on the job in Westerly ... for now

By Dale P. Faulkner

WESTERLY — If you're not sure who's running the town, you're not alone. As it turns out, according to town officials, Town Manager **J. Mark Rooney**, who on Sept. 9 announced his intention to resign, will stay on for at least the rest of this week. But on Monday, the Town Council did not discuss **Rooney's** status during the public portion of its meeting, even though he had already tendered his resignation. The council did, however, go into a private executive session to evaluate **Rooney's** job performance.

Rooney, who attended Monday's council meeting and participated in the executive session, declined to answer questions for this article, saying he had been asked by the council to refrain from making public comments. Following the executive session, Town Council President Sharon Ahern announced that the council had not taken any votes pertaining to **Rooney's** job performance or on the other topics listed on the agenda for the private session.

On Sept. 9 Ahern acknowledged that she had accepted **Rooney's** resignation and said he had discussed interest in staying on to assist the council with the transition to a new town manager. At the time, Ahern said she anticipated discussing **Rooney's** resignation and offer to stay on for a period of time during the council meeting on Sept. 13.

On Tuesday, Ahern said that **Rooney** was continuing to work for the town. "**Mark Rooney** is still the town manager as of today," Ahern said. "The Town Council has a plan and a firm leadership agenda and because, as you know, we were in executive session under personnel, we were advised by Town Solicitor [William] Conley that we could not discuss any details at this time, but action will be taken on Monday."

When asked whether **Rooney** would continue on for the rest of this week, Ahern initially said she was uncertain she could answer, but eventually said, "Yes. I don't want people to think that the town is without leadership. It most certainly is not."

Ahern said she had communicated with the chairpersons of some of the town's boards and commissions. "I have reached out to some of the board chairs and told them 'Please rest assured we have a plan' so no one thinks we are in an era of disruption," Ahern said. While the departure of a town manager can be "disturbing," Ahern said the position in Westerly and other municipalities tends to be one with a high turnover rate.

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

The Westerly Sun (RI)

August 3, 2021

Town Council Considers Ways to Balance Transfer Station Budget

Author: Dale P. Faulkner

WESTERLY — A new \$50 annual transfer station fee would be charged to all dwellings in the town, and the cost of town-issued orange trash bags would increase by \$1.00 under a plan being considered by the Town Council. The fee and bag-cost increase were some of the options developed by Michael Serra, assistant superintendent of the Department of Public Works, as a means to reduce the transfer station's reliance on the annual municipal budget to balance its financial ledger. The transfer station is designated as an enterprise fund that many officials say should be financially self-sustaining based on user fees. The Board of Finance, during deliberations on the municipal and enterprise budgets last spring, asked the Town Council to study the transfer station's financial performance, noting its increased reliance on funds from the town budget rather than fees charged for use of the facility to balance the facility's annual budget. The transfer station is relying on \$488,571 from the annual budget in the current fiscal year to balance its \$2.96 million budget. In return for the \$50 annual fee, which officials said would likely be included with municipal tax bills, property owners and residents would receive a permit that would grant entry to the transfer station.

Serra and Town Manager **J. Mark Rooney** discussed the recommendations with the Town Council during a workshop meeting on Monday. **Rooney** said use of funds from the municipal budget has increased in recent years because expensive equipment used at the transfer station has required replacement. He also reminded the council and residents that the town no longer receives money for recyclable items because of the decline in the international market for recyclable items. The recommendations come as Rhode Island Resource Recovery Corporation, which operates the state landfill in Johnston, which receives the town's trash, is increasing its fees to municipalities. In the current fiscal year, the corporation's fee increase to the town is estimated to result in a 4% overall increase from \$1.049 million to \$1.086 million and an estimated 13% overall increase in 2022-23 to \$1.22 million. Additionally, the vendor that supplies the orange bags is increasing the cost of the bags by 15%. Members of the council stressed that the recommendations they are considering are intended to mitigate reliance on the annual town budget. They also noted that ultimately residents all pay for the transfer station either through taxes that support the municipal budget or fees imposed for use of the facility. "We're not trying to make money. What we're trying to do is close the gap. We need to figure out how we can break even every year," Councilor Suzanne Giorno said. Councilor Caswell Cooke Jr. said he supported the proposed new permit fee and increase to the cost of trash bags, and said Serra and **Rooney** should be given authority to increase fees when the town is facing increases in the fees charged for use of the state landfill. The council is expected to consider an ordinance that would establish the permit fee and trash bag cost increase in the future. **Rooney** and Serra agreed to study a proposal by Councilor Karen Cioffi to eliminate use of the town-issued trash bags. Cioffi said the bag system would no longer be necessary if the permit fee is adopted.

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

NPR Radio (USA)

August 22, 2021

Rhode Island Braces for Tropical Storm Henri

Author: Susan Davis

Susan Davis speaks with **Mark Rooney**, town manager of Westerly, Rhode Island, about how the town is planning for Tropical Storm Henri.

SUSAN DAVIS, HOST:

Henri is already dropping rain on New England and hitting the coast with high winds. The tropical storm spent much of yesterday as a hurricane and is expected to officially make landfall this afternoon. **Mark Rooney** is the town manager of Westerly, R.I., and joins us now. Thanks so much for taking the time.

MARK ROONEY: You're welcome.

DAVIS: Other officials in the region today say they're expecting something akin to Superstorm Sandy. Is that what you're preparing for?

ROONEY: That is exactly what we're preparing for because we're - with the high tide of the full moon - causes about a 3-foot rise naturally, and then the 3 to 5 feet of storm surge could be very detrimental because it'll breach the dunes and bring sand and water inland. And that - it leaves a lot of sand on the road and causes a lot of infrastructure issues.

DAVIS: So what kind of preparations are you making, and what have you been telling your constituents about how to prepare for the storm?

ROONEY: Well, we've issued a shelter-in-place at about 9:30 this morning, and we had a temporary - or a recommended evacuation of the area that is most prone to the storm surge. And we're - at this time, we're closing off some of the access roads into the most prone flooding areas on - along the shore.

DAVIS: Have folks been listening to the evacuation order? I know, oftentimes, people decide to stick around even when they're told to leave.

ROONEY: For the most part, they did. The hotels, I think, had check-out this morning in the affected region. And so some of those visitors did leave the cottages or their Airbnb. But we do have - we still continue to have people that come in to the area because they see the Weather Channel. But we do have police cars advising people to leave those areas.

DAVIS: Can you talk us through the preparations that you've made and what you're telling your constituents about how to weather the storm?

ROONEY: Well, we've issued a shelter-in-place to every resident of the community. And in the heavily impacted areas, we have police blocking access into those areas and escorting people out that have gotten in there to do observation or - we had surfers earlier in the day. So those all have been moved out of the area.

Internet – Newspaper Archives Searches

J. Mark Rooney

(Articles are in reverse chronological order)

DAVIS: What's your biggest concern right now in terms of safety?

ROONEY: Downed power lines. I saw some preemptive shutdowns of gas lines in the beach areas to preclude any problems to the system overall. And they do have crews that will work to restore power as long as the winds are below 35 miles an hour. So they have been working, even in the storm, to restore power. We've got scattered power outages but not widespread.

DAVIS: It's been nearly 30 years since a storm of this measure has affected the New England area. Do you think that the local area is more prepared for a storm like this now?

ROONEY: The communication systems are much more robust now in the coordination between the fire district, national grid and the town, and then we have state assets, as well. That cooperation and interdepartmental level of training is there, and we find that the fire department - they have been staffed up and very responsive this morning to any trees on roads and opening them up within 30 minutes.

DAVIS: All right. That's **Mark Rooney**. He's town manager of Westerly, R.I. Thank you so much for your time.

ROONEY: You're welcome.

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

The Westerly Sun (RI)

July 24, 2021

Westerly, Former HR Director Settle Lawsuit; Town Admits No Guilt

Author: Dale P. Faulkner

WESTERLY — A lawsuit filed against the town by its former human resources director claiming she faced illegal retaliation and that her rights under whistleblower and family leave laws were violated has been settled out of court for \$98,500. The four-count lawsuit filed in U.S. District Court in Providence in December on behalf of Nancy M. Markey, who worked as human resources director for about two years, claimed Town Manager **J. Mark Rooney** violated her rights as a whistleblower and rights she had under state and federal medical leave legislation, as well as rights she had under the federal Family First Coronavirus Response Act.

Terms of the settlement agreement were reached after both sides participated in a voluntary mediation session aimed at avoiding a trial. The agreement does not constitute an admission of wrongful or unlawful acts by **Rooney** or the town, according to terms of the agreement. The Town Council voted unanimously to approve the agreement in late June but did not announce the vote until Monday because the town's lawyers advised not announcing the agreement until it was signed by all parties, said Town Council President Sharon Ahern on Monday.

Lawyers for Markey and the town said the agreement reflected give and take by both sides. "Both parties compromised significantly. I think it's in the best interest of the taxpayers," said Matthew Oliverio, the lawyer who represented the town in the case. By settling early, Oliverio said the town avoided the cost of additional legal representation, which would have started to mount if the case was decided by a judge, regardless of whether the town won the case.

Employment law claims generally involve economic damages related to the claimant's salary and livelihood and whether they found alternative employment and at what level of compensation, as well as an analysis of economic damages including pain and suffering, said Richard Sinapi, Markey's lawyer in the case. Potential settlement agreements are also based, Sinapi said, on clients' risk preference. "My client felt it was a fair settlement and it was acceptable to the town as well and that was the compromise that was reached," Sinapi said. Markey is now working for a school district and is "doing very well," Sinapi said.

According to the agreement, the settlement payment was broken into three components: \$32,400 for unpaid wages, less applicable deductions and withholdings; \$32,400 for non-economic damages (such as pain and suffering); and \$33,700 for legal fees and costs. Markey claimed, in the lawsuit, that **Rooney** retaliated against her after she told him she planned to report violations of COVID-19 protocols she observed in Town Hall in March 2020 as the pandemic started to take hold and wreak havoc throughout the country.

The retaliation continued, the lawsuit alleged, when the town unsuccessfully contested and appealed Markey's application for unemployment benefits. The town argued, according to

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J. Mark Rooney

(Articles are in reverse chronological order)

Markey's lawsuit, that Markey had been terminated for insubordination and failure to follow leave and attendance policies, but a state Labor and Training Department appeal-hearing officer found Markey had followed routine steps for leaves she took and that there was no evidence of intentional wrongdoing. **Rooney** did not return a telephone message seeking comment for this article but typically does not discuss matters involving employees.

Internet – Newspaper Archives Searches

J. Mark Rooney

(Articles are in reverse chronological order)

[CB&A Note: We have spoken to the Town about this matter and, we are confident the suit described below is without merit.]

Westerly Sun, The (RI)
February 7, 2021

Westerly's former HR chief sues the town

Author: Dale P. Faulkner

In federal suit, Markey alleges she was fired after blowing whistle on alleged violations

It was the early days of the COVID-19 pandemic last March, and tensions were running high, including on Broad Street in Town Hall. Workers were, allegedly, pushing for permission to work from home and asking for the building to be sanitized and for the public's access to be limited.

According to a federal lawsuit filed recently against the town by Nancy M. Markey, its former human resources director, it was against this backdrop that she was fired by Town Manager **J. Mark Rooney** in retaliation for informing him she planned to report alleged violations of COVID-19 protocols to state and federal agencies. It was, the lawsuit asserts, a violation of both federal and state family medical leave protections.

The lawsuit also describes the mood in Town Hall when two workers tested positive for the coronavirus and detailed concerns with how **Rooney** was handling the pandemic, including whether employees would be informed if other employees tested positive for the virus. Many of the events depicted in the lawsuit occurred prior to Town Hall eventually being closed for a special cleaning and before an appointment-only policy was put in place during the first surge of the virus.

Rooney and Town Attorney William J. Conley Jr. declined to comment or answer questions for this article, citing personnel policies of not commenting on pending litigation. The town has yet to file a formal response to the lawsuit, which was filed Dec. 22 in U.S. District Court for the District of Rhode Island in Providence.

The lawsuit also alleges that **Rooney** failed to quarantine himself after experiencing symptoms of the virus and getting tested and that he ordered Markey not to tell anyone that he had been tested. Other accusations made by Markey include that **Rooney** initially failed to inform her that a Town Hall worker had tested positive for the virus, despite **Rooney** having asked Markey to handle employee COVID-19 issues, that **Rooney** criticizing the state's handling of the virus and that **Rooney** swore at Markey on one occasion.

Rooney and the town are named as defendants in the lawsuit, which contends that **Rooney** retaliated against Markey when he put her on administrative leave the day after she sent him an e-mail stating her intent to complain to state agencies about the town's alleged failure to comply

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

with COVID-19 executive orders issued by Gov. Gina Raimondo. Markey worked for the town from October 2018 until she was removed from her position in May following her placement on administrative leave in April. The retaliation continued, the lawsuit alleges, when the town unsuccessfully contested and appealed Markey's application for unemployment benefits.

"... The director of the Rhode Island Labor and Training Department issued a decision that [Markey] was entitled to unemployment benefits because the investigation conducted by [the department] failed to show evidence of intentional wrongdoing" by Markey, the suit asserts.

The town appealed the director's decision, arguing that Markey had been terminated for insubordination and failure to follow leave and attendance policies, but the appeal-hearing officer found Markey had followed routine steps for leaves she took and that there was no evidence of intentional wrongdoing. "The [hearing officer] further found that the alleged insubordination was centered on disagreement over the handling of COVID-19 protocols that eventually led to her termination, which did not constitute misconduct in connection with the workplace," the lawsuit states. A second appeal by the town to stop Markey from receiving unemployment benefits also failed.

Markey's Family Medical Leave Act claims stem from leaves she took in March and April. The lawsuit also alleges Markey's rights under the federal Families First Coronavirus Response Act were violated when she was placed on administrative leave after taking a medical leave to await the results of a COVID-19 test.

The termination of her employment also amounts to a violation of Markey's rights under the state Whistleblowers Protection Act, according to the the suit, which alleges she was fired for filing complaints with Raimondo's office and other state agencies. The lawsuit seeks unspecified back and other pay or reinstatement of Markey's position, compensatory and punitive damages, as well as attorneys' fees and court fees.

Richard Sinapi, Markey's lawyer, said the damages that will be sought had not been calculated but would be based on lost wages and benefits and on the impact of the termination on Markey's reputation. "... And there is some emotional pain and suffering that is associated with an abrupt termination from a publicly appointed position where you are trying to do your best job and you get the rug pulled out from under you," Sinapi said.

In July of 2019 Markey received an "exceeds expectations" job performance review from **Rooney** and her pay was increased from \$85,000 per year to \$90,125, according to the lawsuit.

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J. Mark Rooney

(Articles are in reverse chronological order)

Brattleboro Reformer (VT)

February 1, 2021

R.I. COMMUNITIES OFFER VACCINE

Bennington Banner

Cities and towns are administering a limited number of COVID-19 vaccines to residents ages 75 and older. The Rhode Island Department of Health announced Thursday that they could get vaccinated. Many appointments filled up quickly. Each city and town has been allocated a certain number of doses.

In Westerly, most of the people who were called were selected using the municipal voter roll. Their names were sorted randomly using the last four numbers of their phone numbers, Town Manager **J. Mark Rooney** told the Sun.

Some of the 34 housing authority and senior center individuals were not taken from the voter list in order to include others who might not be registered to vote. "We tried to get across the demographic as best we could," **Rooney** said.

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

Westerly Sun, The (RI)
January 27, 2021

Progress made on Westerly rights of way

Author: Dale P. Faulkner

Council lauds **Rooney**'s efforts to clean up beach access pathways

Two-dozen rights of way that provide access to the shoreline have been surveyed and many cleared and marked with granite posts under a program directed by Town Manager **J. Mark Rooney** at the request of the Town Council.

The work was performed in conjunction with development of the municipal Harbor Management Plan. An interim version of the plan, mostly focused on moorings, was adopted by the council in 2018. The council thanked and praised **Rooney** Monday following his presentation on the work that was accomplished by a professional land surveyor and public works personnel with input from Lisa Pellegrini, director of Development Services, Julia Beasley, interim Recreation Department director, and Kimberlie Rayner- Russell, assistant harbormaster.

Rooney also reviewed four potential new sites around Winnapaug Pond that could be formally designated as municipal rights of way in the future. The four sites have been used historically but are not listed on town documents as designated rights of way.

Councilor Caswell Cooke Jr., who serves as executive director of the Misquamicut Business Association, said residents and business owners have asked for formal access points to the pond for decades. "It's something that people have really talked about since I started down at the beach more than 20 years ago, and it never happened," Cooke said.

One of the proposed new rights of way to the pond is at the end of Terrace Avenue, where **Rooney** said officials hope to create a launch area for small watercraft. The other three proposed sites are all off Atlantic Avenue.

Rooney also reviewed photographs of the 24 rights of way that were surveyed. The photographs depicted clearing and sturdy granite posts that officials are hopeful will mark the paths to the shoreline indefinitely and stop a pattern of rights of way becoming overgrown and their location and status as public unclear. Officials are also seeking permission and grants from the state to install kayak and canoe racks at some of the rights of way, **Rooney** said.

Pellegrini said officials hope a map depicting the rights of way can be added to the Harbor Management Plan. "To make it easy for the public to just flip through the plan and see where the rights of way are," Pellegrini said.

Rooney assured residents that rights of way to the shoreline have been a priority in recent years but said the work is time-consuming. "I would ask the public, again, for a little bit of patience ...

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

we are, as the council has promised, moving on the rights of way. They have not fallen off ... the staff has worked on it. I want the public to understand that it's not that they were ignored," **Rooney** said.

Councilor Christopher Duhamel and other councilors joined with Cooke in praising **Rooney's** work. "**Mark** is a great asset. He's really made this happen and he's calmed a lot of battles on this," Duhamel said.

Prior to **Rooney's** presentation, the council reviewed proposed language changes to some of the rights-of-way descriptions in the Harbor Management Plan. As part of the review, the council agreed to strike proposed language that would have stated that public parking would be added adjacent to the Waters Edge Road right of way in Watch Hill. Council President Sharon Ahern said the council had received numerous written comments critical of the proposed language on parking. Residents and others who participated in the meeting remotely were critical of the decision, saying it was premature and that parking was needed at the right of way.

A lawyer for the Watch Hill Fire District and the Watch Hill Conservancy, Gerald Petros, questioned proposed new language in the plan related to Fort Road in Watch Hill. Petros said the road is not a public road and that a lawyer working for the town had previously reached the same conclusion. References to Fort Road as a right of way to the shoreline are unnecessary, Petros said, because the fire district and conservancy have demonstrated commitment to allowing public access to Napatree Point.

Anthony Palazzolo, who owns property in the town, asked the council to study the Fort Road question more closely and raised questions about the legal opinion cited by Petros.

Ahern asked residents and other interested citizens to submit comments to the council prior to Feb. 22 when she said the council would resume a workshop meeting on the rights of way section of the Harbor Management Plan.

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

Westerly Sun, The (RI)
November 19, 2020

Westerly councilors praise town staffers for road work

Author: Dale P. Faulkner

Duhamel: Recent work on infrastructure, Duhamel says, has been completed quickly

Members of the Town Council are praising the municipal Engineering Department and town manager for their work on projects paid for with a \$15 million bond approved by voters in 2018. With the bulk of the bond funds spent or committed, long-serving council members say the work surpasses anything they had seen before. Work under previous road bonds of \$6 million in 2014 and \$6.5 million in 2010 was often slow to proceed.

"I'd like to go back to 2018 when the electorate approved the \$15 million bond. I thought it was insurmountable. How could we ever keep up with that? How could we get it all done? But you made it happen," said Town Council President Christopher Duhamel on Monday. Duhamel, who has served 16 years on the council, was speaking to Town Engineer Kyle Zalaski and Town Manager **J. Mark Rooney**.

Zalaski provided an overview of work accomplished under the \$15 million bond and what remains to be done. **Rooney** asked that former Town Engineer Sheila McGauvran also be recognized for her work on the bond projects before Zalaski started his job with the town and when she served as a consultant during Zalaski's first year in Westerly. "It's an incredible feat and you should be commended for what you've done. We sat on other councils when we didn't get any real results," Duhamel said.

In 2019 about 11.5 miles of roads were resurfaced and the School Street reconstruction project, which is set to begin in March, was designed. This year about 8.2 miles were resurfaced on 42 roads. All of the 58 roads on the original road bond list have been resurfaced except for Pearl Street, which will be worked on next year. An additional 28 roads were also addressed under the bond. "In all the years that Chris and I have been up here, it's never gone this smoothly or this quickly, so it's pretty amazing," said Councilor Caswell Cooke Jr., who has served on the council for 14 years. "It's an incredible feat and you should be commended for what you've done. We sat on other councils when we didn't get any real results." - Christopher Duhamel, council president

Councilor Suzanne Giorno thanked Zalaski for providing the council with regular updates on road bond projects, which she said enabled council members to easily answer residents' questions.

The council recently authorized **Rooney** to proceed with a \$2.95 million contract with Ferreira Construction of New Jersey for the School Street reconstruction project. The utilities department will pay \$750,000 toward the cost of the project to cover the cost of upgrading the water system on the road and \$2.2 million of the road bond is earmarked for the project, which is set to occur

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

from March 1 to Nov. 1. A 25% contingency to cover potential cost overruns and the cost of project oversight has been established for the project. Councilor William Aiello said the contingency was too high and will unnecessarily tie up funds that could be used for other projects. Zalaski said town officials decided on a 25% contingency in light of cost overruns that occurred with a similarly expansive project on Cross Street a few years ago. "There is some concern that we thought warranted the 25%," Zalaski said. Aiello was also critical of decisions to add certain road projects during the course of the bond.

Not including the School Street contingency funds, there is about \$2.1 million remaining from the bond. In the running for those funds are projects on Bowling Lane, Breen Road and Pasadena Avenue, and Riverview Avenue. Other projects on the horizon include Church Street sidewalks, Atlantic Avenue resurfacing, work to rights of way on Waters Edge Road and Manatuck Avenue, and the reconstruction of Uzzi Avenue.

Rooney said he anticipated recommending a new \$5 to \$7 million road bond to be considered in a referendum in the spring to cover the cost of some of the more expensive projects that remain to be accomplished.

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

Providence Journal

May 21, 2020

On R.I.'s south shore, opening town beaches gets down to nitty-gritty

Author: Donita Naylor

Correction: Visitors to state and town beaches will not be required to wear cloth face coverings if they can consistently stay at least six feet apart from those in other groups. All beachgoers are asked to bring face coverings to the beach and wear them in any crowded area, such as bathrooms, concessions or parking lots. An earlier version of this story did not accurately describe the policy.

Remember before, when the things that triggered fear at the beach were a fin circling, a stomach cramp from swimming too soon after eating, or maybe sunburn, bullies, creeps or undertow? This year, danger at the beach is invisible and so much deadlier. Now, sitting downwind and within six feet of someone who sneezes, or touching a door handle last touched by someone who doesn't know they have the virus, or talking with someone not wearing a face mask can land you in a medically induced coma, and, if all turns out well weeks later, a wheelchair for your ride home from the hospital. Gov. Gina Raimondo has been careful to open only two state beaches, to test whether infection rates rise. Scarborough in Narragansett and East Matunuck in South Kingstown will open Monday, free of charge, but they will have no lifeguards, no concessions, no changing rooms or showers. Towns have to meet strict requirements before opening a town beach. They're tightening the rules for proving residency and, in some cases, allowing only residents to buy season passes. Nonresidents have to buy day passes. Towns will have to clean their beach facilities more frequently each day; require everyone to wear a mask in crowded areas such as bathrooms, concessions or parking lots; and enforce a limit of five people in a group and a distance of six feet between each group's beach blankets and umbrellas. Nobody wants a coronavirus carrier who doesn't know it, who hasn't served two weeks of self-quarantine upon entering Rhode Island and who doesn't wear a face mask. Seeing a spike in coronavirus cases in the saltwater beach towns would set back the progress that has come at so high a price to so many Rhode Islanders.

Only Westerly has announced it will open its town beaches in time for Memorial Day weekend, all three of them. Town Manager **Mark Rooney** said they'll open Friday. At the same time, the executive director of the Misquamicut Business Association, which represents about 40 businesses along a three-mile stretch with half-mile Misquamicut State Beach in the middle, is asking Raimondo to open that beach this weekend, or at least install trash containers and portable toilets and allow cars to park in the giant state lots. "People are going to come," said Caswell Cooke, executive director of the business association. "You can't stop them." With 2,800 parking spaces at the state beach shut down, those cars will flood the village. Cooke said that, with the state beach closed, his association will be picking up trash strewn along Atlantic Avenue for the half-mile of the state beach parking. He suggested that the governor might hope for rain this weekend. "By not opening that beach, it's going to be a public safety hazard," he said.

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

Rooney said people from New York, Connecticut, Massachusetts and Florida own second homes in Westerly, and they can get parking stickers for Wuskenau Town Beach and Larkin Road for access to East Beach, but they can't get passes for Westerly Town Beach. The problem is that it's impossible to know if a carload has been here two weeks or more for quarantine, he said. "Unless we see them cross the river, we don't know." The police approach will be officer discretion. "We're going to seek compliance, not confrontation," **Rooney** said.

Saltwater beach towns in South County — Westerly, Charlestown, South Kingstown, Narragansett and North Kingstown, are following directives from the governor that are outlined and detailed in ReOpeningRI.com. Towns are required to meet the new beach standards, Narragansett Town Manager James Tierney said. In Narragansett as in the other towns, the price of beach passes has not gone up, but residency rules have tightened. As issues arise, the town will have to solve them case by case, he and Narragansett Parks and Recreation Director Steve Wright said. Tierney promised that Narragansett Town Beach will open, but he wouldn't say when. It will be announced on the town website and social media.

The beach will have the same hours, 8:30 a.m. to 8 p.m., but unlike other years when the parking attendants left at 5 p.m., this year they will stay on duty until 8, turning away cars from elsewhere. Narragansett Town Beach has been widely perceived as a free beach after 5 p.m., but that will change this year. Narragansett beachgoers will see signs instructing them about the rules. "Please do your part to stay six feet apart," is one, Wright said, and another is that face coverings must be worn in the pavilion, restrooms, concession areas, when walking among others, but not in the water. Also, "If you're not feeling well, please stay home."

North Kingstown Town Manager A. Ralph Mollis said his town's beach is opening this weekend, but he didn't say which day. South Kingstown, like most towns, will open its town beach on weekends only until mid-June. In Charlestown, people who walk to a town beach can enjoy it for free. The towns are selling beach passes and parking stickers at the beach, through the mail or online. Residents who order and pay online are asked to call ahead, then wait at the curb for someone to bring them out. Each town's website has details about prices, hours, locations and who's eligible. "Everybody's adapting," said Terry Murphy, South Kingstown's director of leisure services. "We've found everybody to be very patient and understanding." It could be worse. Some "famous popular tourist places," she said, are selling beach reservations. Beachgoers turn up at a specified time and get an assigned spot.

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

The Westerly Sun (RI)

March 2, 2020

Council Seeks Funding Details as it Weighs Reduction in Transfer Station Operations

Author: Dale P. Faulkner

The Town Council is seeking more details on transfer station funding before it will consider approving a staff proposal to reduce the facility's operations one day each week. Town Manager **J. Mark Rooney** and Mike Serra, who manages the facility at Larry Hirsch Drive, asked the council to sign off on having the facility open to the public five days per week, but said they were aware that commercial haulers would likely need to continue on the new day of closure. **Rooney** and Serra said they preferred to close the facility on Mondays but would accept Wednesday or Thursday. The facility is currently open Monday through Saturday. On Mondays, workers from the Public Works Department staff the transfer station because the regular facility workers have the day off. By closing on Mondays, **Rooney** said overtime costs would be reduced and public works staff freed up to do their usual tasks. When the council approved a new fee schedule for the transfer station in July, **Rooney** said he planned to return in the near future to seek the council's consensus on closing the facility an additional day each week. Serra said closing an extra day is necessary for him to meet one of **Rooney's** requests. "I'm trying to eliminate some of the spending," Serra said. **Rooney** said the transfer station, which has been set up as a so-called enterprise fund since 2017, has required money from the general fund to balance its budget. In 2018, the facility required \$234,000, and in 2019 \$135,000 was needed. This year, **Rooney** said, the facility is on track to need \$330,000. In 2020-21, he said the facility will require \$1 million including expenses for equipment replacement. Enterprise funds are intended to function in a manner similar to businesses or come close to breaking even through revenues collected from charging for services. The loss of the international recyclable market has hurt municipalities throughout the country including in Westerly. "Recycling costs the town now," **Rooney** said. Handling and separating recyclable items takes time and is labor intensive, Serra said.

In addition to reducing days of operation, Serra said he is considering only accepting certain recyclable items on certain days. Some members of the Town Council asked for more time and data on expenses, while others said they had made up their mind already. "I'm not in favor of dropping days ... this is a public service," said Councilor Sharon Ahern, adding that cost savings might be possible through a change in how the aspects of the facility are managed. Councilor William Aiello asked for more information but remained open **Rooney's** request. "Maybe there are other changes to reduce costs and the you would not have to reduce hours," Aiello said. "Give us the data and let us look at it. If push comes to shove maybe some sort of change is warranted." Aiello also recommended seeking input from commercial haulers. Councilor Karen Cioffi questioned, as she had previously, whether closing an additional day would save money. "I need some data on what's behind all this ... these operations have gone on for many years and I don't understand why we got to this point," Cioffi said. Council President Christopher Duhamel said the request from **Rooney** and Serra would be better handled when the council deliberates on the proposed 2020-21 municipal budget.

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

The Westerly Sun (RI)
December 12, 2019

Rooney Receives Performance Bonus, Drops Bid for Job in Florida

Author: Dale P. Faulkner

The Town Council has approved a \$3,200 bonus for Town Manager **J. Mark Rooney**, amounting to 2% of his annual salary. The decision came on a 6-0 vote Monday after the council met in an executive session called to complete **Rooney's** annual performance review. **Rooney** announced before the vote that he had decided not to pursue a job opportunity in Florida, and Council President Christopher Duhamel said the two issues were unrelated. Duhamel said the performance review had been on the agenda, "and then news of him potentially interviewing elsewhere broke, and then he pulled out" of consideration for the other job.

An article on the website of the Panama City News Herald on Dec. 4 reported **Rooney** was a finalist for the position of city manager in Panama City Beach, Fla. At the time, **Rooney** declined to comment except to say that he had applied for the job after a recruiter encouraged him to do so. On Monday, during the public part of the Town Council's meeting, **Rooney** announced that he had decided not to seek the position and would not travel to Florida this week for an interview. **Rooney** did not respond to a request for further comment. According to Duhamel, the council had largely completed **Rooney's** review in September and scheduled Monday's executive session to consider giving him a bonus, as **Rooney** had requested. **Rooney's** three-year contract, which expires in August 2021, calls for him to receive a base salary of \$160,000 per year and includes a provision that allows the Town Council to grant performance bonuses at its discretion. "Given the review the council had of the manager we felt a bonus was in order," Duhamel said.

Rooney's review involved an assessment of his work by each member of the council. Individual councilors submitted their reviews to Duhamel, who compiled the results. His report, describing positive achievements and areas in need of improvement, was distributed to the full council. **Rooney** was named interim town manager in April 2018 and was later given permanent status. He previously worked for 20 years as a municipal administrator in Illinois. "I think he's doing a great job. It's tough to walk into a town with no basis of potential support but he has gained support from several organizations in town ... and the staff is respectful of **Mark** and listens to **Mark** and he's respectful of them," Duhamel said.

Duhamel also praised **Rooney** for appointing Shawn Lacey, a Westerly Police Department veteran, as chief of police. **Rooney** arrived to find a police department awash in ill feelings related to former Town Manager Derrik M. Kennedy's appointment of Richard Silva, and out-of-town candidate, to the position. Under **Rooney**, Silva entered into a separation agreement with the town and left the department. Duhamel also praised **Rooney's** work in renegotiating terms related to the town's solar project, which is to be built off of White Rock Road, and for successfully managing, in collaboration with his staff, the road work that is being performed under a \$15 million bond approved by the voters in 2018. "That was my biggest concern walking onto the council last November. In years past it was not made a priority," Duhamel said,

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

referring to the management of previous road bonds. Councilor Karen Cioffi, in a telephone interview on Tuesday, also praised **Rooney's** work. "He clearly has dug into the community and made himself seen," she said. Cioffi, a former human resources director for the town, credited **Rooney** with helping to improve employee morale, which she said had plummeted before his arrival. "They were in down in the dumps. Morale was terrible and he had to lift those people up," she said. Like Duhamel, Cioffi also pointed to **Rooney's** handling of the police administration, the solar project, and road work as noteworthy achievements. Duhamel and Cioffi were joined by Councilors Suzanne Giorno, Caswell Cooke Jr., William Aiello and Brian McCuin in voting to give **Rooney** a bonus. Councilor Sharon Ahern, the seventh councilor, did not attend Monday's meeting.

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

The Westerly Sun (RI)

November 8, 2019

Town Considers New Approach in Dealing with Risky Potter Hill Site

Author: Dale P. Faulkner

The Town Council has asked for more information about a proposed legal proceeding aimed at demolishing the dilapidated Potter Hill Mill property. The council met for 35 minutes in executive session on Monday to discuss hiring a lawyer who would petition a Superior Court judge, on the town's behalf, to be named as a special master to assist the town with its long-running goal of demolishing buildings on the property that are falling into the Pawcatuck River. A special master is appointed by a judge to oversee one or more aspects of litigation. "The council made no decisions, in fact, we asked for more information," said Town Council President Christopher Duhamel. Officials and neighbors of the 4.5-acre property are concerned that the run-down buildings pose a threat to people who might trespass on the property, and that a dam associated with the property is not being maintained. "There's a lot of liability with that property," Town Manager **J. Mark Rooney** said Thursday. **Rooney** said he asked the council to consider mastership as a means to address the mill property after discussing the idea with John Dorsey, a lawyer who is serving as special master in a case involving the former Bradford Dyeing Association site. Ideally, **Rooney** said, mastership would allow the town to eliminate the safety hazards without taking ownership of the property. Dorsey, who has not been hired for the case, declined to comment.

The town obtained a demolition order from the Superior Court in the 1980s but never followed through on the demolition. The property, which remained subject to the demolition order, was then sold to Edward Carapezza in 1992. The town agreed to hold off on demolishing the property to give Carapezza time to redevelop it, but eventually moved to commence demolition in the belief that Carapezza had failed to meet provisions of the agreement. Carapezza's Renewable Resources Inc., of Hopkinton, obtained a restraining order against the town to stop the demolition but the order was eventually lifted in 2013. The Superior Court judge who vacated the restraining order said the town had demonstrated its willingness to work with Carapezza and shared his hope that the property could be redeveloped. But by holding off on demolition, the town had "placed itself at risk. By not immediately eliminating the hazard, the town risked that people might get hurt in the buildings," Associate Justice Brian Stern wrote in 2013. Carapezza appealed, but the state Supreme Court upheld the demolition order later in 2013. Two years later, however, Carapezza was approved for \$500,000 in tax credits through the Rhode Island Historical Preservation and Heritage Commission and the state Department of Revenue for what was estimated to be a \$3 million renovation to two buildings on the property. The tax credits are believed to have expired. Carapezza did not respond to messages seeking comment. Between 1762 and 1958, when the Westerly Woolen Co. closed, the site was home to grist, saw, cotton and wool mills. A fire in the 1970s decimated much of the property. In 2018, Carapezza was cited by the state Department of Environmental Management for violating wetlands regulations at property he owns in Hopkinton.

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

The Westerly Sun (RI)
November 6, 2019

Residents Challenging Town's Findings on Private Roads

Author: Dale P. Faulkner

Residents of four roads are disputing the town's position that they should no longer receive services such as plowing and paving. The town has said the roads are private, but the residents argue that they should be considered public. Their lawyer made their case before the Town Council on Monday. "My purpose in coming to this meeting tonight was to request the council stay enforcement of this private road issue so that we can get a better handle on this issue," the attorney, Michelle Buck, told the council. Specifically, Buck asked the town to continue plowing her clients' roads until issues she raised were resolved. She represents Greenspace LLC, which she said has an interest in Guarino Avenue, Maggio Street, and Gavitt Avenue, three roadways that are in the Oak Street neighborhood. Greenspace LLC owns several properties on Trackside Drive, which is adjacent to Guarino Avenue. Buck, who formerly served as a member of the Town Council and as town attorney and town manager, also represents Susan and Michael Bookataub, who live on Michael's Way.

Town Manager **J. Mark Rooney** said he had directed the public works department to continue plowing Guarino Avenue, Maggio Street, and Gavitt Avenue because property owners had presented town officials with material showing that the roads probably qualify for acceptance as town roads. According to **Rooney**, the property owners are developing a petition for eventual submission to the Planning Board asking that the roads be accepted as public roads by the town. Buck said some historical records indicate that the town owned Michael's Way and the other roads connected to her clients. "There are, at this point, more questions than answers relative to the status of these roads," she said.

Rooney also offered to have town crews continue plowing Michael's Way at least until a title search that the town is performing is completed, but he questioned whether Michael's Way will qualify for acceptance as a public road. "I can hold it in abeyance until the title search and see if it's going to change, but I spoke to the developer who said, 'I deeded it'" to a private property owner, he said. The practice of the town plowing and providing other services on private roads has been on **Rooney's** radar for several months. Last fall he wrote to property owners on the roads and informed them that the town would stop providing the services. The Town Council intervened, saying that the residents had not been given adequate notice and that the plowing services were provided last winter.

But after the council's public works subcommittee and Town Attorney William J. Conley Jr. studied the issue, town officials announced in September that they had determined which roads in Westerly were public and which were private, and said services would no longer be provided to the private roads. More recently Buck's clients received another letter telling them the services would no longer be provided. On Monday, Buck said the letter contained errors, including an incorrect citation to state law. "So if this letter was meant to put people on notice as to what the

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town was saying or what the process was, it's really inadequate," she said. **Rooney** acknowledged that the citation was wrong, because of a typographical error. Buck said her clients have not had enough time to arrange for a private company to plow their roads and said there were "no mechanisms in place. There's no homeowners' association and no revenue available for residents of these roads to address these issues," she added.

Council President Christopher Duhamel thanked Buck for speaking to the council and noted that town officials had previously asked residents to provide information to prove their roads had already been formally accepted as part of the town's road system. Duhamel also asked that town officials' side with residents in cases where there were questions or doubt about the status of particular roads. Councilor Sharon Ahern, a lawyer, also thanked Buck but said she was not certain that the town was legally required to send residents a notice of the change in policy. "I'm not confident a letter is required," she said.

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

The Westerly Sun (RI)

August 20, 2019

Pleasant Surprise: A Budget Surplus in Westerly

Author: Dale P. Faulkner

Town officials are projecting a \$135,601 surplus from the 2018-19 budget. The surplus would have been greater, but funds had to be redirected to make up shortages in the transfer station budget as well as an overage in an insurance fund. "The positive news is we did finish still in the positive not in the red," Town Manager **J. Mark Rooney** told the Town Council Monday during an overview of the fiscal year that ended June 30. **Rooney** noted that the council had approved in December the use of \$334,000 from the surplus or fund balance to use as a deposit to secure the town's option to purchase 100 acres of land off White Rock Road. The land is the designated site of a planned public-private solar power project. "Otherwise, staff did a great job of staying within budget items, and revenues came in a little more positive [than projected]," **Rooney** said.

The transfer station will require an infusion of \$211,481 from the municipal general fund to balance its books for fiscal year 2019. Finance Director Dyann Baker said the facility's overage could be due to the facility running as an enterprise fund for the first time. The move to run it as an enterprise fund means costs that might have been paid through other parts of the municipal budget are now accounted for as part of the station's expenditures. Enterprise funds are government services that charge a fee for the service and are sometimes self-sustaining. **Rooney** has proposed new measures to reduce costs at the transfer station.

Councilor William Aiello said the transfer station was not expected to become fully self-sustaining in its first year as an enterprise fund. Council President Christopher Duhamel said the facility seemed to face the same financial challenges that have existed for years. **Rooney** said officials, before his arrival, appeared to have underestimated the costs associated with running the transfer station.

The insurance fund required expenditures of \$93,699 to cover the town's responsibility for claims made against the town such as slip-and-fall cases before the town meets its deductible and its insurer takes over payment. "What was not budgeted in 2018-19 was anything to support claims. We have a high-deductible plan to keep our premiums low, and that requires more out of pocket for small claims and we saw more than usual in this particular fiscal year," Baker said, noting that **Rooney** sought a special fund to help cover the claims costs in his budget proposal for 2019-20 but the fund did not survive the budget deliberation process.

Expenditures on legal fees of \$491,684 were more than twice the \$234,680 that was budgeted. Baker attributed the overage to legal work on contracts, including for labor unions and the lease agreement for the planned solar project on White Rock Road. Tax revenue, Baker said, was "pretty much in line with the budget," and she noted revenue from invested funds exceeded projections by \$200,000. "Investment revenue was very strong this year, and we can thank Barbara Perino for the work she did on that," Baker said, referring to her predecessor. Licensing

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and permit revenue was up as a result of increased permits for solar projects and mooring permits, Baker said. Competing with the gains were lower than anticipated hotel and meals tax revenue and lower than expected revenue connected to the state motor vehicle tax phase-out. Duhamel praised the work of both **Rooney** and Baker. "I'd like to acknowledge how well Dyann Baker and the manager, **Mark Rooney**, and his department heads, have followed this budget in the last months of the fiscal year to bring us within this target," Duhamel said.

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

The Westerly Sun (RI)
July 20, 2019

Former Town Planner Threatens to Sue for Severance Package

Author: Dale P. Faulkner

Rui Almeida, who was fired from his job as town planner in May, is seeking a severance package from the town. The Town Council discussed Almeida's request with Town Attorney William J. Conley Jr. during a closed-door, executive session that followed a regular meeting on July 8. No decisions were made or votes taken during the executive session, according to Town Council President Christopher Duhamel.

Almeida started in May 2018 and worked for the town for just under one year. He was initially placed on paid administrative leave by Town Manager **J. Mark Rooney**, who announced a few days later that Almeida would not return and that he had not been offered a severance package. **Rooney** has declined to discuss details surrounding Almeida's termination. The July 8 executive session was listed as a "potential litigation" item on the council's agenda. In response to a request for documents made by The Sun under the state Access to Public Records Act, Town Clerk Donna Giordano provided a letter from Lori Caron Silveira, Almeida's lawyer.

Silveira referred to a draft version of a lawsuit "asserting constitutional and other claims" on behalf of Almeida and said that it would be filed in court "if we are unable to reach agreement on severance terms." The letter also stated that Silveira had previously reduced Almeida's proposal for severance benefits "significantly." The lawsuit had not been filed as of Friday. Silveira said last week that she would check with Almeida when asked to share a copy of the proposed lawsuit. She did not return a message seeking comment for this article on Friday.

Almeida filled a vacancy created after former town Planner Jason Parker was placed on administrative leave by former Town Manager Derrik M. Kennedy in March 2018 and never returned to his job. Parker is now a member of the town Planning Board. Almeida holds architectural degrees from Roger Williams University and the School of Architecture of Lisbon and has a master's degree in the history of art — architecture and urbanism from the New University of Lisbon. He was assistant director for architecture and redevelopment in Central Falls, and deputy director of planning / city planner and administrative officer for Woonsocket from September 2016 until he took the job in Westerly.

Rooney appointed Nancy Letendre as town planner in June. Certified as a land planner by the American Institute of Certified Planners since 2007, she served as assistant town attorney for planning and zoning from 2017 until February and had worked in an of-counsel capacity at McGunagle Hentz, a Cranston-based law firm, since 2016. She was also principle planner for Mason & Associates Inc. of North Scituate, and worked for 18 years as a land use attorney at Ursillo, Teitz & Ritch, a Providence- based law firm.

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

The Westerly Sun (RI)

April 15, 2019

Westerly Finds Savings in Settlement with Union on Payroll Irregularities

Author: Dale P. Faulkner

Faced with an initial bill of about \$179,000 to settle payroll irregularities alleged by a labor union that represents both town and school department employees, town officials succeeded in negotiating the figure down to about \$60,000. Town Manager **J. Mark Rooney** confirmed the settlement last week, giving credit to Patricia Main, who he said first suggested that calculations performed by an auditing firm hired by Laborers International Union of North America were skewed. When **Rooney** started his job in May, he learned the town was about to pay the full \$179,000 but Main told him the figure was too high. "I trusted her and she proved worthy of the trust," **Rooney** said of Main, who first went to work in the school department in 2004 and now serves as senior payroll and human resources specialist in the municipal human resources department.

Audits of payroll records are conducted routinely on behalf of the union, which represents the town's public works employees as well as school district bus drivers, secretaries and maintenance workers, to monitor the town and school district's contributions to employee pensions. Salter & Company LLC., a Maryland-based accounting firm, reported school employees were shortchanged \$150,000 and that public works employee pensions were underpaid by about \$29,000. Both figures included interest. After speaking with Main, **Rooney** asked former interim Finance Director Barbara Perino and Nancy Markey, the municipal human resources director, to analyze the auditor's findings and the town's payroll records. **Rooney** said that former employees had recommended paying the full \$179,000. "Basically, I believed Patty Main more... Patty Main was the hero in this," **Rooney** said. According to **Rooney**, part of the town and school district's exposure in the case was due to antiquated record keeping and payroll processes used by the school department. He told the Town Council recently that a proposal to consolidate aspects of the town and school human resources functions would help modernize those functions.

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

The Westerly Sun (RI)

April 5, 2019

Rooney Says One Dispatch Center Could Save Money

Author: Dale P. Faulkner

Dispatch services currently handled by personnel at both the Westerly Ambulance Corps and the Westerly Police headquarters would be centralized at the police station under a proposal being floated by Town Manager **J. Mark Rooney**. **Rooney** discussed the idea with the Town Council Thursday during its second workshop on his proposed \$98.28 million combined general government and education budget for 2019-20. The council authorized **Rooney** and Chief of Police Shawn Lacey to begin discussions on the proposal with the ambulance corps. Under the current setup, fire and other non-police calls are dispatched by personnel at the ambulance corps, while dispatchers at the police department handle police calls. The ambulance corps is seeking \$75,000 as its annual subsidy from the town, double the \$37,500 it received in the current budget. More than half of the request, \$50,000, would be used to help cover the cost of upgrading dispatch center radio consoles at the ambulance corps' Chestnut Street headquarters. **Rooney** estimated the total cost of the new dispatch center at \$250,000.

Rooney said that his proposal "would help the residents by avoiding having to pay the duplicative cost of two dispatch centers." The police dispatch center was upgraded to a state-of-the-art level in 2017 and has the capacity to handle ambulance and fire calls, Lacey said. "It's not uncommon for police to take the 911 over," Lacey said. If the proposal takes effect, the police department would likely increase its dispatch center staffing from the current level of one full-time and one part-time employee per shift to two full-time dispatchers per shift, Lacey said. The added cost would easily be covered by revenues from fire departments that pay for dispatch services, Lacey said. The revenues would exceed the cost of running a centralized center, according to Lacey. "Actually, it would be a moneymaker," Lacey said. Dispatchers who currently work at the ambulance corps would be considered for positions at the police dispatch center, **Rooney** said.

Cost cut at animal shelter. The council also backed **Rooney's** plan to move the animal shelter back into the public safety section of the general government budget. At former Town Manager Derrik M. Kennedy's behest, the shelter was designated as an enterprise fund - a governmental function that provide services for a fee and is generally self-supporting. **Rooney** said the shelter has never been self sustaining and is not likely to be. Under **Rooney's** plan, one animal shelter position would be eliminated, reducing the shelter's budget to about \$247,000 per year. The council asked **Rooney** to review his proposal with Town Attorney William Conley. The council is scheduled to continue its review of the proposed budget during a meeting scheduled for Saturday morning at 9 in the Municipal Courtroom at Town Hall.

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

The Westerly Sun (RI)

April 4, 2019

Councilors' Wish List at Odds with Town Manager's Budget Proposal

Author: Dale P. Faulkner

The Town Council started its review of Town Manager **Mark Rooney's** proposed \$98.28 million combined general government and education budget for 2019-20 on Wednesday with a discussion of individual councilors' wish lists and the appropriate assumed tax collection rate. Several councilors questioned **Rooney's** decision to reduce spending for annual road work from \$750,000 in the current budget to just \$25,000, and to completely eliminate spending for sidewalks, after allocating \$125,000 this year. **Rooney** said he made the reductions in an effort to devise a balanced budget. He noted that road work would continue as a result of the bond approved by voters in November. That initiative calls for borrowing up to \$15 million from the state Infrastructure Bank over five years for road and infrastructure work.

Councilor Caswell Cooke Jr. called for restoration of the road and sidewalk accounts to current levels. "I understand the logic but the reason we need the bond is because we never put enough in. It's self defeating," Cooke said, noting that previous councils established a goal of spending \$1.3 million per year to maintain the town's roads. Councilor William Aiello proposed increasing the sidewalk expenditure to \$300,000. Councilor Suzanne Giorno called for \$125,000 for sidewalks and "close to \$750,000 for roads." Giorno and Cooke also asked that \$30,000 for the summer beach concert series be restored. **Rooney** had eliminated that spending from the budget.

As part of its line-by-line analysis of the budget, the council restored a \$5,000 request submitted by Flock Theater, the New London-based theater group that plans to stage Shakespeare and other plays in Wilcox Park after the Colonial Theatre's traditional Shakespeare in the Park presentation. The council decided against funding Colonial Theatre's request for \$10,000 for the summer series, with some councilors saying the organization should seek funding from the school district. The Colonial did not conduct its summer series last summer. Instead, the organization focused on programming it developed for students. The Granite Theatre's request for funding was also denied by both **Rooney** and the council.

Rooney's budget would require a tax levy increase of 3.85 percent, close to the 4 percent cap established by state law, and is based on an assumed tax collection rate of 98 percent. Councilors Christopher Duhamel and Brian McCuin called for basing the budget on a lower assumed collection rate. Duhamel said the lower rate would provide flexibility. McCuin said the lower rate provides a means to build up the town's undesignated fund balance when actual collections exceed the assumed rate. Unlike the Board of Finance's recommended budget, **Rooney's** spending plan would not use the undesignated fund balance or surplus to help balance the budget or reduce its effect on taxpayers.

Rooney advised the council not to follow the finance board's recommendation. "The rating agencies don't like it," he said. He was referring to bond rating agencies such as Moody's

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

Investors Service. Moody's made a slight downward adjustment to the town's rating in 2016, citing the use of the fund balance to balance the budget as a factor in its decision-making. Bond ratings affect interest rates charged to municipalities when they borrow for major projects such as road work or new buildings. Duhamel, after the meeting, acknowledged "a big gap between the councilors' wish lists" and **Rooney's** budget proposal. "But that's the process and this is the beginning. There will be significant changes as we move forward," said Duhamel, the council's president.

The Board of Finance recommended a \$96.3 million combined municipal government and education budget with \$38.65 million in town spending and \$57.7 million for the school district. The board reduced the budget request from school Superintendent Mark Garceau and the School Committee by \$1 million and **Rooney's** request by \$2.36 million. **Rooney** is proposing an additional \$200,000 cut to the proposed education budget.

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

The Westerly Sun (RI)
November 3, 2018

Rooney Sets Procedure for Choosing New Chief

Author: Dale P. Faulkner

With advertisements announcing the vacancy already running, Town Manager **J. Mark Rooney** hopes to name a new police chief by Dec. 20. Applications for the position will be accepted through the end of the business day on Nov. 26. **Rooney** said Thursday he plans to use two panels to conduct interviews: one that will consist of a mixture of citizens and municipal employees and one consisting of former and current police chiefs from the town and the region. A current Westerly Police Department patrol officer or detective will serve on one of the committees. The search became necessary Monday when the Town Council voted 5-2 to approve a separation agreement with former Police Chief Richard Silva, whose last day as chief was Wednesday. **Rooney** has refused to discuss why Silva left, citing personnel privacy concerns, and Silva did not respond to messages seeking comment on his status.

Silva's two-year tenure was marred by near-constant attacks by the International Brotherhood of Police Officers Local 503, the union that represents the Westerly Police Department's rank and file officers. The union was critical of former Town Manager Derrik M. Kennedy's decision to hire Silva rather than Capt. Shawn Lacey, at the time a 28-year veteran of the department who worked his way up the ranks from patrolman when he started in 1988 to second in command. Silva canceled a speaking engagement before the Westerly Lions Club after he was announced as Kennedy's choice for the job, but before his actual start date, when rumors of a planned police picket outside the meeting place circulated.

Upon starting he had to deal with several grievances filed by the union as well as a vote of no confidence approved by a majority of union members and later a call for his termination by the union. Town Councilor Mario Celico has continued to question the circumstances surrounding Silva's departure, saying **Rooney** misled the council during a private, closed-door executive session. "He said something in our session and then it proved to be inaccurate," Celico said Thursday.

Celico acknowledged meeting with Silva in the days before to his departure but said he followed Town Attorney William J Conley Jr.'s advice not to discuss what was then a proposed severance package. As part of the separation agreement, Silva agreed he would not file a lawsuit against the town, and the town agreed to pay him \$59,044 over the course of the next six months in increments equal to his normal biweekly pay. "I met with the chief because an accusation was made against him that if true would have shown a lack of professionalism on his part. The chief provided me with a document that showed the accusation was false," Celico said. Celico said he deliberately met with Silva at the Westerly Police Department. "Knowing full well that other people would see me," he said. Lacey, who is currently running the department, said Thursday, "I plan to pursue the position and am looking forward to and welcome the opportunity and hope that I'm selected" as chief. **Rooney** said the two interview panels would likely interview five to

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

seven candidates and recommend two or three finalists. The town's human resources director and a former police chief would do an initial screening of the resumes to determine which candidates are selected to be interviewed by the two panels. **Rooney** said he would interview the finalists and likely appoint one of them.

Lawsuit on age bias

In January, Lacey filed a lawsuit claiming that a law requiring all Westerly police officers to retire after 30 years is an attempt to circumvent age discrimination laws and is a violation of the state Civil Rights Act, the state Employment Practices Act and the federal Discrimination in Employment Act, which permits state and local governments to institute a mandatory retirement age of 55 for police officers. The law in question is a public law that applies to a specific town, as opposed to a general laws that applies to the entire state. **Rooney**, who started his position in April, directed Conley to let Lacey serve out the remainder of the current calendar year. The question of whether Lacey can continue working beyond Dec. 31 remains open. **Rooney** said he expects the court case to be resolved within 30 days, before he appoints a new chief.

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

The Westerly Sun (RI)

August 26, 2018

Town Manager Says Missing Laptop Reappeared After Threat of Prosecution

Author: Dale P. Faulkner

A missing town-owned laptop that had been issued to the town's former human resources director was turned in following the threat of legal action, according to Town Manager **J. Mark Rooney**. Joshua Putman, who left his position in June, turned the laptop in after initially saying he did not know where it was and at other times saying a different town employee had it, **Rooney** said. Ultimately, Putman, who now works in Mansfield, Conn., gave the computer to Mark Tate, the town's information technology director, on Aug. 10, a few days after **Rooney** sent a Westerly police officer to Mansfield Town Hall. The device was a Dell Latitude that the town purchased in 2016.

Putman now serves as assistant town manager in that Connecticut town. Putman was hired by former Westerly Town Manager Derrik M. Kennedy, who left his position in Westerly to become town manager in Mansfield. Kennedy started his new job in May. "The former H.R. director forgot to turn in his laptop and said it didn't happen. I didn't believe him and he produced the laptop," **Rooney** said, adding that he "made it very clear that I would prosecute." Putman did not return messages left Thursday morning and Friday on his voicemail at Mansfield Town Hall.

Rooney also said Westerly town staff have found human resources computer files missing. Some of the missing files pertained to a background check performed on **Rooney** before he was hired to become interim town manager. Some other personnel and employee pension files are also missing, **Rooney** said. "He deleted the files in a very deliberate manner ... he did a work-around on defeating the server backup system so it was willful and deliberate and has caused a great deal of work for his assistant to recreate and in some cases start from scratch," **Rooney** said.

The missing files delayed the Town Council's ability to hire **Rooney** on a permanent basis and caused other problems, **Rooney** said. According to **Rooney**, Putman left instructions for other human resources staff telling them where to find various computer files, but, according to **Rooney**, the files did not exist. "It was very unexpected and unprofessional in the way he departed the organization, and we did not know until we tried to retrieve different information and it did not exist," **Rooney** said.

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

The Westerly Sun (RI)

August 26, 2018

Rooney's Taking a Liking to Westerly

Author: Dale P. Faulkner

In his three months as interim town manager, **J. Mark Rooney** has orchestrated the response to a high-profile quarry blasting accident, helped devise a response to a summertime trash problem at the beach, and resolved one of the pending grievances that pitted the town's police union against town administrators. **Rooney**, during an interview Thursday, said getting involved with those issues and others ultimately played a role in his decision to see if the interim tag could be removed. The Town Council, pleased with **Rooney's** early performance, did just that, and he was sworn in as permanent town manager Monday. "After being the interim town manager for three months, I grew fond of the staff, and I saw the challenges and opportunities and issues, and they were very professionally rewarding, and it was a great opportunity," **Rooney** said. **Rooney** chose Westerly over other job possibilities. "I had a couple of opportunities in Florida, but when you have a job offer and you like where it is, why go to the next place? Florida might have nicer sand and warmer water, but it's the same ocean," **Rooney** said in the laid-back, straight-forward, folksy style that has emerged as a trademark characteristic. **Rooney** brings more than 20 years of experience as a municipal administrator in towns and villages in Illinois to Westerly. To his surprise, **Rooney** said, he has also become fond of his new hometown in New England, a region he said is not always embraced warmly in the broader town manager community. "I didn't think I would like New England. It doesn't have a good reputation in the business nationwide," **Rooney** said.

The complaints, **Rooney** said, center around a more difficult municipal budget process when compared to other regions in the country, concern that municipal business can move at a crawl if citizens excessively avail themselves of the right to speak during meetings, and an inclination toward "being parsimonious in pay." According to **Rooney**, when taken as a whole, New England towns pay their town managers and administrators less than any other part of the country. When the Town Council started its search to fill the vacancy created by the departure of former Town Manager Derrik M. Kennedy, the position was advertised as having a salary of \$120,000 to \$135,000. Eventually, members of the council agreed to consider paying more, and gave **Rooney** a base salary of \$160,000 per year with the possibility of financial bonuses for each year of the three-year agreement that **Rooney** signed Monday. To secure their investment, councilors insisted that **Rooney** be required to pay the town \$15,000 if he resigns within two years. The \$15,000 equates to the amount the council paid to a recruitment firm that assisted with the search that landed him. Town Councilor Mario Celico said **Rooney's** salary is a significant bump from what the town has paid town managers in the past. Kennedy was making about \$125,000 per year when he left. "It became clear that we really needed to step it up significantly," Celico said. It was Celico who asked **Rooney** to consider accepting a stable rate of base pay for three years. "I was concerned about the jump to \$160,000 and asked if he would consider an agreement with no guaranteed raises, and he agreed," Celico said. **Rooney** scored among the top three candidates in a matrix Celico used to rate the candidates, he said. The high

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score combined with his performance as the interim manager led Celico to believe **Rooney** was a solid choice, Celico said. With less than three months remaining before a new Town Council is elected, **Rooney** and current Council President Edward Morrone cited a few goals and priorities for the new manager. Morrone said he joined his fellow councilors in selecting **Rooney** as town manager "because I believe he showed his ability during the interim period." His previous work and life experience were important factors too, Morrone said. "And I like his military background. I think it provides a certain approach and ability when difficult circumstances arise," Morrone said of the retired U.S. Army lieutenant colonel. As he starts his tenure as the permanent town manager, **Rooney** said he is working on issues related to the proposed harbor management plan, including ensuring there is adequate access to mooring fields and to the shoreline. Some of the rights of way or paths to the shoreline have been partially absorbed over the years by neighboring property owners. In the case of Watch Hill, **Rooney** said he plans to speak with property owners with the goal of "making a manageable path to get to the beach."

He plans to use a diplomatic approach in recognition of the property owners' willingness to let the public use East Beach, even though the beach is privately held, he said. **Rooney** is also working with Town Engineer Sheila Mc-Gauvran to develop a clear plan for improving town roads. A new color-coded map in **Rooney's** office shows all of the roads. Different colors are used to rank the roads by condition. Along with the harbor management plan, **Rooney** said one of his immediate tasks is to help usher through an ongoing revision of the municipal Comprehensive Plan, which sets out development and preservation goals and priorities. Regarding the town's finances, **Rooney** said he'll work to "improve or preserve" the town's bond rating, an indication of the town's financial condition and a factor in determining interest rates when the town seeks bond funds for largescale building and road projects. **Rooney** is also working with Finance Director Dyann Baker to change how the town shows its cash reserves in budget documents to improve transparency for taxpayers and for the bond rating. "That can help how the rating agencies review the town's financial status," **Rooney** said. The bond rating, **Rooney** said, is of critical importance as the town prepares to ask voters to approve a \$12.6 million road bond in November and as school officials develop a proposed elementary school bond project that could go to voters in 2019.

Rooney is also looking to review town ordinances and regulations with the hope of making it easier to do business and start new ones in the downtown area. Morrone pointed to getting both the comprehensive and harbor management plans done as high priorities. Negotiations with municipal labor unions and filling vacant positions are also at the top of the list, Morrone said. The council focused on carving out an employment agreement that provides stability for **Rooney**, especially since he signed on so close to the election, Morrone said. "We don't want the manager to feel that a council change puts him in any jeopardy," Morrone said. When **Rooney** first moved to the town, he was living in a small efficiency apartment above a High Street restaurant. He has since moved to a full-sized apartment on Canal Street. His wife and two high school-aged children have decided to stay in Illinois until his son graduates at the end of the coming school year. **Rooney's** other son is in college.

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

The Westerly Sun (RI)

August 25, 2018

Rooney OKs Pact to Settle Grievance

Author: Dale P. Faulkner

A grievance filed by the International Brotherhood of Police Officers Local 503, the labor union that represents the rank-and file officers of the Westerly Police Department, has been resolved in the union's favor. A memorandum signed Aug. 3 by union President Patrolman Anthony Alicchio and Town Manager **J. Mark Rooney** outlines the agreement, which was struck while the grievance was pending before the American Arbitration Association and an arbitrator was about to hear the case. Arbitration is the final phase of the grievance process, which begins with the chief of police and then moves to the town manager and finally arbitration.

The grievance, which was filed in July of 2017, centers around the union's argument that its contract calls for the town to pay 82.5 percent of the cost of town provided health insurance and up to \$6,000 per year to retired police officers who wish to purchase additional health insurance until age 65. The memorandum of agreement concedes the union's stance on the contract language. As part of the agreement, the union agreed to withdraw the grievance.

Former Town Manager Derrik M. Kennedy had disputed the union's interpretation of the contract, which caused it to move to the arbitration phase. Kennedy, who negotiated the contract with the union, claimed the contract limited the town's contribution to a maximum of \$6,000 per year to be used toward the cost of the town-provided insurance. Robert Lombardo, a frequent critic of Kennedy's and town government in general, repeatedly said during Town Council meetings that the contract, which was approved in late 2016 and covers the period from July 1, 2016, to June 30, 2019, gave retired officers up to \$6,000 in reimbursement for extra insurance, but Kennedy stated repeatedly that Lombardo was misinterpreting the contract. The union later made the same claim, in the grievance, that Lombardo had made. Westerly Police Sgt. Paul Gingerella said the outcome in the union's favor "again goes to show that these aren't minor grievances we have filed and also shows the prior manager and current chief were wrong again." Westerly Police Chief Richard Silva said he allowed the grievance to move immediately to Kennedy. "I really had no involvement with the grievance. It was an issue between the former town manager and the union involving interpretation of what was then the new collective bargaining agreement as it pertained to health care benefits in retirement," Silva said.

Rooney said he interpreted the contract more broadly than Kennedy and believes the union's interpretation of the contract will not create a significant expense for the town. "The amount of ill will and anger that it generated for that [small of a] potential savings was so slight that it made no sense to me to have a fight on something I could resolve and not have another issue that would damage employee morale and trust," **Rooney** said during an interview Thursday.

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

The Westerly Sun (RI)
July 8, 2018

'Staunch Support' for Silva

Author: Dale P. Faulkner

The Rhode Island Police Chiefs' Association has entered the fray in the spat between members of the Westerly Police Department and town management. In a June 28 letter to interim Town Manager **J. Mark Rooney**, the association announced its "staunch support" for Police Chief Richard Silva. In May, the International Brotherhood of Police Officers Local 503, the labor union that represents the Westerly department's rank-and-file officers, wrote to **Rooney** to inform him that its members had approved a vote of no confidence in Silva, who has served as chief since November 2016. The union wrote to **Rooney** again on June 13 and asked for the removal of Silva from his position.

Col. James J. Mendonca, president of the police chiefs' association, in his letter to **Rooney**, said Silva has "demonstrated an unparalleled level of professionalism" and has displayed selfless and devoted service to the organization during his four years on the association's executive board. Mendonca is police chief in Central Falls. Silva currently serves as vice president of the association. Silva has faced intense scrutiny from members of the local union since he was selected by former Town Manager Derrik M. Kennedy over Capt. Shawn Lacey, the other finalist for the position.

Lacey has worked for the department for about 30 years, starting as a patrol officer and working his way up through the ranks. The union announced its displeasure with the selection of Silva before he even started and members of the local police honor guard refused to participate in his swearing-in ceremony. The letter from the police chiefs' association was intended "as a character rebuttal with regard to the unfortunate events that have taken place within the Westerly Police Department - namely the 'no confidence vote' in opposition to Chief Silva - which is clearly void of substance and veracity," Mendonca wrote.

Town Council President Edward Morrone on Friday said the council will have little if any involvement with the ongoing clash involving the union's dissatisfaction with Silva. "Obviously it's the manager's issue. He makes the appointment," Morrone said. Given **Rooney's** unfamiliarity with many of the issues, Morrone said it seems unlikely that he would act on the union's request. **Rooney** started his interim post on May 7. "I don't think the manager's in a position to, in any way, make this type of decision, at least not in the short term," Morrone said.

According to Morrone, **Rooney** is monitoring the situation and has communicated with the union and with Silva about the situation. Morrone said he has no reason to believe that members of the department are compromised in their ability to perform their duties. "I haven't been advised by my constituents of any such problem. I think the citizens of Westerly can rest assured they're protected and this does not seem to be affecting the delivery of the department's vital service," Morrone said. Mendonca asked **Rooney** to consider the entirety of Silva's work in law

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enforcement. He came to Westerly after completing a 28-year career in West Warwick, including eight as chief. "Chief Silva is a valuable and respected member of the law enforcement community that the RIPCA relies on heavily. It is with hopes that you see his value and leadership, and balance the hollowed accusations against him with his career accomplishments," Mendonca wrote.

The Fraternal Order of Police Association Lodge 10, a Westerly-based lay group that supports the town's police officers, has also inserted itself into the debate. The association wrote to **Rooney** and the Town Council on June 12 and called for Silva's dismissal. **Rooney**, Silva, Mendonca and Patrolman Anthony Alicchio, president of the Local 503, did not respond to messages seeking comment for this article.

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

[CB&A Note: The following article is one of several that follow related to **Mr. Rooney's** departure from the city of Carpentersville and a subsequent lawsuit. To summarize the situation, towards the end of **Mr. Rooney's** tenure in Carpentersville, the elected body made it clear it was time to part company and sent him home while they negotiated an exit agreement. Several weeks later, the Board withdrew its offer, stating he had voluntarily resigned when he ceased coming to work and denied him the severance money it was obligated to pay in the contract. **Mr. Rooney** subsequently pursued the matter in court. Ultimately, he was made whole financially and the city paid his legal fees. The net impact on Carpentersville is it paid about \$120,000 more than if it had simply honored the terms of the contract.]

The Daily Herald (IL)
June 22, 2018

Former Village Manager Sues Carpentersville, Seeking Severance

Author: Lauren Rohr

Carpentersville is being sued by former Village Manager **Mark Rooney**, who claims the village fired him five months ago and refused to pay him severance -- a violation of his contract. The village board voted in January to accept what it considered **Rooney's** "voluntary resignation," saying he had stopped reporting for work. The move came after weeks of negotiations surrounding **Rooney's** employment. The lawsuit filed Wednesday in Kane County argues **Rooney** was placed on involuntary leave, then terminated from the position he held for seven years. He never received the \$190,000 owed to him in severance and benefits, the suit says. It seeks at least \$217,000 in compensatory damages for breach of contract and violation of the Illinois Wage Payment and Collection Act. As of Thursday, village officials said they had not been served with the papers.

The complaint claims Village President John Skillman, the former fire chief, was "determined to terminate" **Rooney** since being sworn into office in May 2017. It also lists several instances in which Skillman apparently told **Rooney** he intended to fire him. As fire chief, Skillman underwent a disciplinary interrogation in 2016, at which point **Rooney** asked him to retire in lieu of being terminated, the suit says. Skillman was elected village president a year later, and three other newcomers were either elected or appointed to trustee seats by the time the village board started evaluating the manager position. Skillman said Thursday he never stated he would fire **Rooney**. He said the complaint is full of "inflammatory comments" personally attacking him. "This is about a contract. This is not about myself or any of the village board members," Skillman said. "It has nothing to do with what he's looking for (or) his end result. I'm really surprised to see him making these statements." Village Attorney Brad Stewart declined to comment, saying it would be "premature and negligent" to provide a statement before thoroughly reviewing the document.

According to his employment agreement, **Rooney** was entitled to nine months' severance pay at his annual salary of \$176,710, plus benefits and some unused sick time, if he were fired after five years. The contract also says **Rooney** can be deemed to be terminated -- granting him the

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severance compensation -- if he resigns at the village board's suggestion. When **Rooney** left the village, Carpentersville's then-attorney, Hart Passman, said **Rooney** was not entitled to that money because his resignation was voluntary. "He packed up his office and left," Skillman said. "He was never fired or terminated until he abandoned his post and didn't follow his own policy," which states that multiple days of unreported absence is deemed a voluntary resignation.

Rooney's employment was the topic of various special meetings from Dec. 12, 2017, to Jan. 24, 2018. During that time, **Rooney** turned down multiple separation agreements proposed by the village board, none of which offered the full severance allotted to him through his contract, according to the suit. After closed-session discussions Jan. 6, attorneys for both parties agreed **Rooney** would be placed on involuntary leave and would be paid through accrued benefit time while negotiations continued, the suit says. He received compensation for a two-week pay period ending Jan. 13. In a Jan. 8 email obtained by the Daily Herald, Skillman told department leaders **Rooney** moved his belongings out of his office Jan. 5 and would not return to work. He said **Rooney** had requested a separation agreement and advised the employees not to contact him.

The village board voted in open session Jan. 16 to approve a separation deal, which Skillman said was being finalized by attorneys. When the parties were still unable to reach an agreement, trustees rescinded the offer a week later and accepted **Rooney's** voluntary resignation, effective Jan. 5. The lawsuit calls **Rooney's** resignation "a fiction" and says his employment was terminated without cause. **Rooney's** attorney, Patrick Walsh, said **Rooney** declined to comment beyond what is in the complaint. The parties are due in Kane County court Sept. 5.

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The Westerly Sun (RI)

May 8, 2018

First Day on the Job**Town Welcomes Interim Manager**

Author: Dale P. Faulkner

On the night of his first Town Council meeting Monday, **J. Mark Rooney** was provided with a glimpse into a perennial topic of discussion - parking in Watch Hill. **Rooney** took his oath of office earlier in the day and then again during a ceremony at the start of the council's meeting. A 15-minute-long reception followed the ceremony, giving **Rooney** a chance to meet residents who were either on hand for other agenda items or who came to meet him.

The parking discussion had its origins in a proposal to lift a parking ban on Bluff Avenue to add 13 to 27 new parking spaces for the public. The Bluff Avenue proposal grew out of efforts last year to establish drop-off zones to improve shoreline access in Watch Hill and Misquamicut. On Monday, the Town Council agreed, by unanimous consensus, to drop the Bluff Avenue proposal after hearing the Watch Hill Fire District Council's proposed alternative - to establish seven parking spots in the district's Larkin Road parking lot for Westerly residents.

The spots would be free for residents parking for up to three hours. The district also plans to create a drop-off loop in the lot where an estimated three vehicles could pull in at a time, drop off their passengers, and then drive out of the lot without being charged. The lot will also be available for free after 5 p.m. in the hope of making parking available for residents. Rather than simply stand in opposition to the Bluff Avenue parking proposal, Randy Abood, Watch Hill Fire District moderator, said district officials developed the Larkin Road parking lot idea in the spirit of "seeking the common good and solutions."

Abood was joined by other district officials as well as property owners and representatives of businesses and other organizations including Daniel Hostettler, president and managing director of Ocean House Management, which runs the Bluff Avenue resort hotel, and Deborah Lamm, Watch Hill Conservancy chairwoman. Allowing parking on Bluff Avenue would detract from the look and feel of the village and could hurt business at the Ocean House, an important part of the town's tourism economy, Abood said.

Town Councilor Philip Overton praised the citizens of Watch Hill for "working in good faith." "I'm very impressed that in the spirit of community you have come forward with these really good ideas," Overton said. The fire district also plans to install an automated gate system and a security camera at the lot. Abood said he is in discussions with the district's legal advisor to determine whether the gate proposal will require approval by the district's voters. Regardless, he said, the drop-off loop and seven spaces for Westerly residents can be established immediately.

Rooney also witnessed another important aspect of the town - a group of citizens who pay attention to their local government. Hatsy Moore, a former Town Council member and a resident

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J. Mark Rooney

(Articles are in reverse chronological order)

of Watch Hill, took to the podium in Council Chambers to raise questions about the Larkin Road parking plan, saying it did not align with previous commitments made to Misquamicut Club members and residents who invested in the Lanphear Livery parking lot. "Welcome **Mr. Rooney**, I am your and the council's worst nightmare, but I have a sense of humor, and I've been threatened with being handcuffed," she said, alluding to a previous meeting during which she was asked to hold off from commenting at the podium because she was trying to speak at an inappropriate time.

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

The Westerly Sun (RI)

April 26, 2018

J. Mark Rooney of Illinois is Council's Choice for Interim Town Manager

Author: Dale P. Faulkner

The Town Council is prepared to offer the position of interim town manager to **J. Mark Rooney** of Highwood, Ill., pending completion of a background check. The council voted 6-0 Thursday in favor of offering the position to **Rooney**, contingent upon successful clearance of a background check that started Wednesday when the council named him one of two finalists for the job. Councilor Mario Celico did not attend the meeting. The decision followed a nearly 90-minute-long executive session of the council. A retired U.S. Army lieutenant colonel, **Rooney** has more than 20 years experience working in municipal government in four municipalities and villages in Illinois.

Councilor Philip Overton said **Rooney's** resume describes a career of "powerful leadership" and a "history of success as a town manager." "He's a great candidate," Overton said. According to his resume, **Rooney** received a Bronze Star for valor and a Combat Action Badge. He was wounded while in Iraq, where he served during Desert Storm and Operation Iraqi Freedom. He served as village manager in Carpentersville, Ill., from 2010 until January, and as chief of staff in North Chicago in 2009-10. He was village manager of Wheeling, Ill., in 2006-09, where he previously served as assistant village manager for three years. His resume also includes a stint as a staff assistant to the late U.S. Sen. Paul Simon, D-Illinois.

Hatsy Moore, a resident and close observer of local governmental affairs, asked the council why it was considering candidates who live so far from Westerly. The other finalist lives in Ohio. Moore also read from a petition that circulated in Carpentersville toward the end of **Rooney's** tenure there. The petition sought his removal as village manager. According to news accounts, **Rooney** ultimately resigned from the position. Moore also criticized the council for conducting interviews in executive session and for revealing only the names of three of the six candidates who were interviewed; 14 candidates submitted resumes. "These three candidates who were interviewed, we have no idea who they were. There was no input from the public, there was no information to the public but you people committed to transparency and open government," Moore said.

Councilor Jean Gagnier said he was not surprised that someone would look to leave Illinois, which is beset with serious economic problems. "Let me see, why would someone want to move here? Why would someone want to live near the ocean in a community that has a low tax rate and has a good balance sheet and is paying its pension liability as opposed to Illinois or Ohio?" Gagnier asked. Gagnier also said that the candidates for the job were allowed, under the state Open Meetings Act, to choose to have their interviews conducted in private. When council members decided on two finalists, they asked the two candidates if they could release their names and the candidates consented, Gagnier said. "We wanted their names out. We wanted them to be vetted," Gagnier said. Council President Edward Morrone, after the meeting, said

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

that **Rooney** discussed the end of his tenure in Carpentersville. “I’m comfortable that he disclosed everything we should know about the situation,” Morrone said. The council also completed the requirements and criteria it will seek from candidates for the permanent town manager position. The vacancy will be posted on the International City/County Management Association website starting Monday. Resumes will be solicited for 30 days. Today is current Town Manager Derrik M. Kennedy’s last day on the job after about 2.5 years in the position. He is leaving to become town manager in Mansfield, Conn.

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

Chicago Tribune (IL)

January 25, 2018

Ousted Carpentersville Manager Resigns, Board Withdraws Separation Deal: Officials

Author: Erin Sauder

Carpentersville trustees on Wednesday withdrew their separation agreement offer to **J. Mark Rooney**, saying the village manager voluntarily resigned when he stopped showing up for work earlier this month. Last week, the Village Board unanimously approved offering the deal to **Rooney**, who was hired as village manager in 2010. Village President John Skillman said at the time that attorneys were working out the terms. Trustees also approved naming Marc Huber, Carpentersville's assistant village manager/director of community development, as acting village manager on an interim basis. The board reconvened Saturday to continue discussing the separation agreement. At issue, according to village attorney Hart Passman, was the inclusion of a nondisparagement clause, a provision that means neither party can make negative comments about the other. "Mr. Skillman mentioned there was room for the attorneys to work out the details. We've been unable to do so," Passman said Saturday. "**Mr. Rooney** did not accept the village's effort to compromise on that provision."

During this week's board meeting, Trustee Diane Lawrence motioned withdrawing the village's separation agreement offer, saying **Rooney** voluntarily resigned his employment when he stopped coming to work. "Records indicate the last day he reported to work was Jan. 5. At that time, he cleared out his office of his personal belongings," Lawrence said. "According to the employee handbook, any employee who fails to come to work without notifying the village will be considered voluntarily resigned from the village. I motion to accept his voluntary resignation." Her motion was approved 4-2, with trustees Paul Humpfer and Don Burroway dissenting. "While the village was trying in good faith to find an agreeable solution to the subject of **Mr. Rooney's** employment, we identified that he had cleared out his office and stopped reporting to work," Skillman said in a statement following Wednesday's vote. "There is no circumstance in which an employee can just stop reporting to work and expect to maintain their status as an employee or expect taxpayers to foot the bill for a substantial salary and benefits package."

He added that the board had already been in the midst of addressing whether **Rooney** was the correct person to serve in the role of manager. "His voluntary resignation allows us to focus on moving the village forward in a new and better direction," Skillman said. "We are not interested in drawing unnecessary negative attention to **Mr. Rooney**, who we recognize has added some degree of value to the village in the past. But in the interests of openness, I do say that there have been increasing and continuing concerns regarding **Mr. Rooney's** communications with stakeholders in the village, his administrative decisions and his fiscal management of the taxpayers' resources." **Rooney** could not be reached for comment. Prior to coming to Carpentersville, **Rooney** was the village manager for Wheeling from 2006 to 2009 and Wheeling's assistant village manager from 2003 to 2006.

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

Daily Herald (IL)

January 16, 2018

Carpentersville Approves Separation Deal with Village Manager

Author: Lauren Rohr

The Carpentersville village board Tuesday night approved a separation agreement with Village Manager **Mark Rooney**, who has served in the position for more than seven years. Village officials did not immediately release the details of the agreement, and Village President John Skillman declined to comment. The unanimous vote came after a nearly hourlong discussion in closed session, in addition to a two-hour closed session during a Jan. 6 special meeting. The measure was not discussed in open session. "I will leave my position with a sense of accomplishment and thanks for all I have learned through the inevitable challenges with a position such as mine," **Rooney** said in a statement to the Daily Herald. "I served with a specific set of values and principles with the overriding goal to make the lives of Carpentersville residents better." Trustees also voted Tuesday to appoint Assistant Village Manager Marc Huber to the interim manager role, effective immediately. **Rooney**, an Army veteran, was hired as village manager in 2010. Last year, he was earning a salary of \$175,710 plus benefits, according to village records.

During his tenure, trustees supported two amendments to **Rooney's** employment contract, the most recent of which included a 5.5 percent raise that brought his annual salary up to \$167,000 in 2015. His salary was adjusted each year based on performance evaluations by the village board, according to the contract. The village board has seen significant turnover since Skillman, a retired Carpentersville fire chief, beat out incumbent Ed Ritter for village president last spring. Voters elected newcomer Diane Lawrence to a trustee seat, and Skillman later appointed John O'Sullivan and Jeff Frost to fill vacancies on the board. "In this era of compressed time, constant commentary and polarized politics, things do not always work as they should," **Rooney** said. "Elections have consequences. I leave my position with my head held high."

In his statement, **Rooney** thanked trustees and Ritter for working cooperatively "with a mutual sense of respect and trust." He lauded the village's improved transparency rating, the creation of a community development department, new economic activity such as the Walmart Supercenter, and various other accomplishments in the last seven years. Skillman said no decisions have been made for finding a permanent replacement for **Rooney**. The village board is expected to discuss its next steps at a later date. **Rooney** previously served as village manager in Wheeling, a position from which he resigned in 2009. At the time, two trustees said his departure came after a majority of the board indicated in closed session that they no longer supported him. Before Wheeling, **Rooney** served as village administrator in Highwood.

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

Daily Herald (IL)

June 29, 2017

Carpentersville OKs Settlement with its Former Director of HR

Author: Lauren Rohr

Carpentersville's human resources director resigned last month after village officials indicated they were contemplating her termination, according to a separation agreement. Samantha Brunell, who had been on the job since last July, was placed on administrative leave May 10 while the village assessed her performance and the needs of the department, Village Manager **Mark Rooney** said in a memo to the village board. She resigned from the position six days later as part of a settlement that would pay her salary and benefits through June 30.

What led to Brunell's departure — and the village's roughly \$13,738 payout — remains unknown. **Rooney** declined to discuss personnel matters, and Brunell was unavailable for comment. Under the agreement, which was approved last week by the village board, both parties are releasing one another from any "claims, demands, causes of action or liability" related to Brunell's employment or departure. Brunell will also receive a letter of reference from **Rooney**.

In addition to her human resources role, Brunell served as the assistant to the village manager and handled public relations responsibilities. She was employed in the finance department, and her starting salary was \$70,000. Carpentersville officials are now working with an outside consulting firm, GovHR USA, to review the vacant position and consider a possible staffing reorganization, **Rooney** said.

Jeff Monteleone, the village's senior management analyst, is taking over Brunell's human resources duties on an interim basis with help from **Rooney** and Assistant Village Manager Marc Huber. The village will not backfill the analyst position until they determine whether Monteleone is a good fit in human resources, **Rooney** said. Additionally, he said, department heads have been trained to handle some public relations responsibilities, such as writing news releases. The village might also consider hiring part-time consultants to help with special projects. **Rooney** said the review and reorganization period is expected to be complete by the end of August, when planning for the 2018 budget cycle begins.

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

Courier News (IL)

March 30, 2017

Carpentersville, Illinois Policy Institute, Website Transparency**Carpentersville Lauded for Transparency**

Author: Erin Sauder

Carpentersville has been recognized by the Illinois Policy Institute for its "highly transparent" municipal website. "This kind of transparency is critical for trust," Village Manager **Mark Rooney** said in a news release. "We strive to make sure we remain accountable to our taxpayers." The transparency score of 96.2 percent represents nearly a 5 percent improvement since the last audit in December, and more than a 45 percent increase since 2013. Those scores were 91.6 percent and 50.6 percent, respectively.

The Illinois Policy Institute ranks municipalities, townships, school districts, libraries and other entities for transparency based on their websites. "Over the past few years, the IT Department has consistently worked with the village board, village manager, and village staff to evaluate ways to redesign our website in order to make key information more readily available to our citizens and businesses," said IT Director Kevin Goethals.

After receiving the dismal score in 2013, a new page was created dedicated to government transparency (cville.org/Reference-Desk/Website-Transparency.aspx) and allows searching through links to all of the information from a 10-point transparency checklist in just one click. The checklist evaluates how accessible it is to find information on a municipality's taxes and fees, lobbying activity, bids and contracts, salary and benefits, expenditures, financial audits, budgets, public records, meeting information, and contact information for elected and administrative officials.

Carpentersville received perfect scores in seven out of the 10 categories on the checklist in the latest audit. "Our goal is to reach 100 percent transparency," Goethals said. "We want Carpentersville residents to have the ability to easily contact village officials, while making key village information readily available to anyone visiting our website."

Internet – Newspaper Archives Searches

J. Mark Rooney

(Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **J. Mark Rooney** is listed below.]

<https://www.ilcma.org/programs-and-services/awards-program/special-service-award/>

J Mark Rooney

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The Special Service Award is presented to individuals who have notable association or affiliate activity and significant professional accomplishments, including private interests, family interests, acts of heroism, charitable acts, or social accomplishments.

2016 **Mark Rooney**

For his outstanding service and leadership to the local government management profession as shown through his support of members in transition.

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

Daily Herald (IL)

June 23, 2016

Lawsuit Headed Back to Court, with a New Judge

Author: Lauren Rohr

A lawsuit filed by East Dundee officials, who are trying to prevent Wal-Mart from obtaining more than \$4.3 million in special taxing funds for its new Carpentersville store, is headed back to court, this time with a new judge. East Dundee Attorney Tom Gardiner said state law prohibits tax increment financing funds from being used to entice a business to relocate within 10 miles. Because the new store is less than three miles away, East Dundee argues Wal-Mart does not qualify for TIF funds, Gardiner said, noting the village wasn't trying to stop the store from opening. Kane County Judge David Akemann dismissed the lawsuit last year, saying East Dundee's case lacked standing. The village appealed that decision, as well as an order denying the village's motion for a substitution of judge.

After the appellate court decision Monday, the lawsuit will go back to the circuit court, and East Dundee can continue making its case in front of a new Kane County judge. The decision also means Akemann's ruling is void. "This shows we have standing, we have merit in this case," East Dundee Village President Lael Miller said. "The important thing is for us that this validates the fact that we did have a valid case and that the previous judge's ruling is tossed out."

Carpentersville Village Manager **Mark Rooney**, who argued the village did not violate TIF laws, said the appellate court decision to put a new judge on the case doesn't mean Akemann's initial ruling isn't valid. Wal-Mart and Carpentersville officials have argued the company's decision to move was market driven and a result of circumstances beyond its control. "It's a meritless case," **Rooney** said. "It's a complete waste of the taxpayers' money in East Dundee, and now they're also wasting Carpentersville taxpayers' money to defend a meritless case." **Rooney** said the village has not yet decided its next steps.

In a TIF district, the property tax revenues that go to local governments are frozen for up to 23 years at a certain level, which is set on a base assessed property value. Any taxes generated above that level can go back into redevelopment. The new Wal-Mart Supercenter in Carpentersville held its grand opening early Wednesday. East Dundee estimated it would lose an estimated \$60,000 to \$80,000 per month in sales tax revenue after the closing of its Wal-Mart store.

Daily Herald (IL)

April 27, 2016

Carpentersville Firefighter's Union Seeking Arbitrator in Disputed Layoffs

Author: Lauren Rohr

Amid contract negotiations with the village, the Carpentersville firefighter's union is asking an arbitrator to negotiate the layoffs of two full-time firefighters. The layoffs took effect Friday, but the union filed a grievance last month after they were announced, claiming the move violated the current contract, which expires at the end of the month, said Rick Nieves, president of the Carpentersville Professional Firefighters Union. But the union and the village disagree vehemently on the circumstances that resulted in the layoffs, mainly centering on cost savings.

In 2014, the union and village signed a "side letter" agreeing to a swing shift, which moves firefighters from normal to short-staffed shifts. The agreement called for the village not to lay off any firefighters during the duration of the contract, as long as the swing shift structure saved \$75,000 annually. "It's the village's position to end our side letter because the savings that were promised did not materialize," Village Manager **J. Mark Rooney** said. Nieves said the swing shift did reduce overtime costs by \$75,000, but the village used the additional funds ineffectively, "not at the fault of the union." He also argued the layoffs wouldn't result in significant cost savings, as the village would have to pay overtime costs and part-timers to make up for the loss. "We strongly feel that these layoffs are not really necessary and are against the agreement we had with them this last time around," Nieves said. "We don't feel there's a true bona fide economic problem." The two parties were unable to come to a resolution during negotiations, Nieves said, and the union is requesting a third party to settle the dispute.

Rooney said he made an offer during contract negotiations to postpone the layoffs until the end of negotiations, but it was rejected by the union. "If we didn't find the savings, (layoffs) could've still happened," **Rooney** said. "But it wouldn't have to happen until that point in time when we concluded those negotiations." Nieves said the union never received a formal offer to stave off the layoffs. Instead, he said, **Rooney** indicated he would rescind the layoffs if the union paid the full salaries and benefits for the two firefighters. **Rooney** denied such an offer was ever made.

Contradicting statements from both parties don't end there. Nieves claimed the fire department is the only unit in the village experiencing layoffs, while **Rooney** says cuts are being made across several other departments. Nieves says the two firefighter layoffs would save only \$20,000 per year, and **Rooney** argues it'll result in about \$100,000 in net savings. **Rooney** said the union linked negotiations about the layoffs to an unrelated issue: Allowing firefighters to wear shorts while on duty. Nieves said the union always handled the two issues separately. Now, Nieves said, arbitration is the union's last chance to restore the firefighters' jobs. "I'm hoping at some point in the near future (the village will) still rescind the layoffs and we can come together," Nieves said. "Losing two guys is an unfortunate situation, not only for the community but also for the guys and their families."

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

Courier News (IL)

March 18, 2016

Carpentersville, Branding, Spring Hill Mall, Meadowdale, District 300**Carpentersville Trying to Change Village's Public Perception**

Author: Erin Sauder

Carpentersville officials know that changing the village's public perception could be an uphill battle. But it's one they're willing to take on. About 30 individuals, including staff and board and commission members, took the first step in the branding campaign process by attending a brainstorming workshop Wednesday, led by Bill Balling, managing director of the WRB LLC consulting firm. His colleague, Adriane Johnson, an associate consultant, also attended the workshop. "Branding is essentially everything you do," Johnson said. "It isn't just the logo. It's a specialized type of marketing to help tell a community's story. It gets to the foundation of what makes a place desirable. It's also what people say about you when you're not around."

She said the goal of branding is to enhance and/or improve the community's image and attract the desired residents, businesses and visitors. Attendees were asked to weigh in on the village's strengths, weaknesses, opportunities and ultimate threats. Carpentersville's industrial base, diversity, residents, services, walkability, location and long-range planning topped the list of the village's strengths. "Most of our town is pretty well kept up," Village President Ed Ritter said. "There's some dark spots here and there and we have to keep fighting them but that percentage is much lower than it was 10 or 12 years ago."

As for the village's weaknesses, "public perception," said former trustee Kay Teeter, who is currently a member of the Business Development Commission. "That's huge." "The lowest hanging fruit on the weakness side is the perceived level of crime and the actual level of crime which is lower than our surrounding communities," added Trustee Kevin Rehberg. "There are metrics out there that prove this." Traffic flow and the negative perception of the area's public schools were also noted as weaknesses.

Village Manager **Mark Rooney** said the village's business corridors also provide a challenge. "We have Randall Road, Route 31 and Route 25 — they don't have any correlation," he said. "There's a very different challenge of marketing Randall Road than Route 25." As for Carpentersville's opportunities, the riverfront was suggested. "Our section isn't developed yet," Rehberg said. "You can't get a motorboat in there. You have to paddle, with a canoe or kayak. But the fishery has rebounded tremendously. When you get to the Dundee area it turns more urban. We're in this transition zone between a highly boatable area to this urban Dundee area." He added the village "has a real opportunity to make ourselves attractive to new families that are fleeing Chicago." "Most people don't want to raise families in the Chicago public schools anymore," he said. Trustee Jeff Sabbe said District 300 also "is a huge opportunity for us." He cited the district's partnership with Elgin Community College which is allowing qualified high school seniors the opportunity to enroll at ECC full-time and earn up to 32 college credit hours, tuition free. Another suggestion was implementing community events throughout the year

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

instead of just spring through fall. As for threats to the village's success, declining equalized assessed values, lack of revenue, and Spring Hill Mall were mentioned. Rouse Properties, which owns Spring Hill Mall, asked to partner with both Carpentersville and West Dundee to bring the \$40 million renovation project to fruition. Plans call for a movie theater, restaurants, and a new layout. Mall officials were seeking \$8.6 million total in financial assistance from Carpentersville and West Dundee, with the majority, about \$7.4 million, coming from the latter since most of the shopping center falls within the village. Carpentersville's ask is about \$1.2 million. "Two villages have spent a lot of time and money but it is very possible that mall will fail," **Rooney** said. "That's a pretty big threat."

He cited the Meadowdale property which runs from Besinger Drive to Lake Marian Road. At one time, the shopping center on the property was a popular draw due to anchor stores such as Wieboldt's and Woolworth's. It was such a high-trafficked area in 1960 that John F. Kennedy delivered a stump speech there while running for president. "That threat would be a repeat of what happened to Meadowdale and create a perception problem," **Rooney** said. "It went from a JFK rally point to nothing." The next workshop on the initiative is set for next month. "I'd like you to think about and reflect on the topic we're discussing this evening and come back in early April and get additional feedback," Balling said.

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

Daily Herald (Arlington Heights, IL)
September 18, 2015

Ex-Kaneland teacher settles federal lawsuit over DUI arrest

Author: Harry Hitzeman Legal Affairs Writer

A former Kaneland School District 302 teacher has settled a federal lawsuit against Carpentersville police that argued he was roughed up after a 2010 DUI arrest. Ryan Wlodek, 35, of Elgin, reached a settlement last month after suing the village of Carpentersville, along with Officers Donald Wells and Matthew Lipke, records show.

Carpentersville Village Manager **Mark Rooney** said officers did nothing wrong and the village wanted to fight the lawsuit. However, the village's insurance carrier decided it would be better to pay \$7,500 in a no-fault settlement than to go to trial and pay some \$20,000 in legal fees, plus risk more in damages if the village lost the case.

"He was not in any way mistreated. The officers did nothing wrong," **Rooney** said. "(The insurer) made a business decision that the village didn't support but had no power to stop. It would have been more costly to defend."

Wlodek initially was charged with felony obstruction of justice, DUI and attempted fleeing and eluding and stemming from his July 4, 2010, arrest. After years of delays in his case, he pleaded guilty to the reduced charges of misdemeanor DUI and obstruction of justice earlier this year and was sentenced to court supervision, records show. He was charged with felony obstruction because he refused a breath test and wanted his blood drawn at a hospital instead. Wlodek, a former science teacher at Kaneland High School and most recently a teacher at Kaneland Middle School, resigned from his post effective Sept. 11, according to the school district.

Wlodek filed an excessive force lawsuit in 2012 against the village and officers. In the lawsuit, Wlodek argued he was punched in the groin and officers purposefully drove erratically, turning quickly to slam him from side to side while he was handcuffed and in the rear of the squad car.

David Lipschultz, the attorney representing Wlodek in the federal lawsuit, said he "could not comment at all" on the lawsuit or settlement when reached by phone.

Jeannine Gilleran, an attorney who represented the village and two officers in the lawsuit, did not return messages.

Federal Judge Charles Norgle dismissed Wlodek's suit "with prejudice," meaning it cannot be refiled in the future.

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

Daily Herald (IL)

April 30, 2015

Carpentersville Manager Gets 5.5% Raise in New Village Budget

Author: Madhu Krishnamurthy

Carpentersville village leaders approved a 5.5 percent pay raise for Village Manager **Mark Rooney**, part of a roughly \$46 million budget of expenditures for the remaining eight months of this year, which officials say includes no staffing or service cuts. **Rooney's** yearly salary goes up from \$158,000 to roughly \$167,000 retroactive to Jan. 1. He also gets five more vacation days (25 in total) and guarantees nine months of severance pay that equals his current pay, plus fringe benefits, if he is fired after five years of service for any reason other than being convicted of a felony.

Rooney said the salary increase is comparable to what managers/administrators of neighboring communities receive. "I'm still nine out of 10 in the ranking of salaries (of managers)," **Rooney** said. "I just bumped ahead of Lake in the Hills village manager." **Rooney** received a similar salary increase last year, as did a few other department heads.

Chris Scholl, a firefighter who ran unsuccessfully for the village board in April, said **Rooney's** pay hike is "fiscally irresponsible at a time when the village is talking about deficits." "What concerns me is also that this contract spells out his severance package, and severance packages should be dealt with at the time for severance and based upon the reasons for that severance," Scholl said. "The taxpayers should not be on the hook for (paying) \$125,000 plus the fringe benefits ... he will also be compensated for unused vacation time and unused sick leave, which no employees get in the village."

Rooney said the increases are justified by how much money the village has saved through his leadership. "I had a good year last year," **Rooney** said. "We successfully got a \$400,000 OSLAD (Open Space Lands Acquisition and Development Program) grant and a U.S. EPA (Environmental Protection Agency) grant of \$628,000. Wal-Mart Supercenter successfully coming to town is a pretty significant event, which will be \$1 million in sales tax (revenue) every year."

The Wal-Mart project — targeted for 26 acres along Lake Marian Road and Route 25 — is a nearly \$30 million development, which includes a \$4.3 million village incentive funded through a special taxing district to help with site improvements, such as the widening and signalization of Lake Marian Road, said Joe Wade, assistant village manager. Construction of the supercenter is expected to begin this summer and open by fall of 2016, officials said.

The village seems to have turned the corner after eliminating 34 positions during the past four years through layoffs, consolidation, reorganization, retirements and attrition. No personnel cuts are in this budget, **Rooney** said. "We save on an annual basis on salary and health care costs of over \$1.5 million," **Rooney** said. The village also has saved roughly \$195,000 by refinancing an

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

IEPA loan earlier this year, and nearly \$100,000 in yearly debt service when borrowing \$10 million for infrastructure improvements that will be completed over four years, he added. The 2015 budget includes a salary increase of 1 percent for public works employees, and 3 percent for police and firefighters. On average, personnel costs increased 2.2 percent, and health insurance costs increased 2.5 percent, Finance Director Hitesh Desai said. The village will be spending nearly \$10 million on water and sewer improvements, and \$3.5 million on infrastructure projects this year, and roughly \$2 million on water main and road improvements related to the Wal-Mart project, in addition to the business incentive. Starting next year, Carpentersville will follow a calendar year budget once the tax levy is determined in December, officials said.

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

Courier News (IL)

April 5, 2015

In Wake of Spat, Official Hires Private Detective

Author: Mike Danahey

Carpentersville Village Manager **Mark Rooney** said he is spending his own funds on a private detective after a March 14 altercation with a member of the Finance and Audit Commission. Harry Brown, of H. Brown Investigations, said he was hired by **Rooney** shortly after the incident with Humberto Garcia. Garcia, a Carpentersville trustee candidate, filed a police report regarding **Rooney's** actions during and outside a Finance and Audit Commission meeting March 14 at the town's public works building. "**Mr. Rooney** has a reputation to protect, with military service and an exemplary career," said Brown.

During the March 14 session **Rooney** questioned claims some people in town and some firefighters have been making that the Fire Department is understaffed. Garcia responded that he had heard those claims and that the department is understaffed. He asked **Rooney** if those people are lying. **Rooney** asserted that they are lying, noted Garcia has been on the commission for several years and that the numbers were there before him.

Rooney commented, "If you can't figure it out, I can draw you a picture. But if you can't understand what's before you, I can't help that God didn't give you enough gift to process the information." That escalated into a heated discussion in the public works building lobby at a break during the meeting. Police investigated and did not pursue charges. Brown said he is now investigating the matter. "This is in no way about the police investigation," **Rooney** said.

On Wednesday, after an executive session at its village board meeting the prior night, trustees issued an online statement that communicated to **Rooney** "its expectation that all village employees, especially those in leadership positions, conduct the village's business in a way that is professional and respectful of others at all times." Beyond that, the board took no action on the matter. Garcia was disappointed the board apparently took no disciplinary action. "As a public official, he should not behave like that," Garcia said.

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

Courier News (IL)

April 1, 2015

Carpentersville Meeting Gets Heated; No Charges**Police Investigate After Trustee Candidate and Village Manager Trade Insults**

Author: Mike Danahey

Insults about intelligence and bitter debate between the Carpentersville village manager and a village trustee candidate spilled over into an angry confrontation outside a meeting room, leading to a police investigation but no charges, officials said this week. Carpentersville trustee candidate Humberto Garcia filed a police report regarding Village Manager **Mark Rooney's** actions during and outside a Finance and Audit Commission meeting March 14 at the town's public works building. Garcia has been serving on the commission for about four years.

Responding to a Freedom of Information Act request from The Courier-News, Carpentersville released a video, police reports and the results of a police investigation about the incident with a memo that states: "Based on interviews and review of the evidence, there is no basis for pursuing criminal charges against any of the individuals involved." Still, Carpentersville Village President Ed Ritter said that the matter would be discussed in executive session following the Village Board meeting Tuesday night and that an official statement would be posted on the village's website after that discussion.

What led to the heated discussion and the ensuing report and investigation was a comment **Rooney** made to Garcia during the March 14 meeting. On an audio of that meeting obtained through the FOIA request, more than 20 minutes into a discussion of the fire department's proposed budget, **Rooney** calls into question claims some people in town and some firefighters have been making that the fire department is understaffed.

Garcia responded that he had heard those claims and that the department is understaffed. He asked **Rooney** if those people are lying. **Rooney** asserted that they are lying, noted that Garcia has been on the commission for several years and that the numbers are there before him. **Rooney** commented, "If you can't figure it out, I can draw you a picture. But if you can't understand what's before you, I can't help that God didn't give you enough gift to process the information."

According to Garcia, the matter escalated at a break several hours into the session, prior to him leaving to participate in the East Dundee St. Patrick's Day parade. The report released Monday notes a surveillance video from the lobby that caught the incident. The video, with no audio, shows Garcia using a finger to emphasize a point and **Rooney** immediately stepping into Garcia and using the same gesture, the report states. "Humberto did not appear to be threatening at that point, and **Mark Rooney** appeared to be the aggressor by stepping into Humberto," the report states. Then, "as Humberto was walking away **Mark** suddenly turns and approaches Humberto again at a fast pace and **Mark** is again using his finger in a poking motion to emphasize his point," the report states. Garcia exited the front door but then comes back into the lobby, the report states. Garcia looked toward the meeting room, then **Rooney** walked toward Garcia, the

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

report states. Garcia does appear threatened at this point, the report states, "as he slowly edges toward **Mark** with (redacted name) in between them. As (name redacted) grabbed **Mark**, it appears he is trying to shepherd him away from Humberto." "It appears that **Mark's** body is leaning in towards the meeting room and not towards Humberto, and **Mark** appears to look directly at (redacted name) and **Mark** says something to (redacted name) who immediately releases **Mark** and lets him pass." The report states, it "doesn't appear that **Mark** is trying to physically harm or threaten Humberto. It appears to be a disagreement that became personal, not criminal. Although there were many things said that could be considered insulting and unprofessional, it does not appear that any of these things would rise to the level of criminal conduct in that no physical threats were muttered."

According to the reports, **Rooney** told police that Garcia stopped him in the lobby and asked for an apology for what **Rooney** said during the meeting. **Rooney** said he would not apologize, the report states. **Rooney** told police Garcia threatened to have **Rooney** fired if Garcia got elected as a trustee. **Rooney** also claimed Garcia made a comment about "beating an apology out of him." **Rooney** said he "told Garcia he was a son of a bitch if he thought he could use violence against him." **Rooney** also advised police that during the argument, "he did make a comment to Humberto about beating his wife."

Tuesday, Garcia said he would wait until after the Village Board meeting to make any further comment. **Rooney** could not be reached for comment Tuesday afternoon. As for **Rooney's** comment about Garcia and a domestic offense, according to a redacted police report, officers were called to the Garcia home on Oct. 13, 2013, about a physical altercation. Media outlets learned about the incident last week from a tipster. Garcia was taken into custody and charged with domestic battery, according to the report. Garcia and his wife, Bibiana, said that the Monday after the incident she and her daughter asked to have the charges dropped and thought they had been, but soon learned they had not.

According to online court records, on Jan. 30, 2014, Garcia pleaded guilty and paid fines and fees totaling \$820. He completed counseling, and the plea was vacated Nov. 20, 2014. The Garcias said Friday that they didn't want to bring up the matter because of their children and the attention it might receive. "It was embarrassing," Garcia said. Garcia has lived in Carpentersville for 20 years and owns and operates Meadowdale Performance Garage, He said he intends to remain in the race for one of the three spots on the village board up this April.

One of the other trustee candidates, incumbent Paul Humpfer was sentenced to a year of probation in October 2008 and ordered to enroll in a 26-week domestic violence program because of an incident with his wife in May 2007. Humpfer paid \$1,000 in fines and costs and was ordered to refrain from abusive contact with his now-ex-wife. After complying with the conditions, the case was discharged in October 2009. Other Village Board candidates are incumbent Don Burroway along with Sara Miller, Jeff Sabbe and Chris Scholl.

Daily Herald (IL)

July 10, 2014

Investigation Clears Carpentersville Official

Author: Madhu Krishnamurthy

An independent investigator looking into allegations of gender discrimination, retaliation and harassment made by a former Carpentersville village employee against Village Manager **J. Mark Rooney** determined there was no validity to the claims. The allegations were made by the village's former human resources director, Linda Mogren, who resigned in May under a separation agreement with the village. At the time, neither village officials nor **Rooney** would discuss the reasons that led to Mogren's departure. Mogren, a village employee since 1998, served as human resources director for nine years. Several attempts to reach her and her attorney were unsuccessful. Mogren refused to cooperate with the investigation citing her severance agreement with the village in which both parties agreed to refrain from disparaging statements. Mogren was assured she would have immunity for any comments made during the investigation, according to independent investigator Dennis Walsh with the legal firm Klein, Thorpe and Jenkins.

The firm previously served as the village's attorney and was chosen to do the investigation because of Walsh's reputation, Village President Ed Ritter said. Walsh interviewed **Rooney** and several other village employees who either witnessed interactions between **Rooney** and Mogren or could speak to the allegations, and reviewed numerous documents of communication between Mogren and **Rooney**, according to documents obtained by the Daily Herald through a public records request.

Among Mogren's allegations were that **Rooney** "had a pattern of replacing women senior staff over 40 years old with males" and that he was trying to force her out after 15 years of service. She also claimed **Rooney** made several threats to physically harm village employees. According to the investigator's report several employees interviewed said **Rooney** would make references to his military service, but never expressly threatened to harm any employees. The police chief also looked into that allegation and determined it was unfounded. The investigation determined **Rooney**, formerly village manager in Wheeling, didn't break any state or federal laws or violate village policy, and acknowledged he is a demanding manager.

Ritter said the report puts an end to the matter. "I have a lot of confidence in our manager, the way he operates and how careful he is in anything that he does involving personnel," Ritter said. Ritter's only comment about Mogren was that she was "an excellent employee." "She chose to leave, and she was not forced to leave. She was a good employee while she was here," he said. Ritter said the village hired the independent investigator only to avoid potential litigation. "We're being proactive," he said. "We did not have to investigate. We could have just left it. But I didn't want to do that because sometimes when you just leave something, it seems like you are afraid to investigate."

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

Daily Herald (IL)

March 22, 2014

Village Postpones Laying Off Firefighters

Author: Lenore T. Adkins

Carpentersville has delayed the planned layoffs of two full-time firefighters while union officials discuss cuts they can make to save those jobs, Village Manager **J. Mark Rooney** said Friday. "I'm very optimistic that the firefighter's union will help us find a solution to avoid the layoffs," **Rooney** said. This action comes after the union met with **Rooney** on Wednesday to discuss the pending layoffs of the firefighters who were originally going to be let go March 28. There are 32 full-time firefighters, and the two at risk of losing their jobs have the least seniority.

Rather than work with a specific dollar amount, the union will instead make cuts from its recent contract and present the proposed savings to **Rooney**. The village board has final say and will vote on the new fiscal year budget April 1.

The extension gives the union time to consider what cutbacks it can take. Three years ago, during contract negotiations, the union agreed to several concessions so the village would not lay off three firefighters. The concessions included reduced holiday pay, no salary increase during the first year of the contract and a reduction in overtime pay. The union last fall agreed to another employment deal, which is what's being reviewed. "We are actively discussing our options with our members," said Lt. Rick Nieves, president of International Association of Fire Fighters Local 4790. "We are happy to see the village extend the timeline."

Last month, **Rooney** announced staff cuts of the two firefighters and three other village employees to help plug a projected \$429,000 deficit. **Rooney** said similar negotiations are also afoot with the union that represents the other three employees. Since the announcement of the layoffs, the firefighter's union has filed a grievance. Also, several firefighters and retired chief John Schuldt have attended various board and budget meetings.

In the aftermath, firefighter Chris Scholl, a Carpentersville resident, publicly questioned whether the village is really in a financial bind and created an online petition to oust **Rooney** over what he calls his "poor management of village affairs."

As of Friday afternoon, 114 people had signed the petition. Scholl said most of them have family members working in the village or are firefighters elsewhere. He said 14 people are from out of state and others are from outside the area, according to information Scholl released to the Daily Herald. **Rooney** said he is aware of the petition and is ignoring it. "It does me no good to study every blog that is ever out there about me," **Rooney** said. "I just never made it a practice to read blogs. And I'm not going to start now."

Daily Herald (IL)

January 9, 2014

Carpentersville Approves Settlement with Firefighters

Author: Lenore T. Adkins

Carpentersville officials approved a contract settlement with the village's full-time firefighters Wednesday — a move that puts to rest the issues between the two parties and gives residents the protection they need without breaking the bank, officials said. In doing so, both parties also avoided settling their disputes through an often lengthy and costly arbitration proceeding. "That would have been the next step had we not come to a resolution," union President Lt. Rick Nieves said. The settlement stipulates that the village use a daily minimum of eight full-time firefighters spread among the three stations; the village previously staffed them according to daily demands.

In exchange, village officials can also use as many part-time firefighters as needed. Other highlights in the settlement include a round-the-clock lieutenant at every station, and the elimination of the village's right to remove fire engines from service when an unusual number of firefighters are absent. In turn, the union agreed to drop the six grievances it filed against the village related to staffing and seniority issues. "We're moving in the right direction; obviously we've got this compromise, and we think it's good for both sides," said Nieves, who could not stop smiling after the vote. "We're looking towards the future." The settlement, meanwhile, is expected to cost the village less than \$50,000 in overtime, Village Manager **J. Mark Rooney** said.

Wednesday's board action came nearly three months after the village and the union agreed to a three-year contract for the 32 full-time firefighters. But several weeks later, the union complained the staffing changes would lead to slower response times that would endanger residents. Village officials, however, said the community was never in jeopardy, and the union actually was upset over the anticipated loss of overtime. The contract, they said, was meant to help curb \$300,000 in overtime expenses. In the ensuing months, the full-time firefighters launched a social media campaign against the new pact, met with a pair of neighborhood groups and with Tom Roeser, an influential businessman and philanthropist. Also in the aftermath, resident Chris Scholl, a full-time Carpentersville firefighter, started a that was critical of the board and of **Rooney**.

At the end of November, the board authorized **Rooney** to request a meeting with the union to resolve the impasse. The interest was in a workforce concentrated on the business at hand, rather than problems on the periphery. "This is an example where compromise should not be a dirty word," **Rooney** said. Wednesday's vote was unanimous, with trustees Paul Humpfer and Pat Schultz absent from the meeting. Village President Ed Ritter heralds the process as a win for everyone and thanks everyone for their willingness to compromise. "We've put some of the biggest disagreements behind us, and we're moving forward cooperatively," Ritter said.

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

Daily Herald (IL)
September 19, 2013

Village Working to Resolve Driveway Issue

Author: Lenore T. Adkins

Business owner Tom Roeser continues to feud with the village of Carpentersville over the brick driveway he installed that violates village code. While brick pavers are a no-no for driveways, they are allowed for patio construction, Village Manager **J. Mark Rooney** said. So if Roeser treats the driveway like a patio, it will comply with village code, **Rooney** said. "I'm not going to make a mountain out of a molehill," **Rooney** said. "If it's not looking like a driveway and it's not acting like a driveway, it's time to move on."

But Roeser, owner of, the village's largest employer, doesn't want a patio; he wants a driveway. And he says he intends to use that property as a driveway instead of playing a game of semantics with the village. "These guys are trying to make a problem go away that they created by calling a duck a swan," Roeser said. "This is not a small issue, and it's not about a driveway. It's about management that is so bad and inconsistent, they make me laugh."

The driveway lies between and the Order of Odd Fellows Lodge. Roeser owns the building that houses Sign-A-Rama. He says he built the grass-friendly driveway to blend in with the nearby residential area. The village rejected his original application for a brick driveway, and the community development department fined his contractor \$150 for building it without a permit.

Roeser caused a stir last month when he complained to the village board about the miscommunication and misinformation he said he received from the community development department on several matters, including the controversial driveway at 3 N. Washington St. He told the board to get more involved in day-to-day operations but stopped short of asking trustees to fire Community Development Director Jim Hock.

In response to complaints from Roeser and others, **Rooney** ordered Hock and several members from that department to attend in-house educational seminars on customer service. Villagewide training on communication and customer service will take place later this month, **Rooney** said. Within the next six to 12 months, trustees could also consider changing the code when they address gravel driveways in the village, **Rooney** said. That, he added, has nothing to do with Roeser's complaint. "It was something that was under consideration for the last year," **Rooney** said. "We don't write laws for one person."

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

Daily Herald (Arlington Heights, IL)
February 8, 2013

1 town suing another over Walmart

Author: Lenore T. Adkins

Although a Kane County judge recently refused to issue a temporary restraining order that would have blocked Walmart from getting money through a special taxing district in Carpentersville, East Dundee will proceed with additional legal action. East Dundee's lawsuit seeks to prevent the retailer from getting any financial incentives from Carpentersville's tax increment finance district. A hearing is scheduled Feb. 14. Walmart plans to close its store in East Dundee and open a Supercenter by 2015 in Carpentersville.

"What the village filed was just asking the judge to make sure that the law is followed as it relates to the TIF and the expenditure of TIF funds," East Dundee Village President Jerald Bartels said. "I would think that Carpentersville would want to make sure all the laws are upheld as well." Carpentersville Village Manager **J. Mark Rooney** says the village knows the law. "The law is very specific on what is allowed and what isn't and we will follow the letter of the law and the spirit of the law," **Rooney** said.

Last year, Walmart said it would close the store in East Dundee to build a larger store at Lake Marian Road and Besinger Drive. Walmart officials did not specify why the Carpentersville location is more attractive. If the project reaches fruition, East Dundee will lose about \$850,000 in annual revenue. The Carpentersville land lies within a TIF district the board created last year to spur development. In a TIF district, property tax levels are frozen for a period of up to 23 years. As redevelopment occurs and the land appreciates, taxes from the increased value are used to pay for improvements or to help defray development costs. East Dundee is pointing to a part of the law that says a business would not qualify for TIF funding if it moves to another TIF district less than 10 miles away in another town. The proposed Walmart would be less than three miles from the East Dundee site, also in a TIF district.

Carpentersville officials accuse East Dundee of stalling the development, of acting prematurely and of wasting their time and money. While Carpentersville is anticipating a TIF request from Walmart, it has not yet happened, said Joe Wade, Carpentersville's assistant village manager in charge of economic development. Wade pointed to a second part of the law that says TIF dollars can be spent in the new location if the old location "contained inadequate space, had become economically obsolete or was no longer a viable location for the retailer or serviceman." "My reaction (to the lawsuit) was why aren't they quoting the full portion of the statute?" Wade asked. Bartels said he would rather wait to see what happens in court. "We'll see what the judge says. (Carpentersville) can make that argument in front of the judge," Bartels said. "Both sides will be heard in court and we'll see where it goes."

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

Courier News (IL)

February 1, 2013

Report Says C’ville Fire Chief Put on Administrative Leave

Author: Mike Danahey

Village Fire Chief John Schuldt has been put on administrative leave, according to a Chicago radio report. WBBM News Radio reported Thursday morning that Schuldt had been put on leave and that Village Manager **Mark Rooney** would not comment as to why the move had been made. Village President Ed Ritter told The Courier-News Thursday morning that he had received several calls about the report but he could neither confirm nor deny it. He referred calls to **Rooney’s** office. **Rooney** was not available for comment, and his office also would neither confirm nor deny the reports. Schuldt was not in his office Thursday morning and could not immediately be reached for comment.

The Illinois Fire Chiefs Association named Schuldt, 52, the Illinois Fire Chief of the Year for 2011 from among departments with a population of more than 25,000. Schuldt was nominated for the award by Assistant Fire Chief John Skillman. At the time, Skillman told The Courier-News that Schuldt had been with the department for 34 years, including 31 in a full-time role. Schuldt was named chief in 1996 and has served with fire safety organizations on the state and even the national level, Skillman said. Skillman noted in his nomination that “in May 2001, Chief Schuldt was asked by his village board to serve as acting village manager. He faced several key village staff positions that were vacant and the need to develop a village budget, at the time \$40 million. He was responsible for a staff of 300 people during his 12 months as acting manager until his return to fire chief in May 2002. He was asked to stay in the position, but his love for the fire service returned him to his chief’s position.”

In the community, Skillman noted, Schuldt was on the founding board of the local Boys & Girls Club in the 1990s. Schuldt served on a 2010 committee that brought the Healing Field to Carpentersville to honor war heroes. Since 1998, he has participated in a community-wide paint-a-thon in which volunteers’ paint homes of those unable to do so. He helped coordinate area fire departments’ sending of help to victims of the 2004 Utica tornado and Hurricane Katrina in 2005. In 2010, when a local family was left homeless by a fire, Schuldt worked first to solicit donations of furniture and clothing the family needed and then worked with the owner of a storage facility to create a permanent cache of such items for future fire victims. Schuldt helped bring “Remembering When,” a fire- and fall-prevention program for older adults, to Carpentersville as a pilot project and was instrumental in setting up a division technical rescue team for the area.

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

The Northwest Herald (IL)

August 28, 2012

Lawsuit Claims Brutality, Racism in Carpentersville

Author: Lawrence Synett

A Crystal Lake man has filed a civil lawsuit against the village of Carpentersville and its police department, claiming that he was battered and racially mistreated during a traffic stop last year. Johnny Perez, 21, is seeking more than \$50,000 in damages in relation to an incident more than a year ago when Officer Alan Webb arrested him for misdemeanor resisting a peace officer and aggravated battery, according to the lawsuit filed in Kane County earlier this month. The 12-count lawsuit against the city and its police officers alleges that Perez was physically and verbally abused during a traffic stop March 16, 2011, on Route 25. It also states that the village's nonbinding resolution to make English its official language gives police a license to discriminate against Spanish-speaking people. Perez was pulled over that day by a member of the Carpentersville Police Department for driving 5 mph over the posted speed limit, the lawsuit states. He then was asked to step out of the vehicle to read the speed limit sign and return to the car before Webb and several other officers arrived. According to the lawsuit, Perez again was asked to exit his vehicle by Webb and was shoved in the chest. Webb punched him twice in the face, kned him and struck him in the back of the head. Other officers held Perez while the abuse occurred, his lawsuit states. The officers also shouted racial slurs and verbally threatened Perez, a U.S. citizen who speaks Spanish and English, the lawsuit states. He suffered bruising on his face and body.

The charges later were dismissed, court records show. Perez was treated for bruises to his face and body at Centegra Hospital – McHenry, which cost \$3,000 in medical bills, according to the lawsuit. Carpentersville Village Board members approved making English the official language in June 2007. At the time, proponents said it would strengthen the village and save taxpayers' money. Others argued that it would make the village a more difficult place to do business. Latinos make up more than 44 percent of the village population, according to 2010 Census data. The lawsuit alleges that resolution "was the product of pervasive racism of the village government, and some village residents against individuals of Mexican descent." "Police officers were permitted and emboldened by the village's institutional racism to use force against individuals of Mexican descent at a frequency disproportionate to their use of force against other individuals," the lawsuit states.

The counts include civil-rights violations, false arrest and imprisonment, physical abuse, unlawful search and deprivation of liberty, excessive force, civil conspiracy, and assault and battery, among others. The lawsuit also accuses Webb of lying in the subsequent police report by making it out as though Perez was the aggressor. That includes Perez yelling and bumping Webb, as well as refusing to be handcuffed. Carpentersville Village Manager **Mark Rooney** said the village had not been served the lawsuit as of Tuesday afternoon, and could not comment on any litigation.

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

Daily Herald (Arlington Heights, IL)
January 3, 2012

Carpentersville lays off two department heads

Author: Lenore T. Adkins

This marks the final week for a pair of Carpentersville department heads. Officials have laid off Engineer Scott Marquardt and Economic Development Director/Special Projects Coordinator Janice Murphy, both of whom have worked with the village for about a half dozen years. Details of their severance agreements were not available Monday.

Also this week, the village board will consider whether to furnish Village Manager **J. Mark Rooney** with a small raise and additional perks. The village made the decision to eliminate Marquardt and Murphy this fall, citing rising fuel and health insurance costs and the pay increases for the four unions that negotiated small raises last year, Village President Ed Ritter said. In the end, officials decided they could merge Murphy's responsibilities with another department and realized there wouldn't be enough projects to justify Marquardt's continued employment. "It's very hard," Ritter said. "We had to think long and hard about it because they were good employees and they did some important things for the village. But in today's reality, you have to cover your expenses and you have to make sure you can cover them." Assistant Village Manager Steven Jones will absorb Murphy's duties, while the rest of the engineering staff will take on Marquardt's work and hire outside contractors as needed. Eliminating the two jobs saves a combined \$229,779, according to Finance Director Lisa Happ.

Meanwhile, **Rooney** is up for a raise and additional perks — his reward for a job well done, officials said. Tonight the village board will vote on whether to increase **Rooney's** salary from \$130,000 to \$132,600, his monthly vehicle stipend from \$300 to \$500 and whether to cover his life insurance policy. The adjustments would be effective in August. **Rooney** has been village manager since September 2010, and the board completed his review and evaluation late last month. Ritter gave **Rooney** high marks for his leadership skills, for improving customer service at every level and for streamlining village operations. "He's done a really good job of reorganizing village hall and working at a lot of cost-saving things, and we've been very happy with his service so far," Ritter said. "There were some things he originally asked for (when he was hired) and we said we can't do it, but if things went well, when next year came around, we'd add a couple of things to his contract."

Trustee Kay Teeter said **Rooney** took on a difficult job, and without the cuts and other cost-savings measures he instituted residents probably would be facing higher property taxes. "We're not giving him everything that he could be asking for, but we are basically rewarding him," Teeter said. "He was given a tough job when he came in, and he has really stepped up to the plate." **Rooney**, a member of the U.S. Army Reserves, could not be reached for comment due to a training obligation with the organization.

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

Daily Herald (IL)
November 7, 2011

Carpentersville Wins Award for Labor Negotiations

Author: Lenore T. Adkins

The Illinois Public Employer Labor Relations Association has recognized Carpentersville for its four contract negotiations in 2011 that saved hundreds of thousands of dollars, avoided layoffs and kept public services intact. The village received the Rosemont-based association's James Baird Leadership Award, which notes "leadership and achievement" in Illinois public sector labor relations. "The IPELRA board has determined that Carpentersville's labor relations efforts ... are positive contributions to the Illinois public sector labor relations field," Awards Committee chairwoman Mary Rath wrote in her congratulatory letter to the village.

The village this year negotiated four, three-year contracts with unions representing firefighters, police officers, police sergeants and public works employees. But it was the talks with the fire department that set the tone for how the other three sessions went, Village Manager **J. Mark Rooney** said. The firefighters' union accepted smaller pay increases and other concessions that saved the village \$192,640, and agreed to hold contract negotiations without an attorney. "It gave some level of trust and probably assurance that policemen could do the same," **Rooney** said, adding that the village also kept attorneys out of the mix until the very end. "(Attorneys) didn't come to the table; that was just kind of an email and a conference call situation."

Rick Nieves, president of the firefighters' union, said the union also kept the taxpayers and their struggles in mind during the negotiations. "It's not just about us; it's about the public," Nieves said. "What we do is public service. It's tough now; everybody's struggling economically." In the end, after the firefighter's contract was ratified, the other unions agreed to smaller raises and other cutbacks. Last year, the village's dire financial situation resulted in the layoffs of five public works employees, two employees from the community development department and a part-time information technology worker, said Linda Mogren, director of the human resources. She also is the liaison between the union representatives and the village. "When we learned what the economic picture was, we worked hard to work with the unions and we felt that we both came to the table with some good compromises, so we felt very good about the results," Mogren said. Carpentersville officials are in the middle of negotiating contracts with unions representing part-time firefighters and civilian employees that include building inspectors, clerks and code enforcement officers. They hope those go as smoothly as the others. James Powers, the village's labor attorney, nominated Carpentersville for the award and Carpentersville Fire Chief John Schuldt accepted the award. He presented it to the village board last week. It marks the first time Carpentersville has received the recognition. "I think it shows the effort that was put in by the village and the unions," Schuldt said. "The village coming together and negotiating four successful contracts that reduced overall expenses, without laying anybody off in those units, I think that was remarkable."

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

Courier News (IL)

October 30, 2011

Injured Cop Sues C'ville for Health Insurance Coverage

Author: Mike Danahey

Former village police Officer Joseph Cecala is suing the village, Village Manager **Mark Rooney** and village human resources Director Linda Mogren for health insurance benefits for himself and his family he feels are owed him under Illinois law. Cecala, 40, was injured Dec. 29, 2008, while on duty at the scene of an accident at Route 31 and Spruce Road. According to the lawsuit, a driver had knocked down a tree that led to a traffic signal falling onto Route 31. Believing the situation to be an emergency and that, due to the hour, no help would come for several hours to remove the signal, Cecala and another officer moved the item off the road. In the process, Cecala injured his back in what the lawsuit calls a “catastrophic injury.” In November 2010, Cecala, the married father of two children, was awarded an in-the-line-of-duty disability pension by the village’s police pension board that went into effect that December. That month, he applied to the village for health insurance benefits he felt were his under the state’s Public Safety Employee Benefits Act (PSEBA).

The act states if a police officer suffers a catastrophic injury or is killed in the line of duty, his employer shall pay the entire premium of the employer’s health insurance plan for the injured employee, the injured employee’s spouse, and for each dependent child of the injured employee until the child reaches the age of majority or until the end of the calendar year in which the child reaches the age of 25 if the child continues to be a dependent. To be covered under the act, the injury or death must have resulted from the officer’s response to fresh pursuit or is reasonably believed to be an emergency, an unlawful act by another, or during the investigation of a crime. The lawsuit includes a copy of a Dec. 9, 2010, letter from Mogren to Cecala’s attorney, Ryan Theriault, stating that Cecala does not qualify for benefits under PSEBA. “In particular, his injury did not occur as a result of any of the circumstances enumerated in (the act).

Consequently, Officer Cecala’s application for receipt of benefits is denied. Officer Cecala is eligible for insurance coverage as a retiree under the Illinois Insurance Code provisions relating to police officers. If Officer Cecala elects and pays the total cost of such coverage, the benefits will be available as of January 1, 2011,” the letter states.

Theriault is an attorney at Foote, Meyers, Mielke and Flowers in St. Charles. He said that Cecala currently is covered under the policy his wife has at her job. The suit seeks reimbursement for \$212 per month since December 2010 for those premiums. “This lawsuit has been filed to force the village to uphold its legal obligation to provide health insurance to police officers who are catastrophically injured in the line of duty,” Theriault said Friday. The village, he said, “has intentionally chosen to turn its back on an officer and his family who sustained career-ending injuries as the result of his dedicated service to the village and the people of Carpentersville.”

Rooney was out of the office Friday and could not be reached for comment.

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

Daily Herald (IL)
November 11, 2010

Carpentersville Officials Weighing Higher Levy

Author: Tara García Mathewson

What looks like bad news for taxpayers is, at the same time, a village trying to keep its income steady — or at least, stem its losses. At Carpentersville's Audit and Finance committee meeting Wednesday night, the village manager and finance director presented recommendations for next year's levy. Last year, the village asked for — and received — about \$10.2 million in the levy. This year, the board must decide if it wants to ask for the same amount and end up with \$1.1 million less in the budget because of decreasing assessed values, or ask for a little more.

The village manager, **Mark Rooney**, is suggesting the board request almost \$10.9 million to keep the budget losses at just more than \$400,000. Both options will mean a tax rate increase for residents. "Are we going to reduce revenues or increase taxes? I have a feeling we're going to have to raise our tax rates, but we're not going to raise any more money," said Ed Ritter, Carpentersville village president. **Rooney's** recommendation would mean a 15 percent increase in the tax rate over last year, though that will likely not increase individual taxpayers' bills by much.

The Audit and Finance committee did not make a formal recommendation to the board, but Paul Lanspa and David High, the only two members who would not be voting on the levy as trustees, both endorsed **Rooney's** recommendation. "I don't want to pay any more, but it's not egregious," Lanspa conceded.

The board will decide on the levy at its Dec. 7 meeting where the public can comment. To access the PowerPoint presentation with information about the village's revenues and the various levy options to be discussed by the board, residents can go to the village website at vil.carpentersville.il.us. On the home page, there is a link called "Village Board Presentation: 2011/2012 Budget."

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

Courier News (IL)
September 2, 2010

Former Wheeling Manager is Hired by Carpentersville

Author: Jacob Hurwith

After extensive interviews and lengthy debate over which of 48 candidates would fit the position of village manager, trustees decided to go with the one they say has the most experience and professionalism. **Mark Rooney**, a former village manager in Wheeling, was chosen for the job Tuesday night. He will start on Sept. 21. **Rooney** served as Wheeling village manager from 2006 to 2009 and was the assistant manager for three years before that.

While in Wheeling, which has a population of about 40,300, he helped implement two new tax increment financing districts and extended a third TIF district, something familiar to the village of Carpentersville. **Rooney** also helped maintain Wheeling's AA+ Fitch Investor Services and S&P AA bond rating in addition to helping raise \$40 million in bond debt to construct new municipal facilities.

Carpentersville officials said that experience will come in handy as the village begins to build a new public works facility. **Rooney** is a lieutenant colonel in the U.S. Army Reserves and was a senior adviser for the Army's Military Transition Team, where he trained and mentored two separate Iraqi regiments composed of 900 Iraqi soldiers. **Rooney**, 50, will be paid an annual salary of \$130,000. He said he is looking forward to getting to know village staff. "I'm excited to do more listening than talking," **Rooney** said. "I want to learn the specifics and the intricacies of how Carpentersville functions. The formal structure is important, but the informal structure is just as important."

Rooney hold a master's degree in public administration from Northern Illinois University. He enlisted in the Army immediately after earning his degree and served in Saudi Arabia, Iraq and Kuwait. He later went to work as a staff assistant for the now-late U.S. Sen. Paul Simon, helping facilitate the passage of legislation that resulted in the redevelopment of Joliet Arsenal, Fort Sheridan and Glenview Naval Air Station. Simon "taught me the greatest lesson," **Rooney** said. "Disagree without being disagreeable is the quality you have to have to be in public service."

Rooney will take over from Assistant Village Manager Dawn Wucki-Rossbach, whom the board praised for her work since the retirement of former manager Craig Anderson earlier this year. "We made a great choice, and I am happy for the residents of Carpentersville," Trustee Brad McFeggan said. "He will lead us in the right direction and the direction we need."

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

Daily Herald (IL)
September 24, 2009

Village Leader is Out

Author: Madhu Krishnamurthy

Wheeling Village Manager **J. Mark Rooney** has resigned his post as of Wednesday, Village President Judy Abruscato confirmed Wednesday night. Two trustees say **Rooney's** departure was imminent after a majority of the board indicated in closed session Monday that they no longer supported him. Abruscato did not confirm that but would not offer an explanation for his departure. She said the village board is grateful to **Rooney** because under his leadership a new village hall, fire station and public works facility were built, and the staff and board successfully negotiated police and fire union contracts. "The village board wishes **Mark** the best in his career," Abruscato said. "There are no problems with **Mr. Rooney**."

Assistant Village Manager Jon Sfondilis has been designated acting village manager, and he will remain in that post for the foreseeable future, said Martin Seay, administrative assistant. **Rooney** declined to comment Wednesday, directing all questions to Abruscato. He joined Wheeling in 2003 as assistant village manager and was named acting village manager in December 2006 when then-manager Wally Douthwaite resigned. **Rooney** was named manager in February 2007. Before Wheeling, he was city administrator in Highwood.

Trustees Pat Horcher and Dean Argiris said that in a poll taken Monday night among the six trustees and Abruscato, **Rooney** had lost the support of five of them. Neither Argiris nor Horcher would fully explain what caused **Rooney's** loss of favor. They said Horcher and Robert Heer supported **Rooney** staying, while Argiris, Abruscato, Ken Brady, Dave Vogel and Ray Lang did not. "Most of what happened in my mind was politics and clash of personalities, really," Horcher said.

Horcher said some trustees complained **Rooney** did not keep them fully informed about village business. "They were basically not liking the way he was managing the village," Horcher said. Argiris, meanwhile, disagreed **Rooney's** departure was political. "It wasn't about personality conflicts and it wasn't about politics," Argiris said. "There were issues. This was a business decision by a majority of the board."

Argiris said the problems have been going on for more than a year, but he would not divulge the actual reasons why **Rooney** was leaving. He said it was not because of any illegal actions or financial mismanagement. "I believe it was hurting the village keeping him on and that's why we need to move on," Argiris said. "His style ... the way he would do business, eventually it would hurt the village, if it hadn't already. And these were issues that never seemed to be going away. They needed to be addressed." Argiris said he has a high opinion of **Rooney** and was an advocate of hiring him at first, but he said **Rooney** was "jeopardizing things." Horcher, meanwhile, believes **Rooney** has been one of Wheeling's best managers. "Look at what got done under this guy," he said. "We built the public works building and the village hall. We finally

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

finished the space study for the village. He managed two police and fire contract negotiations without going into arbitration. "The guy did a really good job. He was dedicated to this village." A lieutenant colonel with the U.S. Army Reserve, **Rooney** served 18 months in Iraq while he was Wheeling's assistant village manager. **Rooney's** \$140,000 salary for this year was frozen last November in a joint decision he made with the village board. The terms of his departure are still being worked out, Seay said.

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

Wheeling Countryside (IL)

February 28, 2008

Rooney Gets 12 Percent Raise

Author: Kit Kadlec

A year after he was hired to be village manager, **Mark Rooney** was given a \$15,000 raise last week. Previously making \$125,000, he will now receive an annual salary of \$140,000, or 12 percent more, under a resolution signed and put into effect Feb. 19. **Rooney** was hired as village manager on Feb. 26 last year, after first serving as the village's acting manager. In becoming manager, he replaced Wallace Douthwaite, who resigned in December 2006.

In unanimously approving the raise, which was tied to a performance review, no trustees made a comment during the Village Board meeting. Reached after the meeting, Acting Village President Patrick Horcher said he and others had been pleased with how **Rooney** has done in his first year. "I think everybody is pretty happy," he said. "We've had a lot going on, and he's handled it well." **Rooney** is Wheeling's seventh village manager since it adopted the board/manager style of government in 1970. He first joined the village staff in 2003 as an assistant village manager. In 2005, as an Army reservist, **Rooney** was called into active duty and sent to Iraq. He trained soldiers for the new Iraqi army, then returned 15 months later.

Des Plaines Times (IL)

December 13, 2007

Wheeling Manager Responds to Prospect Heights Criticism

Author: Charles Berman

Four days after the city of Prospect Heights and the village of Wheeling came together to appoint the new chairman of the Chicago Executive Airport, bad blood between the two municipalities continued to boil over. The hiring of former United Airlines pilot E. Allan Englehardt was supposed to signal a new era in leadership of the airport, formerly known as Palwaukee Municipal Airport.

Recent board meetings have focused on future airport business, not the alleged misconduct of former board Chairman Kevin Dohm and Vice Chairman L. James Wylie. Both leaders resigned within a one-month span earlier this year after concerns were raised regarding the payment of an airport contractor that was never approved by the board. On the surface, it appeared that the Airport Board moved on from those allegations, or at least kept its ongoing investigation and now apparent feud behind closed-session doors.

However, on Dec. 5, a letter attributed to five Prospect Heights aldermen was sent to Acting Wheeling President Judy Abruscato. The letter accuses Wheeling Village Manager **Mark Rooney** of sidestepping the board in an attempt to seek Federal Aviation Administration approval to build a Wheeling fire station on airport property. "It has come to our attention that since September, **Mr. Rooney** has ignored our collective understanding and pursued a course of conduct which mirrors the very conduct he complained about in the Fall," the Prospect Heights officials wrote.

The letter, which made it to the news media before Wheeling's Village Hall, also claims that **Rooney**, who sits on the Airport Board, threatened Airport Manager Dennis Rouleau's job for not obtaining the FAA's consent. "**Mr. Rooney's** conduct hurts airport morale and the important relationship of the City and the Village as partners in the ownership of the airport," the Prospect Heights officials wrote.

'Nothing to hide'

Rooney adamantly denies all of Prospect Heights' charges. Before the Dec. 10 Wheeling Village Board meeting, he presented a litany of evidence, including e-mails, that he said proves he did not overstep his authority. "Prospect Heights is questioning my integrity," he said. "I have nothing to hide. "They are baseless and meaningless allegations. Now we'll have full disclosure of what's gone on (at the airport). You'll see I don't lie, cheat or steal and I don't tolerate those who do. "My job is to protect Wheeling's assets, including the airport."

Wheeling has been planning to build two new fire stations because the village's Police Department is taking over the entire building that police currently share with the Fire Department and Village Hall. To avoid the problems that the Alexander Graham Bell Montessori School

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

faced in trying to build a school in a runway zone, **Rooney** said he wanted to at least know if it was usable land before recommending any location. **Rooney** said he never received that answer, so there were never any real plans to build on that property.

Abruscato surprised

The letter came as a surprise to Wheeling officials. Abruscato said the two municipalities met last week to discuss lingering issues and that the two sides left the sit-down on a positive note. Abruscato said she supports **Rooney** and does not believe he did anything inappropriate. "**Mr. Rooney** does a good job fulfilling the direction of the Wheeling board," she said. "That was poor judgment by Prospect Heights," she added. "They should have sent me the letter before going to the press. That makes for a bad relationship."

'Positive' chairman

E. Allan Englehardt will officially take over the chairmanship of the Chicago Executive Airport Wednesday (Dec. 19) when he leads the board's next meeting. "I've been around this airport for a long time, and I want to do everything I can to see the airport get back on track," said Englehardt, who was appointed Dec. 1.

The 60-year-old former United Airlines pilot started as a flight instructor at Palwaukee 40 years ago. He retired as a Boeing 777 international captain on Feb. 1, but he still trains and certifies new pilots. Englehardt said it's not his place to comment on the tumultuous last few months at the airport, and he is focused on reaching the airport's full potential for all users. "I am a positive person and I see things continuing to spin that way," he said.

Rouleau spent last week showing Englehardt around the airport and brought him up to speed with ongoing airport business, good and bad. "He is very aware of the past," Rouleau said. "He is going to work to get everybody back on the same page. "I see us working past it. There are a lot of people who love this airport and when it comes down to it, people will roll up their sleeves and get back to business." Rouleau said Englehardt was an excellent choice. "He's very energetic, he understands the position and he will be a tremendous asset to the board of directors."

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

Wheeling Countryside (IL)

March 8, 2007

Wheeling Drops 'Acting' from Rooney's Job Title

Author: Casey Moffitt

The Wheeling Village Board gave **Mark Rooney** 90 days as the village's acting manager as an audition to the permanent role. However, **Rooney** impressed trustees so quickly, they gave him the job nearly a month early. **Rooney** was officially hired as Wheeling's village manager during the board's Feb. 26 meeting. Trustees voted unanimously on the decision. "I just want to say, 'Thanks,' for the last two months," **Rooney** said after the vote. "I've had a great deal of satisfaction working with the staff and the board." **Rooney** replaces Wallace Douthwaite, who resigned in December. His contract was bought out at the end of that month. Since then, **Rooney** has been the acting village manager.

Local knowledge

Village President Greg Klatecki said **Rooney** is very knowledgeable about the issues in the village, and showed an aggressive edge while performing as acting village manager. "It makes the transition a lot easier," Klatecki said of the hire. "He is aware of most everything going on in the village." Klatecki said if the Village Board were to search for a new village manager, it could easily have taken six months, and then that person would have acclimated himself or herself to the issues in the village. As village officials are working on redevelopment projects, building a new village hall and two fire stations, along with other projects, Klatecki said a long transition is not in the best interest of the village. "We would end up in a lull waiting through the transition," he said. "Everything is falling into place and we don't want that momentum to stop."

'Personality fits'

Other trustees also praised **Rooney's** work over the past few months as acting village manager. "His personality fits the timing," Trustee Dean Argiris said. "It takes good leadership to get things done. I see the attitude changing at Village Hall. He comes with leadership." "We need to continue to work as a team," Trustee Bob Heer said. "This hiring makes us proud." **Rooney** first joined the village staff in 2003 as assistant village manager. As an Army reservist, **Rooney** was called into active duty in 2005. He was sent to Iraq where he trained soldiers for the new Iraqi army. He spent 15 months in active duty. "What a country," **Rooney** said. "I was gone for 15 months, and the Village Board still has the confidence in me to work for the village." **Rooney** was previously the city administrator for Highwood, where he worked for seven years. His tenure there was marked by the conversion of Fort Sheridan to civilian uses. **Rooney** becomes Wheeling's seventh village manager since the village adopted the board/manager style of government in 1970.

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

Daily Herald (IL)
December 19, 2006

Wheeling Board Names Acting Village Manager

Author: Sue Ter Maat

The Wheeling village board Monday formally appointed an acting village manager to temporarily replace the current manager, who handed in his resignation last week. **J. Mark Rooney**, who was the assistant village manager, was designated as acting village manager, and he presided as such during the meeting.

The board also accepted the resignation of Wally Douthwaite, who was not present at the meeting. Last week, Douthwaite put in his resignation. He will remain with the village until the end of the year to tie up loose ends on projects he was working on, village officials said.

Douthwaite has declined to comment on his resignation. Some board members had hoped Douthwaite would've continued as village manager. Trustee Judy Abruscato said she was sad to see him go. "I thought he did a good job," she said.

Douthwaite was city manager of Des Plaines until 2001. He left the city to take a job as city manager in Springboro, Ohio. Douthwaite, 53, was hired as Wheeling's village manager in September 2002 after a seven-month search to fill the position. **Rooney** may become the village manager after a three-month trial. The board will decide to promote him or look for a new manager after that time. Before coming to Wheeling, **Rooney** was the city manager of Highwood.

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

Glencoe News (IL)
November 10, 2005

For Rooney in Iraq, Thoughts Will Turn to Veterans Day

Author: Kenneth L. R. Patchen

For Lt. Col. **Mark Rooney**, a former city administrator for Highwood who is now in Baghdad, Veterans Day offers a chance to consider anew the meaning of ceremonies intended to honor armed forces personnel. He has more time to think about remembrance these days. With a more normal schedule than he had in July when located near Tal Afar in northwestern Iraq, **Rooney** now is part of a group of 100 American soldiers working with 15,000 Iraqis. No longer assigned to improve water and sewage treatment plants, he is an adviser for Iraqi soldiers working in Taji to protect their country. Each day he is training and advising a regiment of 800 soldiers. "I think every day is getting better," he said.

Rooney's family lives at Town of Fort Sheridan. In March, 2003, he left Highwood to work as assistant village manager in Wheeling. A year later, he was called to serve in Iraq. While working in Highwood, he would take his children to participate in ceremonies sponsored by Highwood American Legion Post 501 to honor armed forces personnel. "You think about (Veterans Day) here more than you do there," **Rooney** said.

For many people, Veterans Day is a singular holiday of remembrance, he said, whereas in a war zone, it's more common to think of those who have died at any time of the day or year. In either case, both in a war zone or at home, a time of remembrance is not a time of enjoyment. "It's a traumatic event for those who have seen something," he said. On the home front, he said, "The families of deployed soldiers are unduly stressed."

Spouses live every day with the responsibility to maintain a household and to raise children. At any time, a military representative in dress greens may knock on the door with news that their life as they knew it is now over and the children have lost a parent. **Rooney** said this can create a tougher year for those left behind than for those who are deployed. Karen **Rooney**, taking care of their three children, agrees that explaining their life can be difficult. "It really is tough," she said. "It's hard to explain to (children)."

Veterans Day, she said, can be a time for people to remember those who are left at home while a spouse or child serves overseas. The focus can include those who were or are in the armed forces and their families. **Rooney** sees differences between the experience of World War II and Desert Storm veterans which is reflected in how they may view an occasion such as Veterans Day. World War II soldiers had cohesive units and a more common experience with one another and could share their experiences among themselves. That is not the pattern for today's soldier. **Rooney** has served in both Gulf War invasions and said the battlefield experience is different for a modern soldier. Military service is much more technological and specialized than it was I World War II. These days, some personnel do not see gunfire so that alone creates a difference among armed forces personnel in the same war. For example, his own experience in the past

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

three months has exposed him to more gun fire than in previous assignments there. "(Service here is) violent, but not really as violent as portrayed in the media," he said. "The Gulf War was, in retrospect, a very easy operation. This one is much tougher. Operations (such as) fighting insurgents are never easy." He is comfortable serving in Iraq. "I'm not troubled by anything I've seen or done," he said. "The part that helps me is that I know what the mission is." He is helping Iraqi soldiers protect their country. He said many citizens there have a lot of motivation to make things better and adopt change. "The Iraqi soldiers are fighting and dying for their country here a lot more than the media portray," **Rooney** said. "It's good they're doing it. It's their country."

Daily Herald (IL)

June 26, 2004

Wheeling Could Benefit Twice from Federal Flood-Control Plan

Author: Avian Carrasquillo

Wheeling's decision to take part in a federal flood mitigation program has economic implications for the town center, businesses and local homeowners, village officials say. The Army Corps of Engineers and the Illinois Department of Natural Resources are working with communities throughout the state on six projects meant to curb flooding in Illinois.

Wheeling holds a major stake in one of those projects, known as Levee 37, which calls for a Buffalo Creek reservoir expansion. The project calls for obtaining another 476 acre-feet (the amount of water required to cover 1 acre with 1 foot of water) of water storage at additional sites in Wheeling. Assistant Village Manager **Mark Rooney** said Wheeling's interest in this project is to protect existing businesses and houses from flooding. But he added Wheeling has a secondary goal of economic redevelopment of the downtown and Metra train station areas in mind with this project.

Rooney said development cannot occur in a heavy flood plain. Areas where homes and businesses exist in a flood plain were built before any study identified them as being in a flood plain, but it could affect future development there. "It's very expensive, if not impossible, to get permits to rebuild and build new things (in a flood plain) without this program," he said. "The federal project is a win-win situation as we see it in Wheeling," **Rooney** added.

Of the 33 sites being considered for water storage throughout the area, only two would be in Wheeling. One of the more visible sites is at the Wheeling Park District, 333 W. Dundee Road, where 205 acre-feet would be used. The other site identified is in the northwest corner of Wheeling on farm land. **Rooney** said the site would not be a detention pond, but would be designed to hold small amounts of water from the Des Plaines River when it overflowed until it subsided, and would not be enough to do any damage.

Jan Buchs, executive director of the Wheeling Park District said the park district will take a serious look at the federal plan. "We're excited to explore future opportunities to continue the future development of the park district," she said. The project would be federally funded and could be ready to break ground as early as fall 2005, **Rooney** estimated.

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

Daily Herald (IL)

October 23, 2003

Wheeling Sues to Acquire Property for Redevelopment

Author: Matt Arado

The village of Wheeling has filed a condemnation lawsuit against the owners of property on North Milwaukee Avenue in an effort to facilitate redevelopment of the area. The village is trying to acquire the property at 597 N. Milwaukee Ave., now home to a warehouse building and a used car dealership. The property owners could not be reached for comment. The property sits in a tax increment financing district the village established in February near the intersection of Milwaukee Avenue and Lake-Cook Road.

Wheeling officials would like to join the property with other parcels just to the north, forming a 20-acre site that could then be developed with shops and other commercial outlets. The village is negotiating purchase prices with the other property owners. "We believe commercial is the best use for that land," Assistant Village Manager **Mark Rooney** said. "A strong commercial area would be to the betterment of the entire community."

A TIF district is a redevelopment tool that allows towns to freeze property tax levels in a designated area for up to 23 years. As the value of the property rises, property owners in the district pay taxes as usual, but towns can use the amount paid above and beyond the frozen levels to cover redevelopment costs.

Wheeling now has three active TIF districts. In addition to the North Milwaukee-Lake-Cook Road area, there is a TIF district near the intersection of Dundee Road and Milwaukee Avenue and one further south on Milwaukee near Hintz Road. Next month, the village will hold a public hearing on a proposed fourth TIF district, which would be located around the Metra train tracks across Dundee Road. That hearing will be held Nov. 10. All of the redevelopment efforts are designed to give Wheeling a strong commercial tax base and improve the village's image.

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

Daily Herald (IL)

March 3, 2003

Village Works to Fill Out Staff in Top Spots

Author: Cass Cliatt

A year ago, Wheeling trustees tried to steer the village toward improvement, but with a shortage of hands to work the helm. The vacancies in Wheeling's top village staff began to mount. Now, the village is about finished amassing the administrative muscle it needs to push toward upgrading Wheeling's image, with the latest hire of a new assistant village manager.

J. Mark Rooney, the city administrator of Highwood, has been named Wheeling's new assistant village manager. "The volume of work here is such that we need two people to not only handle the day-to-day business, but also keep an eye on the bigger picture - being, where the village is going long term," Village Manager Wally Douthwaite said. If the village manager has to focus on such things as reviewing liquor licensing fees, he'll be distracted from "what are we doing downtown, what are we doing with a Kmart lease, what are we doing with a transit study," Douthwaite said.

Rooney, 43, will coordinate Wheeling's three redevelopment districts, negotiate the renewal of Wheeling's waste contract and manage special projects. He served seven years as Highwood's administrator and will fill a position left vacant in February 2002 when former Assistant Village Manager James Grabowski temporarily stepped in to fill Wheeling's top executive position.

That job was left empty by the dismissal of former Village Manager Craig Anderson, which later added to vacancies at the top of Wheeling's public works, community development, airport management and village attorney divisions. All of those vacant positions are now full. Wheeling is interviewing to fill a newly created position of public relations coordinator to be more efficient in informing residents of village news, Douthwaite said. The new staff member also will work with the Wheeling Special Events Commission on publicizing the annual Taste of Wheeling and other events.

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

Highland Park News (IL)

June 24, 1999

Highwood Cops Say City Dragging its Feet

Author: Kenneth L. R. Patchen

The Metropolitan Alliance of Police has filed an unfair labor relations practice complaint with the Illinois State Labor Relations Board against the City of Highwood on behalf of Highwood Police Officers. As of Tuesday afternoon, village officials and city contract negotiators had yet to receive notification of the filing and were unable to discuss the charges contained in it. City Administrator **Mark Rooney** said he expected the contract negotiations to take place during the first week of July. Negotiations had been set for that time because attorneys for both sides would be able to meet at that time. Union attorney John Rossi said that a draft contract for Highwood Police Officers had been submitted to the city in late April or early May. The city had expressed a desire for more and more time to review the language of the contract.

During the week of June 7, the union filed an unfair labor relations practice charge with the Illinois State Labor Relations Board, according to Rossi. Highwood Police union President Jeff Neimark expressed optimism about the ultimate outcome of negotiations between the union and city. "The future definitely looks optimistic, especially because of state labor laws in place." Highwood Police Officers voted to be represented by the Metropolitan Alliance of Police in March. At that time, City Administrator **Mark Rooney** had said, "We will negotiate in good faith if they decide to have a union or if they don't." Incorporated in 1984, MAP is made up of sworn police officers up to the rank of lieutenant and civilian employees who work full or part-time with state, county, or municipal law enforcement agencies. MAP officials have stated that their union is concerned with the ideals of police professionalism. In the past, Highwood union officials have expressed "The future definitely looks optimistic, especially because of state labor laws in place. Concern about overtime pay, scheduling, and the amount of turn-around time between work shifts.

Union officials have expressed additional concerns. "We're hoping for fire-arms training. We haven't had it for several years and (it is) a mandate of federal law," Neimark said. Neimark also said that regular pursuit training is needed for officers. "It is also mandated by federal law." "Basically we want to solidify our benefits," he said. There is a concern about salary, according to Neimark. He said he expects the police department union contract to benefit the city. A negotiated agreement will lead to better police equipment and better additional training. "It is one of the things that will help us and the city down the road." Negotiations on a contract between the city and union were initially delayed last summer when the city claimed it did not have enough employees to meet eligibility requirements for cities that can negotiate with unions. Highwood argued that on-call firefighters are independent contractors and should not be included in personnel counts. That argument was not accepted and the city was told to negotiate with the new police union. "We're very optimistic," Neimark said. "We're going to move ahead."

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

Highland Park News (IL)

July 24, 1997

Rooney Called Up to Serve Tour in Bosnia

Author: Steve Zalusky

The U.S. Army will get to see two sides of Highwood City Administrator **Mark Rooney** this month.

HIGHWOOD

On Wednesday, **Rooney**, who is in the Army reserve, will be called up for a brief tour of duty that includes trips to Germany, Hungary and Sarajevo, the former capital of Yugoslavia. By the end of the month, though, **Rooney** will travel to Washington, this time to wrangle with the Army as he takes part in negotiations for the transfer of Fort Sheridan to Highland Park and Highwood.

During his European stint, **Rooney**, a captain, will help the Army identify its needs for the next 18 months, if troops continue to be deployed in Bosnia that long. "It's kind of ironic," said **Rooney**, as he recalled that he argued for the deployment with his then-boss, former Sen. Paul Simon. "It came home to roost for me."

Rooney has already seen plenty of action. He volunteered for duty in the Persian Gulf, where he narrowly missed being hit by a Scud missile. He was walking toward a building that blew up right in front of him. "I saw a lot of people die in front of me," he said. "Everything gets easier after that." **Rooney** now serves in a data processing unit that, among other duties, enables e-mail to be sent across the countries where the operation is being conducted. It has also kept track of inventory being shipped into the theater.

He originally joined the Army as an enlisted man in 1983. He eventually attended Officer Candidate School. The U.S. force, originally as high as 18,000, has dwindled to 12,000, **Rooney** said, mostly in Hungary and Bosnia. "The troops over there know they're doing something worthwhile," **Rooney** said, adding that if the Americans don't do the job, the Europeans won't either.

Internet – Newspaper Archives Searches**J. Mark Rooney***(Articles are in reverse chronological order)*

Highland Park News (IL)

March 14, 1996

Highwood Gets Administrator

Author: Barbara Bell

Highwood is a changing town. For the first time in the city's 109-year history, Highwood has a professional city administrator. He is 36-year-old **Mark Rooney**, who was a liaison for Sen. Paul Simon on the Joint Fort Sheridan Planning Committee and helped write federal legislation to transfer the property to Highwood and Highland Park as well as transferring the golf course to the Lake County Forest Preserve.

Rooney, who is a captain in the Army Reserves at Fort Sheridan, has completed the course work for his master's degree in public administration at Northern Illinois University and is working on his thesis. **Rooney** will be paid a salary of \$35,000. "This is the last community on the North Shore to my knowledge not to have a professional form of government," **Rooney** said.

Mayor John Sirotti said he and the City Council had been considering hiring an administrator for two years. "We have to look at the city as a business," Sirotti said. "A city administrator is almost a must in this world." Sirotti is particularly pleased to have hired **Rooney**, who has been on the job about three weeks. "We were real fortunate to get him, I felt," the mayor said. "He's sincere about his interest and wanting to help us improve and move forward. The best thing everyone liked about him is he's excited about the future."

Indeed **Rooney** is. He said he feels "blessed" to be Highwood's city administrator. He's particularly excited about the development of Fort Sheridan by Stein & Co. because the fort will be the last piece of lakefront property to be developed on the North Shore. As Highwood's city administrator, **Rooney** will oversee the day-to-day operations of the city. In June, Highwood will receive its first payment of property taxes for city operations. Voters approved a referendum proposal last fall to raise taxes to pay for more city services.

Eventually, **Rooney** will develop a budget for all of Highwood's operations. Currently, the city operates under an appropriations ordinance in which a sum of money is approved for expenditure but not broken down by line item. Under a budget, each department is given a certain amount of money, and big expenditures such as a new fire truck are planned by placing money in cash reserves. "It tells the citizens where their money is being spent. It's the highest form of accountability," **Rooney** said of a formal budget. He hopes the city will be able to adopt a budget in 1997. "That's a goal," he said.

Another one of **Rooney's** responsibilities will be coordinating community policing at North Shore Estates, an apartment complex primarily inhabited by Hispanics. The police department plans to have an officer based there seven days a week to help residents and deter crime. In addition, other services such as health care would be provided to residents. A goal of community policing is to integrate Hispanics into the Highwood community. "They need someone to

Internet – Newspaper Archives Searches

J. Mark Rooney

(Articles are in reverse chronological order)

coordinate a lot of that actual work with outreach agencies," **Rooney** said. "You have to manage change in a positive fashion."

Rooney and his wife, who live in Northbrook, were the last couple to have their wedding reception at Fort Sheridan. In fact, the officers club had officially closed but it was reopened for **Rooney**, a veteran of Desert Storm. "I have an emotional attachment to Fort Sheridan," **Rooney** said. He's also affectionate toward Highwood. "For me, it's going to be a great opportunity," **Rooney** said.

Research Compiled by: Shannon Farr & Amanda Dillabough
 Colin Baenziger & Associates



Section 9

J. Tyson Ross

*Fernandina Beach
City Manager Candidate Report*

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Cover Letter and Resume

James Tyson Ross
1834 Old Dogwood Trail
Loudon, TN 37774
865.936.7059 (Mobile)- jtysonross@gmail.com

July 18, 2023

Colin Baenziger
VIA EMAIL: Recruit8@cb-asso.com

RE: City Manager position, Fernandina Beach, Florida

Dear Sir :

I am writing to express my interest in the City Manager position in Fernandina Beach, Florida. I have been working in municipal government for nearly 15 years, and I have a strong track record of success in leading and managing complex organizations.

I am particularly interested in the City Manager position in Fernandina Beach because of the city's strong commitment to economic development and sustainability. I believe that my skills and experience would be a valuable asset to the city, and I am confident that I can help Fernandina Beach achieve its goals.

I am aware of the challenges that the community has identified, including:

- Development: The city is facing pressure from developers who want to build more and more on the island. This is a challenge because the city wants to protect its natural resources and character.
- Resource allocation: The city needs to find a way to allocate its resources more effectively. This includes investing in infrastructure, such as the City Hall and the downtown flood protection system.
- Staffing: The city is facing challenges in hiring and retaining staff, especially given the cost of housing.
- The City-owned Golf Course and Marina: These two facilities are currently operating in the red. The city needs to find ways to make them self-sustaining.
- Parking: There is not enough convenient parking for residents and tourists.

I believe that I have the skills and experience to address these challenges. I am a strong leader and manager, and I am committed to working with the community to find solutions. I am also a skilled negotiator, and I am confident that I can work with developers to find ways to build on the island while protecting its natural resources.

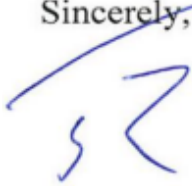
On a personal note, my wife, Jennifer, and I have been married for 22 years. We have two awesome teenage boys. Our eldest, James, is a Cadet at the United States Military Academy at West Point. Our youngest, George, is a rising sophomore who loves golf,

Section 9

track and field, and spending time with his friends. We are so proud of them. In my spare time, I enjoy reading, daily exercise, and golf.

Thank you for your consideration, and I hope to hear from you soon.

Sincerely,

A handwritten signature in blue ink, consisting of a stylized 'J' and 'R'.

J. Tyson Ross

JAMES TYSON ROSS

1834 Old Dogwood Trail, Loudon, TN 37774

Mobile: (865) 936-7059

E-Mail: jtysonross@gmail.com

SUMMARY

Experienced City Manager, Attorney, and Management Executive with expertise in the following areas:

- Leadership
- Labor Relations
- Customer Relations
- Media Relations
- Strategic Planning
- Budgeting and Finance
- Organizational Management
- Complex Transactions

An innovative leader with demonstrated organizational, analytical and communications skills. Experienced in designing change and working through others for lasting effects. Achievement-oriented with foresight and judgment; a dedicated team player who is able to work independently within the organizational framework.

RELEVANT EXPERIENCE

City Manager, Loudon, Tennessee/General Manager, Loudon Utilities 2017-Present

Loudon is a full-service municipality that includes 4 enterprise fund utilities. As City Manager and General Manager of Loudon Utilities, I am responsible for overseeing a wide range of city departments, including public safety, sanitation, utilities, public works, finance, and human resources.

Duties and Responsibilities as City Manager:

- CEO of a municipal government with 150 employees and a \$90 million budget Oversight responsibility for the following functions: public safety, sanitation, roads, electricity, gas, water, facilities & maintenance, planning and zoning, finance and personnel
- Implementation of City Council and Utility Board directed policies. Administration of day-to-day operations as well as identification and resolution of long-range issues.
- Preparation and administration of annual operating and capital budgets Negotiation with public and private sector entities on a variety of issues ranging from economic development and growth to service contracts
- Media representation of the City including appearances on television and radio, interviews with the print media and preparation of press releases
- Responsible for the City's compliance with State and Federal regulations from food safety to FERC

Achievements:

- Reimagined a City Hall construction plan and saved taxpayers \$1.5 million by repurposing existing buildings. Utilized savings to acquire downtown waterfront property for redevelopment

- Built from scratch a high-performance management team by restructuring and developing existing City and Utility staff into a joint administrative support services operation which folds together accounting, human resources, customer service, safety and IT
- Created a customer service-oriented culture through the formation of a Customer Service Department.
- Integrated and installed an advanced metering infrastructure (AMI) for the utility system which provides instantaneous feedback on customer usage and eliminated the need for meter reader crew
- Renegotiated legacy contract for wholesale water to neighboring utility district increasing customer contribution to cost of service by 93%
- Utilized my legal and real estate expertise to develop and implement a planning and zoning service department

City Administrator, City of Dalton, GA**2009-2016**

Dalton is a city with a population of 33,000 covering approximately 19 square miles. Known as the Carpet Capital of the World, Dalton is home to the majority of the world's carpet manufacturers. Dalton Utilities provides telecommunications, electricity, gas, water and sewer services to 50,000 homes and businesses and operates the nation's largest advanced wastewater land application system covering 9,600 acres.

Duties and Responsibilities as City Administrator:

- Chief administrative officer of a municipal government with 150 employees and a \$30 million budget. Oversight responsibility for the following functions: public safety, public works, parks and recreation, finance and human resources
- Implementation of Council directed policy. Administration of day-to-day operations as well as identification and resolution of long-range issues
- Preparation and administration of the City's operating and capital budgets. Media representation of the City including appearances on television and radio, interviews with the print media and preparation of press releases
- Responsible for the City's compliance with County, State and Federal regulations such as health, environmental and EEOC

Achievements:

- Taught the organization to operate like a business during the great recession. Performed a reduction-in-force by outsourcing most maintenance operations which resulted in a 15% reduction in taxes
- Merged administrative operations of the city school system and city hall which enabled the City's Chamber of Commerce to move into the building formerly occupied by school administrators which saved local businesses \$1 million in property acquisition costs
- Developed and communicated local and regional strategic plans:
 - Local Strategic Plan <https://youtu.be/WSd-mRlUbEo>
 - Regional Strategic Plan <https://youtu.be/FXHgTvMSdxU>
- Built the state's first hiking and mountain bike park in an urban setting (Mount Rachel).
- Facilitated the creation of a college athletic department at Dalton State College through interlocal agreement permitting college competitions on city fields and courts
- Managed property acquisition and construction of new expanded airport runway

- Applied achieved CALEA accreditation for police department
- Repurposed a municipal reservoir and created the region's first passive recreational destination, Haig Mill Lake Park, which now includes fishing piers, boat docks, a 5K trail, and playground
- Merged city and county planning and zoning operations under a unified zoning ordinance

OTHER PROFESSIONAL EXPERIENCE***Attorney, Minor, Bell & Neal, P.C., Dalton, GA, 2002-2009***

Managed real property law section where I represented Local Governments in matters concerning Real Estate which included property acquisition and negotiation, project finance and litigation with real estate such as condemnation and planning and zoning.

EDUCATION**Kennesaw State University, Cole's College of Business, 2008 MBA**

Emphasis on business operations, systems and organizational development

Georgia State University College of Law, 2002 Juris Doctorate

Emphasis on mediation and conflict resolution. Elected class officer, received mock trial award. Named Best Class Litigator

University of Georgia, 1997 Bachelor of Arts

Majored in History; Lettered in Football

PROFESSIONAL AFFILIATION

- International City/County Management Association Credentialed Manager
- Tennessee Municipal League
- Tennessee Valley Public Power Association
- Tennessee Municipal Electric Power Association
- Tennessee Association of Utility Districts
- State Bar of Georgia (member in good standing)

Candidate Introduction

James Tyson “Ty” Ross

EDUCATION

Degrees:

- Master of Business Administration, Kennesaw State University (GA)
- Juris Doctorate, Georgia State University
- Bachelor of Art, University of Georgia

Certifications:

- ICMA credentialed manager
- State Bar of Georgia: License No: 615170

EXPERIENCE

City Manager, Loudon, TN	2017 – present
City Administrator, Dalton, GA	2009 – 2016
Attorney, Dalton, GA	2002 – 2009

BACKGROUND

Loudon is a full-service municipality with a population of 7,000 covering approximately 13 square miles. The city serves a broader population of 15,000 with electricity, gas, water and sewer. Known as “the Lakeway to the Smokies,” Loudon is located conveniently between I-75 and Watts Bar Lake within the Knoxville metropolitan area of East Tennessee (population 870,000). Loudon boasts a diverse economy built upon the advantages afforded by the TVA (Tennessee Valley Authority) reservoir system, the intellectual horsepower of nearby Oak Ridge National Laboratory, and the workforce of the greater Knoxville metropolitan area anchored by the University of Tennessee. Recent major businesses recruited/expanded include Malibu Boats, Protomet, Hannon Systems, DuPont/Tate & Lyle, Kimberly Clark, and Amazon. With dozens of miles of riverfront, four seasons of weather, and comparatively low taxes, Loudon is a popular retirement destination. Loudon also boasts the home golf course of The University of Tennessee, at the beautiful Tennessee National Golf Course.

Loudon’s operating budget totaled \$90M in 2023. Current major projects include the expansion of a water treatment plant from 14M gallons per day to 26M gallons per day as well as the construction of a new \$10.5M community center. The City has 150 employees with nine departmental directors reporting directly to the City Manager.

The three most significant issues currently facing us are:

- Balancing union legacy expectations with low tax expectations of general citizenry.

James Tyson “Ty” Ross

Over the past decade, rising expenditures associated with union negotiated benefit plans have outpaced the general revenue growth of the City’s tax base.

- Catching up on neglected infrastructure. During the great recession, the City’s paving program was paused and was slow to restart because of tax appeals by several of Loudon’s largest industrial taxpayers. The challenge now is to coordinate repaving with water main replacement phases.
- The transition from traditional brick and mortar retail hubs to more experiential establishments that offer Amazon proof products such as communal gatherings around fun, food & beverage.

GENERAL, MANAGEMENT STYLE AND EXPERIENCE

The City of Fernandina Beach, like most cities in the U.S., is at a crossroads. Previous generations have built a community on infrastructure that is now aged. The enthusiasm of one generation is the burden of the next. I get that. As a generation X-er, it is my job to bridge the gap between preserving the historical integrity of the past and the requirements of the future. The City of Fernandina Beach faces challenges, familiar to me, that I have the experience to manage. With nearly 15 years of boots on the ground, I see myself spending the next 20-plus years of my career bringing these and other challenges to fruition.

My management style is humanistic in nature and focuses on people’s needs. Over time, I have developed three main tenets that work quite well:

1. DO NO HARM (protect others)
2. DON’T DO HARD STUFF ALONE (look out for each other)
3. MAKE OTHERS PROUD (serve)

My staff would say that I am not a micro-manager, but that I delegate and give credit where credit is due. They would say that they appreciate my open-door policy, collaborative leadership style, transparency, consistency, support, and high standards. They would add that I engage them in the design of solutions before implementation is ever considered and that they and their opinions are valued.

The elected officials I have served would say that I actively engage in the major issues of the day and that I am highly competent, innovative, fair, dedicated, and strategically decisive and rule by my integrity. Both groups would see me as a helpful visionary that puts ideas into motion. A few examples are the revisioning of Dalton as walkable with connected passive recreational amenities consisting of a mountain, a river, and a lake as well as the revisioning of Loudon’s riverfront from manufacturing to mixed use residential and commercial. Other recent projects include a new \$10.5M community center, a \$78M water treatment plant expansion combined with a new \$6.5M 24-inch water main crossing the expanse of the Tennessee River to deliver water to half the City’s customers for generations.

James Tyson “Ty” Ross

My two biggest strengths are my strong sense of humility and my strong sense of optimism. In our profession of civil service, one must check his/her ego at the door. Sure, the City Manager must have a strong will and sense of determination to get things done but he/she must get things done through others. In my profession, people who want to do things their way 100% of the time do not last long. My sense of humility informs my belief and trust in others to shoulder the actions items necessary for organizational success. In short, their wins are my wins, and more importantly, the community's wins.

In terms of weaknesses, I recognize that my eternal optimism can also be a weakness. Time has taught me to cool my enthusiasm and to keep a more mindful emotional distance rather than fall in love with a project. This temperament has enabled me to perform better cost/benefit analysis and understand that even if a project has tremendous merit the timing of the project may need to be in better keeping with social dynamics and general pace of the community's politics. Time has taught me to trust my elected officials and their keen understanding of what is right for the community, right now. The best tool I have found in determining what is safe to pour my enthusiasm into is the formulation of a Strategic Plan with the help of my elected officials and duly engaged stakeholders. Going through the process of stacking hands on what we as a community want to get done in the coming years is invaluable. I did this most recently in Loudon where we spent the year designing goals and objectives for our community's advancement. This included the redevelopment of our waterfront and the enhancement of our interstate corridor. My governing body uses this plan as a metric to evaluate me; I in turn, use its action items to evaluate my staff.

I am proud of my leading role in securing over a dozen acres of formerly dilapidated factories on Loudon's downtown waterfront. The solution I designed and implemented with staff satisfactorily cleared all environmental hurdles and enabled the demolition and clearing of the property which opened clear lake views. What is more, I was able to rebrand a factory's former water tower into a dramatic welcome sign that announces to all visitors they have arrived at a special place (think of it as our lighthouse). The project remains exceedingly successful and though somewhat stalled by COVID-19 is well positioned for both residential and mixed-use commercial in the coming months.

In terms of misgivings, I regret being able to achieve only two-thirds of the identified goals of Dalton's green hat program. While we were able to repurpose a private reservoir as recreational amenity and we were able to construct the state's first mountain bike park, we were unable to assemble enough parcels of land to secure the construction of a downtown square. At the end of the day, assembling the downtown parcels was cost prohibitive during the recessionary climate of the day. My lesson learned was one of timing. While the project did have tremendous merit and was an excellent long-term strategic move, it just was not the right time to properly execute that facet of the plan.

The challenges I see facing Fernandina Beach are: (1) striking the proper balance between longtime residents and newcomers; (2) organizing and projecting resources towards current

James Tyson “Ty” Ross

needs; (3) assessment of facility needs for planned/phased improvements; (4) intergovernmental relations (trust building with win-wins); (5) consensus on the right police chief; and (6) last but not least creating more parking options. Nothing here rattles me in the least bit. I have seen it all before.

During the first six months, my efforts will involve:

- Listening to internal and external stakeholders to assess operations, concerns, positions, and dynamics.
- Internalizing existing strategic goals and objectives and update as necessary.
- Assessing infrastructure needs, and the anticipated financing need to cover it.
- Building consensus around a new police chief.
- Prioritizing and planning phases of infrastructure needs.

I work well and extensively with the media and try to ensure accurate, quality coverage for citizens. Part of my effort is designed to help the media keep up to date on the operations and programs. My personal appearances in the media can range from occasional to frequent, as I defer to the Mayor and elected officials, as they prefer.

I do not anticipate anyone contacting the City with negative comments about me.

In my spare time, I enjoy reading, daily exercise, and golfing with my family. I am a proud father to two awesome boys, James and George. My wife, Jen, and I have been married for 22 years. Our latest hobbies include following George, our high school sophomore, around on the golf course at matches and reading letters about the daily heroics of our eldest son James who is a New Cadet at the USMA at West Point currently in basic training (BEAST!).

SIX ADJECTIVES OR PHRASES I WOULD USE TO DESCRIBE MYSELF

- Director of the movie not the star
- Ambitious for others and humble for self
- A curious educator who explains things in a simple manner
- Very consistent
- The most reasonable person in the room
- A person of integrity

REASON FOR DEPARTING CURRENT POSITION

When I read the solicitation for the City Manager of the City of Fernandina Beach, I immediately saw myself in the role. I have attended many business conferences at Amelia Island. I could

James Tyson “Ty” Ross

easily see myself there engaging in the work I have spent my entire adult life fine-tuning. The timing is perfect. Finally, yet importantly, my person, Jen, loves the place.

CURRENT / MOST RECENT SALARY

My annual compensation here in Loudon is \$175,000. Additionally, I have use of a take-home corporate vehicle and my family receives health insurance at no cost.

CB&A Background Checks

**Background Check Summary for
JAMES TYSON "TY" ROSS**

Criminal Records Checks:

Nationwide Criminal Records Search	No Records Found
County	
Loudon County, TN	No Records Found
Whitfield County, GA	No Records Found
State	
Tennessee	No Records Found
Georgia	No Records Found

Civil Records Checks:

County	
Loudon County, TN	No Records Found
Federal	
Tennessee	Results Pending
Georgia	No Records Found

Motor Vehicle

Tennessee	No Records Found
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Credit

Excellent

Personal Bankruptcy

No Records Found

Sex Offender Registry

Not Listed

Education

Confirmed

Employment

Confirmed

Social Media

Nothing of Concern Found

**Background Check Summary for
JAMES TYSON “TY” ROSS**

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

**Background Check Summary for
JAMES TYSON "TY" ROSS
Personal Disclosure**

Personal Disclosure Questionnaire

Name of Applicant: Ty Ross

The following questions are designed so that we will be able to make full disclosure to our client concerning your background. Please answer them honestly. Cutting corners or misrepresenting your past will result in you being eliminated from all further searches conducted by this firm. We understand that frivolous charges are sometimes made and that charges do not mean you were guilty. We also understand that you may have been wronged and needed to seek compensation. The bottom line is that we want to be certain that our client is fully informed. If you have any questions, please contact us for clarification.

Please explain any yes answers on a separate sheet of paper.

1. Have you ever been charged or convicted of a felony?
Yes ☐ No ☒
2. Have you ever been accused of or have been involved in a domestic violence or abuse incident?
Yes ☐ No ☒
3. Have you ever declared bankruptcy or been an owner in a business that did so?
Yes ☐ No ☒
4. Have you ever been the subject of a civil rights violation complaint that was investigated or resulted in a lawsuit?
Yes ☐ No ☒
5. Have you ever been the subject of a sexual harassment complaint that was investigated or resulted in a lawsuit?
Yes ☐ No ☒
6. Have you ever been charged with driving while intoxicated?
Yes ☐ No ☒
7. Have you ever sued a current or former employer?
Yes ☐ No ☒
8. Please list links to all your social media accounts (Facebook / Instagram / LinkedIn / Twitter, etc.) and your personal web page if you have one.
linkedin.com/in/ty-ross-529715284
9. Is there anything else in your background that, if made public, would cause you, our client or our firm embarrassment if it came to light through the press or any other mechanism?
Yes ☐ No ☒
10. Please provide a list of any lawsuits in which you are or have been a party either as plaintiff or defendant.

Attested to: _____

[Signature]
Signature of Applicant

Please email this form via PDF DOCUMENT to Monique@cb-asso.com or via fax to (561) 621-5965 **no later than 5:00 PM MST 07/28/2023.**

CB&A Reference Notes

Reference Notes

Tyson Ross

Jack Qualls – Economic Development Agency Director, City of Loudon, TN 865-963-5729

Mr. Qualls has known Mr. Ross since approximately 2017. Mr. Ross is both the City Manager and Utility Manager for Loudon. Mr. Qualls and Mr. Ross have worked together in multiple capacities on economic development for the zoning and utilities side of the City. Though Mr. Qualls does not work directly for Mr. Ross, all their interactions have been positive.

Mr. Ross is a team player and leader who is easy to work with. He cooperates with Mr. Qualls, as evidenced by recruiting key members from his own staff to Mr. Qualls' area. Mr. Ross enables people to work together and push projects to completion. He capably orchestrates politics within the City. For those in a similar position to Mr. Ross, blending in is a challenge because newcomers are often outsiders in the organization. However, Mr. Ross has quickly overcome this challenge and has turned this weakness into a strength.

When working with Mr. Ross, Mr. Qualls feels like an equal and greatly enjoys working together. Mr. Ross keeps Mr. Qualls informed via emails, calls, and weekly meetings scheduled with staff. While staying on top of City and utility issues, Mr. Ross contributes much expertise. For example, he can refer to his legal background at times. Additionally, he has good experience dealing with the public in both groups and one-on-one. He presents well, often using many visual aids. Sometimes after opening the floor for dialog and questions, he encounters questions he is unable to answer. During these instances, he goes back to find and provide the information the person requested.

Mr. Ross is rarely in his office. He is available when necessary, but he is continuously out in the community. He involves himself in the community and is a member of Rotary. Even when he first came to the City, he jumped on one of the trash trucks and came to every building, talking with the utility workers. He had the rare managerial characteristic of rolling up his sleeves and engaging with the workers.

When making decisions, Mr. Ross looks at all available facts as he weighs pros and cons. He looks at the bigger picture to see what is best for the community at large. After considering input from public and political sides, he combines their input to make well-articulated decisions. He has worked similarly when hiring, though Mr. Qualls is generally unfamiliar with Mr. Ross's hires. Recently, Mr. Ross hired the City's Public Works Director. Mr. Ross looked into various position facets and expectations while asking someone from Human Resources to comment on applicants. Mr. Ross refrained from bringing politics into the decision; rather, he found someone with the expertise he wanted.

Moreover, Mr. Ross has good financial skills and takes the budget into consideration. On occasion, he has brought in outside support to deliver unbiased opinions. He is highly practical in the sense that he looks to where the City needs to be in the future, rather than simply saving money. In addition, Mr. Ross looks at what an organization can become by flexibly making departments more efficient while staying within budgetary constraints. When he came to Loudon, he took the City's historical information to perform departmental reviews of job duties

Reference Notes

Tyson Ross

on what staff did and where staff might be more productive. Afterward, he moved people around, thus making the City more effective and providing citizens with better customer service.

Mr. Ross has many other qualities. He is calendar-focused and sticks to a set agenda. He is a facilitator who brings his team together to come up with a game plan and to ensure everyone is on the same page. When facing stressful situations, he similarly pulls his team together to fix a problem. He has good knowledge of and experience with intergovernmental relations. He works well with city, county, and state governments.

Furthermore, Mr. Ross is a problem solver who looks at all available information, makes an action plan, and implements that plan. For example, he dealt with several changes the public may not have been aware of. These alterations started prior to his arrival, and he had to handle these changes once he became Manager. In another instance, Mr. Qualls and Mr. Ross worked on a project involving the demolition of a downtown factory. This project required much articulation as they gathered support from the public and the City. A couple people opposed the project, but this opposition to demolition may have been because the blighted area may have created certain buffers these people wanted to keep. However, Mr. Ross made the project a reality. The area currently sits as a pleasant green area for future development.

As a city administrator, Mr. Ross fights for his team and constituents. He is fair and honest. He communicates well. Everyone Mr. Qualls knows has been highly appreciative to have Mr. Ross in the capacity they have known him. Mr. Qualls is unaware of anything in Mr. Ross's background or conduct that will concern a future employer. Mr. Ross is a family-oriented, upscale citizen. Mr. Qualls wishes Mr. Ross the best and would hire Mr. Ross in a heartbeat if given the chance. Mr. Ross is a great manager who works well with his employees.

Words or phrases used to describe Tyson Ross:

- Team leader,
- Team player,
- Upscale citizen,
- Family oriented,
- Quite easy to work with,
- Tenacious, and
- A communicator.

Strengths: Ability to articulate and get a message across that is welcoming; ability to get people to work together and push a project to completion; capably orchestrating city politics; working with others.

Weaknesses: Blending in is often a challenge to people in Mr. Ross's position. However, he has overcome that challenge after being with the City for about a year.

Reference Notes

Tyson Ross

John Canada – Former Human Resources Director, City of Loudon, TN 423-337-8373

After Mr. Canada's retirement from corporate human resource employment, he began working part-time as a consultant and advisor. When Loudon's Manager and Utilities Director passed away, Mr. Canada helped recruit Mr. Ross to the position in 2017. During the recruitment process, Mr. Canada talked with a municipality Mr. Ross had previously interviewed for. Mr. Ross had come in second for that position simply because the municipality had hired an internal candidate who had been there for several years.

Mr. Ross is a good leader and gentleman. He is a friendly, personable, and highly intelligent individual whom employees have received well. Having much valuable experience, he holds a particularly diverse position as a city and utilities manager. Usually during recruitment, most people are either administrators or utility directors. Few have qualifications for both positions.

Though Mr. Ross has little obligation to report to Mr. Canada, Mr. Ross is a good communicator who has kept Mr. Canada informed at regular city, board, and Council public meetings. Mr. Ross also keeps others thoroughly informed. He is well adapted. He relates exceptionally well to both subordinates and his superiors. For instance, he once unhesitatingly joined a sanitation crew to spend a day on the garbage truck. The next day, he was found wearing a suit and tie as he related with television and city personnel.

Mr. Ross has been an excellent decision maker in general. He has found a balance between financially sound and politically unsound choices. He is constantly in situations where he has to either make the morally correct decision or make decisions others want. However, he defaults to the morally acceptable decision and provides good reasoning. Mr. Ross has done likewise when hiring personnel. For example, he has chosen to hire an individual with the necessary skillset over a councilman's nephew.

As a problem solver, Mr. Ross knows how to properly utilize his assets to make financially sound decisions. He has enacted several great changes. For example, he has made major personnel adjustments in the Human Resources Department to streamline the once dysfunctional financial organization. Now, the Department functions well. With other departments, he excellently reorganized both management and hourly workforces into more efficient operations. In another example, Mr. Ross has improved the City's power score assessment. The Tennessee Valley Authority (TVA) is a huge organization that provides municipal power by selling that power to the City. TVA then controls financial rates of what a municipality can charge for power using on audits. Based on a municipality's assessment, TVA uses different score sheets to measure rates. Under Mr. Ross, the City has gone from a particularly low assessment chart to being much higher and thus under TVA's guidelines.

Mr. Ross is an innovative individual. From an organizational standpoint, he has done well streamlining and bringing teams together. He also manages the diversity of the organization. For instance, he balances the needs of the electric department with garbage pickup. Though the needs

Reference Notes

Tyson Ross

within the organization are vastly different, Mr. Ross has done a better job putting these needs together and finding solutions than what had previously been done 40 years ago.

Mr. Ross is a servant-leader. He brings his subordinates up and allows them to grow for the benefit of the whole organization. He has given them voice and input in situations they previously have been unable to speak. As such, his employees have grown tremendously.

If Mr. Canada had to go back, he would rehire Mr. Ross in a second due to Mr. Ross's leadership. Mr. Ross is someone Mr. Canada would love to have in his organization. Mr. Ross's subordinates would also say what a huge difference Mr. Ross has made. Mr. Canada has been amazed with how well Mr. Ross balances politics and work-related stress. Though Mr. Ross's job is continuously controversial, Mr. Canada is unaware of anything of significance that might concern a future employer. Mr. Ross will excel as a municipal manager.

Words or phrases used to describe Tyson Ross:

- Gentleman,
- Good leader,
- Well received by the people who work for him,
- Intelligent,
- Friendly,
- Personable, and
- Great experience.

Strengths: Perceptive, sharp mind, quick problem solver, innovative, holds diverse positions, adept at the necessary politics of his position and being able to relate to multiple bosses.

Weaknesses: He is someone who lets individuals charter their own course and is not quick to set the course for them. He may need to take different courses more quickly, but this characteristic is more of a leadership style than a weakness.

Kristin Reinke – Small business owner, Loudon, TN 734-693-2107

Ms. Reinke first met Mr. Ross at a social event approximately in 2018 as a small business owner in his jurisdiction. Around 2019, Ms. Reinke noticed several political issues in Loudon. As such, she decided to go to Mr. Ross with these issues, and began to attend City Council meetings. She has known Mr. Ross as both a concerned resident and a family acquaintance.

Mr. Ross greatly enjoys getting to know others. In the City, newcomers often encounter walls from local citizens. Initially, the local population coolly welcomed Mr. Ross when he arrived.

Reference Notes

Tyson Ross

However, on his own, Mr. Ross walked to have lunch at a local diner. This moment helped him enter a community that otherwise skeptically considered outsiders.

Mr. Ross is an anomaly to the City due to his superior intelligence in comparison to the local population, though in a humble and patient manner. He observes much as he discerns people and situations quite well. Despite being overly qualified for his position, Mr. Ross is quite likeable. He has experience in real estate law, teaching, and coaching. All three areas of expertise are critical to his City Manager position and handling the public in general. For example, he has dealt with fielding calls about sinkholes and property issues. He has also handled complex legal and financial matters. Using his experience and intellect, he affects change for his community. He capably meets people where they stand.

In general, Mr. Ross is a thoughtful decision maker. He is a deep and complex thinker who uses his background to resolve conflicts. If working on a complex zoning issue, he steps back to acknowledge the issue. He breaks down what is going on and how to address the issue while showing he is doing what is best for the people. By breaking down high-level issues for the community, he garners community support.

Furthermore, Mr. Ross is fair. This characteristic has created some conflict, mainly due to him choosing to hire people outside of government officials' relatives. The City provides significant healthcare benefits for its officials, such as completely paying premiums for an employee and the employee's family. Consequently, many officials wish to extend positions to family members. Instead, Mr. Ross hires based on merit and qualification. He seeks the best people for the position, rather than who is next in line. He is unafraid to bring about change as he does what is best for his constituents and taxpayers.

As a family man, Mr. Ross and his wife have raised two boys who have done well in the school system. His children are polite and respectful. Though Mr. Ross often faces hostility, he has a greater support group. His ability to remain with the City shows his humility, dedication, and family values. He also responds to stress unbelievably well by compartmentalizing. Though his wife knows Mr. Ross's struggles, his children are unaware of scrutiny. Mr. Ross impressively compartmentalizes his high-stress dealings in one area to attentively focus on his family.

At times, Mr. Ross has been almost too politically correct. During a particular local catastrophe, Ms. Reinke wished Mr. Ross had called out councilmembers for their false allegations against him, which might have stopped the issue from going as far as it did. However, Mr. Ross wisely was patient and diplomatic. After all, he knew Council might terminate his job in just two weeks. Mr. Ross understood he needed to build relationships in order to accomplish goals. Furthermore, anyone who knew the situation understood the flashy media headlines were fabricated and that the Council had been procedurally illegal. A short investigation of the issue showed nothing wrong. In fact, Mr. Ross was given more responsibilities and pay raises after the event.

Mr. Ross retains his composure under pressure, though he has been strongly worded at times when reaching a breaking point if his job has been on the line. Additionally, he is on utility

Reference Notes

Tyson Ross

boards and leads planning and zoning. Though his duties are generally more than a person can handle, he effectively performs his responsibilities due to his qualifications and background. He is engaging, calm, and composed despite his large burden. Rather than wasting mental energy on serious issues outside his control, he maintains a healthy perspective on what he can control. He is an eternal optimist who is willingly part of the solution without being emotional.

Ms. Reinke is unaware of any controversy regarding Mr. Ross. The City's council often makes issues personal, mainly because they have been unwilling to accept some of Mr. Ross's vision on making the City more efficient. Some council members try to twist matters for grounds of his removal. However, Mr. Ross perseveres with high ethics. Despite his difficulties, the City continues to employ him, and many citizens stand behind him.

Though Ms. Reinke feels bittersweet about the thought of Mr. Ross leaving the community, she gives him her highest recommendation. He is highly educated, has high morals, and lives a healthy lifestyle. Even though he may need to act more boldly on his interests, he is motivated and excited. He loves being in the room helping make decisions to move a community forward. He will be a great manager for any organization or community.

Words or phrases used to describe Tyson Ross:

- Humble,
- Intelligent,
- Family man,
- Dedicated,
- Fair,
- Thoughtful, and
- Eternal optimist.

Strengths: Experience, intellect, interpersonal skills.

Weaknesses: He is almost too politically correct in some situations. From a citizen's standpoint, Ms. Reinke has been frustrated Mr. Ross is not bolder, though his stance may be due to lack of City infrastructure and his limitations working in a small area.

Joe Ford – Former City Attorney, City of Loudon, TN 865-748-1116 865-458-4301

Mr. Ford has worked with Mr. Ross since 2017. Mr. Ford is the Attorney on behalf of Loudon, and Mr. Ross is its Manager. Mr. Ross has been a trusted friend and work associate.

Mr. Ross initially arrived in a nightmarish scenario because the previous City Manager died in office. Some of the people who had not been hired for the position tried making Mr. Ross unsuccessful. Additionally, he worked in a building that should have been torn down or removed

Reference Notes

Tyson Ross

decades earlier. Throughout all these challenges, Mr. Ross developed several fierce and loyal friends, including Mr. Ford.

Mr. Ross has been outstanding. Despite having to handle entrenched attitudes, he has performed excellently. He has great planning and vision into the future. He is highly involved in the community and is simply active in general. He attends practically all gatherings and meets with the individuals who need his interaction. He is more optimistic than people know how to take him, but he truly is that way.

Mr. Ford and Mr. Ross have great interactions with one another. Although Mr. Ford generally remains informed because of necessity, Mr. Ross communicates with Mr. Ford over phone, email communication, and website updates.

Mr. Ross also has good experience working with the public. Whenever a new City Commission is to be elected, many try to use city managers as a pawn in the upcoming election. However, Mr. Ross deals well with the public, including those who have a bad attitude toward him.

When making decisions, Mr. Ross has been collaborative and quick. For instance, the City had an old water tower that had become an eyesore due to its owner's poor maintenance of the structure. The City had tried to handle the situation for several years, but no one was able to buy the property holding the tower. After Mr. Ross arrived, he quickly had the project done within his first six months after receiving donated resources and getting volunteers. Rather than simply painting the tower and scraping off rust, he knew someone who might wrap the structure. Now, the water tower stands as a City symbol, thus changing the downtown area look. In another example, City Hall had been sitting in a dilapidated building for approximately 20 years. In a year-and-a-half, City Hall moved to a brighter new building.

Mr. Ross also made good decisions with staff. He has excellent interactions with personnel and refrains from approaching people from a position of authority. Staff can easily communicate with him. He is also customer service oriented. Throughout stressful situations, Mr. Ross has been eternally optimistic. In some instances, Mr. Ford thinks Mr. Ross needs to defend himself when someone has worked behind Mr. Ross to cause damage. However, Mr. Ross consistently turns out to be correct.

As an innovator, Mr. Ross has worked on multiple projects to improve the City. He has used his excellent financial skills to find money when people think none exists, such as with the water tower. Another project he tackled involves an old textile mill right on the river. The old factory sat and rotted on 13 acres of the most premium type of property in the City. The building owners did not want to sell at a decent price, but Mr. Ross was able to get a good purchase price. The situation became more complex afterward as the City conducted many environmental studies, removed asbestos, and added grass. Mr. Ross ran a particularly complicated deal for the City's benefit, but a small group of people opposed demolishing the building due to a small cat colony living on the property. The issue was controversial, but the cat colony was fine in the end.

Reference Notes Tyson Ross

Moreover, Mr. Ross has good intergovernmental knowledge and experience. He has worked closely with the Loudon County Mayor, the County Sheriff's Department, and the Office of Economic Development. He participates in several organizations, such as with the Loudon Rotary club as its two-year running president, a statewide utility group, and the organization from which the City buys its gas.

Mr. Ford is unaware of anything in Mr. Ross's professional or personal conduct that might concern a future employer. If given the opportunity, Mr. Ford would hire Mr. Ross, especially considering Mr. Ross's legal background. Though some people may have negative opinions regarding Mr. Ross, these individuals generally complain about anything. Mr. Ross has made and will continue to make a good manager.

Words or phrases used to describe Tyson Ross:

- Optimistic,
- Direct,
- Kind,
- Excellent,
- Collaborative, and
- Innovative.

Strengths: Planning and vision into the future, community involvement, active attendant, optimism, financial skills, personnel interactions.

Weaknesses: He may possibly be more optimistic than people know how to take him.

Rodney Grugin – President, Loudon County Chamber of Commerce, TN 865-458-2067

Mr. Grugin has known Mr. Ross since Mr. Ross's arrival as the Loudon City Manager in 2017. As President of the Loudon City Chamber of Commerce, Mr. Grugin works closely with city and county leaders in business and economic areas. Mr. Grugin has limited interaction with Mr. Ross, though Mr. Ross has provided a quite favorable impression overall.

Mr. Ross presents himself quite admirably. He is professional and can prioritize. He visualizes where the City needs to go. He effectively understands how to accomplish projects and has excellent financial skills.

Mr. Ross is a good public personality who is well liked by employees. He has valuable experience dealing with community members. When with the public, he is patient and well spoken. He has effectively gone out into the community and represented the organization. He is customer service oriented.

Reference Notes

Tyson Ross

The City has made good progress during Mr. Ross's leadership. With the Mayor and department heads, Mr. Ross had good interactions. When working with elected officials, Mr. Ross has done well with his circumstances, which have been typical for any governmental bodies. Mr. Grugin has never seen Mr. Ross flustered or upset under stress.

Mr. Ross is an innovative change agent who has maintained the organization at a high performance level. The organization has definitely improved since his arrival. When he first came, he quickly developed a vision of there he thought the City might go and found ways to push that vision forward. After implementing these changes early, he maintained standards.

Additionally, Mr. Ross creatively solves problems and does well with his circumstances. When some have said, "This is the way we have done this," Mr. Ross has pushed past these responses. He does not take "no" for an answer on several issues, which Mr. Grugin has appreciated. For example, Mr. Ross dealt with a piece of riverside property on which an old factory sat. The City had tried dealing with the valuable property for several years, without making progress. Mr. Ross enabled the City to purchase, clear, and clean up the property to get it ready for redevelopment.

Mr. Ross has done well in Loudon and has been exactly what the City has needed. The City has been ready to move forward, and he has helped in that movement. If Mr. Ross chooses to leave, Mr. Grugin is certain the City will be worse off in some ways.

Mr. Grugin is unaware of anything in Mr. Ross's background or conduct that will concern a future employer. Any small controversies he has been involved in normally occur in any small municipality. Mr. Grugin would hire Mr. Ross if looking for a manager. Mr. Ross has the skillsets to be a good municipal manager.

Words or phrases used to describe Tyson Ross:

- Professional,
- Compassionate,
- Driven,
- Organized,
- Goal-oriented, and
- Overall gives a favorable impression.

Strengths: Presents himself well, planning, employee interactions, project completion.

Weaknesses: Something Mr. Ross might need to work on is looking at the other side of an issue slightly better at times, although this trait is not truly a weakness.

Reference Notes Tyson Ross

Jim Greenway – Former Mayor, City of Loudon, TN 865-776-4413

Mr. Greenway was the Loudon Mayor when Mr. Ross first joined as the City Manager in 2017. In 2018, Mr. Greenway retired from politics. Though Mr. Ross had the ability to operate on a larger scale than Loudon, he had some local ties, which helped bring him to the City.

Most everyone was happy with Mr. Ross, and the City was lucky to have him. He dealt exceptionally well with employees and went out to meet them regularly. He was viewed as an outsider at first, but the City had specifically looked to hire someone outside the area. The community warmed up to him. With the area becoming more of a retirement community and with people developing tunnel vision, Mr. Ross effectively handled this situation because of his diverse background.

Mr. Ross and Mr. Greenway shared excellent interactions. They often had conversations that were professional yet personal. Mr. Greenway knew Mr. Ross told the truth. Similar to Mr. Greenway, most people felt comfortable conversing with Mr. Ross.

Mr. Ross planned effectively and was ready. He handled the budget more capably than the City Council had anticipated. Additionally, he was great in the public and addressed the public on issues the City had. He had good knowledge of and experience with intergovernmental relations. He even educated the community about intergovernmental interactions. He effectively solved problems and communicated with others. If he had a particular issue he was unsure of, or if he faced an internal issue, he directed himself to talk with others to find a solution.

As an excellent decision maker, Mr. Ross was inclusive. A few councilmembers might have shared negative comments about staying updated on every issue, but not everyone needed to know everything.

One project the City tried to accomplish for decades concerned an old industrial property along the river. The City wanted to beautify and let the area grow. When Mr. Ross arrived, this project was one of his first items of business. He gave the City the support it needed, and the whole community was happy. The result became one of the greatest accomplishments he had provided to Loudon. Recently, many major commercial companies have looked at the property, and these events have been a direct result of Mr. Ross coming in to push the City forward.

Another issue the City dealt with involved developing a new employee manual, which had not happened for a long time. A fairly strong union had existed within the utilities sector, and Mr. Ross arrived in the process of the union breaking apart. He picked up these issues well and pleased the community. In fact, employees who had argued about the employee manual were able to work with his solution. Mr. Ross was a good leader.

Being customer service oriented, Mr. Ross dealt with the City as well as utilities. A majority of his problems came through utilities, and he bravely handled these issues. Even with encountering problems concerning generational families, people went away either partially or fully satisfied.

Reference Notes

Tyson Ross

He refused to hide from the public. He was quite collected and thought before speaking. If meetings became contentious, he remained calm without giving ground.

One controversy Mr. Ross had been involved with occurred when he first came to the City as the City bought and sold some property. Mr. Ross jumped in to quickly accomplish certain tasks that needed completion, such as political personnel issues. Some people had held positions in their family, which had caused lowered productivity. Mr. Ross changed who received these positions, which upset a few community members. However, people soon recognized his changes worked and were good for the City.

Mr. Greenway is unaware of anything in Mr. Ross's background that might embarrass or concern a future employer. Mr. Greenway is one of Mr. Ross's greatest supporters and would hire Mr. Ross if possible. In fact, Mr. Greenway is unhappy to think about Mr. Ross leaving the City. Mr. Ross is approachable and comfortable to be around. He speaks facts and holds pleasant conversations. He is a leader who will perform well for anyone. He is a great manager.

Words or phrases used to describe Tyson Ross:

- Forward thinking,
- Capable,
- Approachable,
- Intelligent, and
- Good father.

Strengths: Planning, preparedness, public interaction, self-directing.

Weaknesses: Some local citizens thought Mr. Ross's vocabulary was better theirs, but the generational community warmed up to him. Also, some community members who were critical of Mr. Ross were not involved in city government and were generally critical of anyone.

Alicia Vaughn – County Manager, Catoosa County, GA 706-537-1848

Ms. Vaughn worked with Mr. Ross approximately between 2009 and 2019. She met him when he began working as the Dalton City Manager. At the time, she was the Assistant Finance Director for the City. She again worked with him when she became the Chief Financial Officer (CFO) for Whitfield County.

Mr. Ross was a forward thinking individual who was quite innovative. He had some particularly exciting projects he pushed through, such as a park he helped develop in Dalton, though he left before the project was finished. He did well in fast-paced environments that welcomed growth

Reference Notes

Tyson Ross

and progressive thinking. He was an exceptionally supportive and great mentor. When Ms. Vaughn looked into the CFO position, he encouraged her to apply.

Mr. Ross fostered a team environment by recognizing people's strengths and weaknesses and put together a team that worked well together. He was a leader who rallied people and got others excited about a project. He innovatively thought of ways to help people see his vision. The park he developed had started in a place with practically nothing there. Mr. Ross also had the vision on changing a Dalton water reservoir into a park.

When Ms. Vaughn worked with Mr. Ross in Dalton, she was on a separate management level. However, he continuously kept department heads abreast through monthly department meetings. While working on projects, he had a working group and kept them informed. Later when Ms. Vaughn worked for Whitfield County, he communicated effectively when they worked together on a Special Purpose Local Option Sales Tax (SPLOST) list, which involved a penny sales tax used to finance capital projects.

Mr. Ross had good experience dealing with the public, such as when working on the SPLOST list. Such a list was a significant initiative for any government in Georgia because it was one of the main resources for financing projects. However, these lists were on a three or four year cycle, with new cycles taking an additional year to be put up. Because of these cycles, citizens needed to remain informed to initiate the list. He held citizen workshops and kept people engaged. He spoke effectively in a way citizens understood because he remembered whom his audience was.

In general, Mr. Ross wanted to gather information to make knowledgeable choices and was unafraid to make decisions. Although Ms. Vaughn had little direct experience with any hiring Mr. Ross performed, she understood his ability to read people well might help him with any hiring decisions he made. He was customer service oriented and timely.

Mr. Ross had a good understanding of financial policies and how government finances differed from private industry. Most of the projects Ms. Vaughn and Mr. Ross worked on involved some aspect of finances. With SPLOST, for example, he needed to understand how the program worked, how to read receipts, and how to create a project list based on newly acquired revenue. Mr. Ross was financially minded, as proven by many of his larger projects and grants he worked on at Dalton. In 2012, Mr. Ross also worked with the City on a Local Option Sales Tax (LOST), a single penny sales tax that the City and County had to split. Such splitting was convoluted due to service delivery involvement. Mr. Ross was instrumental in the negotiations as he helped the City and County come to an agreement on how to split proceedings. Such an event happened once every 10 years and required a person with the ability to solve problems.

Outside of LOST and the subsequent service negotiations that were sometimes contentious, Ms. Vaughn is unaware of any controversial matter Mr. Ross may have been involved with. Ms. Vaughn is also unaware of anything in Mr. Ross's background that might concern or embarrass a future employer. She is unsure why he left Dalton, although she suspects he left to find a forward-thinking organization that was growing and more of a challenge.

Reference Notes

Tyson Ross

If given the opportunity, Ms. Vaughn would absolutely hire Mr. Ross. He handles stress quite admirably and is professional. He will be a great fit for a community looking for innovation and change. He has been and will continue to be a good manager.

Words or phrases used to describe Tyson Ross:

- Forward thinking,
- Quite innovative,
- Exceptionally supportive,
- Great mentor,
- Innovative,
- Professional, and
- Levelheaded.

Strengths: Oral and written communication skills, strong vocabulary, professionalism, levelheadedness, fostering a team environment, innovation, mentoring abilities, citizen engagement.

Weaknesses: If the workload is overly repetitive or boring, he will not do well because he performs better in a fast-paced environment. He may also want more control and sometimes have a hard time delegating tasks, mainly because he likes to see projects through from start to finish.

TJ Kaikobad – Owner of Cyra’s Restaurant, Dalton, GA 706-370-7305

Mr. Kaikobad first met Mr. Ross in approximately 2007. As a business owner in Dalton, Mr. Kaikobad shared multiple lines of connections to Mr. Ross. Mr. Kaikobad sat as a board member of the Dalton Downtown Development Authority (DDDA) when Mr. Ross was in City Hall. They worked on many projects together. They spoke on economic development of the downtown Dalton area, participated in civic groups, and were a part of the Visitor’s Bureau.

Mr. Ross successfully forged consensus. When spearheading a project, he capably helped people to see his vision. He prepared and put together various facets of a project, such as receiving support from everyone involved with the project. Once he presented the project, the presentation was more of a formality than a herculean task because people already had voiced their support. Mr. Ross also implemented his ideas, rather than simply dream of various notions. He had ambition to translate his desires into behavior. Had Mr. Ross stayed with Dalton, the City might have been five years ahead of its current progress.

Mr. Ross had much experience working with the public. One of his strengths was working both with groups and one-on-one. He made balanced, mature, and well thought out decisions. He was solid as he included all angles. Rather than being impulsive or reactive, Mr. Ross was stable.

Reference Notes

Tyson Ross

Without a doubt, Mr. Ross was customer service oriented between businesses, citizens, and various municipalities he dealt with. On occasions, the County and City had separate agendas. In these moments, Mr. Ross bridged differences without demanding complete surrender or surrendering himself.

Mr. Kaikobad had little intimate experience regarding Mr. Ross's financial skills. However, Mr. Ross worked productively on budgets. He was meticulous, thorough, and well planned.

Additionally, Mr. Ross exhibited several other characteristics. He was mostly innovative and maintained the organization at a high-performance level, though he was certainly a change agent. From Mr. Kaikobad's vantage point, Mr. Ross was an effective problem solver. Mr. Ross studied people and problems instead of quickly prescribing a solution. By placing good emphasis on understanding the problem, he capably approached solutions with a higher degree of success. For example, the City and the DDDA had budgetary differences. Rather than letting one party have full monetary discretion of funds, Mr. Ross studied the proposed budget resolutions carefully. He came back supporting some ideas and recommending revisions to others, thus effectively removing the conflict in this area. In another instance, he mediated a contentious sales tax revenue claim between the City and County. Each group had been ready to sue the other, but Mr. Ross was a good facilitator as both sides talked.

Despite the stress of his position, Mr. Ross remained even. With his style and background, he digested information to keep himself from making reactive decisions. Though he experienced differences, he was never an antagonist or the root cause of tension. He remained in the middle and was balanced.

Mr. Ross eventually left Dalton after a new mayor stepped into office. Unfortunately, this mayor acted rashly and was voted out in the next election. Because of his integrity, he wanted to find another place where he might believe in the leadership and what that leadership dictated.

Mr. Kaikobad is unaware of anything in Mr. Ross's background or conduct that might concern a future employer. Mr. Ross has good ethics and morals. He is a family guy whom others greatly respect. If Mr. Kaikobad were a general in an army, he would want Mr. Ross to lead one of his battalions because Mr. Ross leads with vigor and honest decision-making. Mr. Kaikobad would hire Mr. Ross in a heartbeat. Without a doubt, Mr. Ross will make a good manager.

Words or phrases used to describe Tyson Ross:

- Diligent,
- Dedicated,
- Thoughtful,
- Loyal,
- A commander, and
- Ambitious.

Reference Notes
Tyson Ross

Strengths: Forging consensus, preparation, idea implementation.

Weaknesses: He is a little too gentle at times due to his diplomacy, though this characteristic can be seen as both a weakness and a strength. However, Mr. Ross has a high expectation of integrity in others and has not obvious weaknesses.

Prepared by: Danielle Dayton
Colin Baenziger & Associates

CB&A Internet Research

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

https://www.citizentribune.com/news/state/loudon-city-council-preps-for-meeting/article_46ec5020-49af-5e2e-aed9-bce79a2367ce.html

Citizen Tribune

July 19, 2023

Loudon City Council preps for meeting

Author: Nate Tosado

Loudon City Council recently met in a workshop to prepare for Monday’s upcoming regular meeting. Council considered six items for approval, including the adoption of a new sewer ordinance, discussion of a recent economic development plan, bids for a new community center and the planning of the council retreat. Jack Qualls, Loudon County Economic Development Agency executive director, presented what he said was a data-driven economic plan made possible by a \$50,000 grant. The report covered the county as well as Loudon, Lenoir City and Tellico Village and included a market analysis, strategic assessments and vision and goals for the future. The data also showcased what the community wants most in the coming years.

“Everybody wants a Target in our community — that was always the big one,” Qualls said.

“They want more grocery stores, which was one popular thing that came from that. Better shopping and dining and more affordable housing.”

Members of council all received the report. “The consultants compiled all those surveys, went back, looked at the data and where we’re at and what’s going on with our community,” Qualls said. “Most of the growth of the population has happened in the last decade in the Village. That’s where most of the people and most of the houses have been built in the last decade.” Quall hopes the study will be a “living document” that will continue to be updated. The full study is available online at <https://www.loudoncountyeda.org>. Council also set in motion a new sewer ordinance for Loudon featuring new wastewater regulations. A short discussion followed the official reading of the ordinance. Council is expected to vote on the measure in the coming weeks.

In conjunction with the changes, council discussed an underwriting proposal for a new series of water and sewer revenue bonds. The four firms requesting proposals were ranked in the following order: Wiley Brothers, Piper Sandler, Raymond James and Baird. “The main reason that Wiley Brothers ranked first is because of the volume of work they do in the water-sewer bond business in Tennessee,” **Ty Ross**, city manager, said. “They have done 27 bonds in the past four years. They also have familiarity with our system. They issued a bond back in 2012; we’re not new to them. They understand the dynamics of our system, both industrial and residential. We thought that it would be a good fit for Wiley Brothers.” Mayor Jeff Harris assured council members the item was for consideration only and no vote was needed.

Council will consider at Monday’s meeting a request for the abandonment of an unused section of road behind Cogdill Motors and El Senor and will vote on inviting sealed bids for construction of a new community center. An annual planning retreat is set for Aug. 3-4.

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

<https://www.tml1.org/town-and-city/loudon-officials-aim-get-city-%E2%80%98looking-good%E2%80%99-new-beautification-campaign>

Tennessee Municipal League

Date Unknown – Post Covid

Loudon officials aim to get city ‘Looking Good’ with new beautification campaign

Author: Kate Coil

Loudon officials are bringing their community together to keep things in the city looking good. Loudon Mayor Jeff Harris said city officials and residents began to notice there was a great accumulation trash and litter during the early days of the pandemic. “It came up through discussions we were having with downtown merchants, citizens, and residents,” Harris said. “I don’t know if it’s tied to COVID, but more and more people seem to be going to drive-thrus, and we are seeing more fast food bags and things littering highways. I know because of COVID there were a lot of places that were only doing drive-thrus. We wanted to clean that up, but also expanded the scope to add new signage, plants, planters, and take it to another level. We also want to encourage businesses to spruce up their storefronts and perhaps come up with an award for their efforts.”

Ty Ross, city and utility manager for the city of Loudon, said the Looking Good Loudon project came together after city officials prioritized their goals for the city at a series of meetings and retreats concerning Loudon’s future direction. The Looking Good Loudon campaign is divided into three sections: clean up, spiff up, and build up. “Cleaning up is an anti-litter campaign first and foremost. We thought that was long-hanging fruit. It is also something people can get involved in at the individual level, whether through behavior modification or through clean-up projects. The spiff up part is more about permanent aesthetics, whether it be gateway signage, landscaping, or something as simple as straightening a stop sign that is leaning. Build up is more long-term, and it’s bigger. It is thinking about from a Google Earth perspective where are the problem properties, where are the empty dilapidated buildings that need to be replaced. That is something the city would prosecute with the council’s support through code enforcement and city court to get buildings that are dangerous from a public safety standpoint addressed.”

The “build up” section of the campaign has developed into its own program called “Five to Fix.” **Ross** said the program is focused on repairing or removing dilapidated and dangerous properties within the city limits. “You can always find five properties in your community that you can focus on,” he said. “We have an auxiliary list of maybe 20. This list can get too long and you can get bogged down in the weeds. We thought if we focus on five, we can have a narrower focus and work on that. When one gets taken care of, we can pull from the backup list and a new property gets taken care of. It may not solve all the problems, but it will move the needle.”

Harris said the ultimate goal of Looking Good Loudon is not to be punitive but rather give people incentive to do the right thing. “We want to put a positive spin on it,” Harris said. “We don’t want to come in with a heavy hand and tell people if they don’t do this then we’ll do that.”

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

We want everyone to buy into the whole idea of Looking Good Loudon. We are going to print some t-shirts and put banners on our light poles with this theme. Hopefully, this will create a lot of momentum.

One of the ways the city is getting involved is by scheduling a city-wide clean-up event and providing resources for residents who want to work on beautification projects on their own. “We have designated May 1 as Looking Good Loudon Day,” **Ross** said. “We don’t see this as a temporary thing; it’s an ongoing initiative. We are pacing ourselves. We wanted to have an annual recognition day and are looking at May 1, which happened to be a Saturday this year which was perfect. It will be a day of volunteerism where we will pull people together, divide them up into groups of family and friends, and set them out to go tackle some problem areas. That’s where our residents can get involved. We are facilitating that with an online sign-up form for volunteers and a checkout packet complete with pickers and safety vests that can be checked out. Maybe May 1 isn’t your day or you’re busy, but you want to do something on your own. The city is the facilitator for that.” The city is also working on replacing signage for historic area and replacing old signs around the city that are fading. City leaders hope that this signage will also help market homes and businesses in the historic district more marketable.

A little effort can go a long way. **Ross** said many do not realize that there can be financial benefits from community clean-ups. “You hear and read about inequality, and you know it is real,” he said. “You can go from one neighborhood to the next and see differences, but one thing we can all have in common can be values and behaviors. It doesn’t matter if you live in a shack or a mansion; through your behavior you can keep it neat and presentable. It snowballs. People don’t realize that when you plant flowers around your mailboxes you can add 10% to the appraisal value of your home. Little things like that can make big differences and pay dividends down the road.”

Ross said that word of mouth about the campaign has been enough to get many residents started on their own efforts. “A city is just an idea, nothing more and nothing less. It’s a layer of services on top of a county,” he said. “If you like that idea and you are in favor of that idea, you promote that idea by lifting that city up and helping it look good. Believe it or not, it’s already happening naturally. I can drive to work on a Monday morning and I will see bags of trash where people have gone on their own and picked up just because people read an article in the newspaper, came to a city meeting, or talked to a council member or city employee about what we’re doing. It’s becoming a part of the conversation.”

Harris says that part of the challenge Looking Good Loudon faces is changing local attitudes toward littering to prevent the same people who always pick up from constantly cleaning up after those who don’t. “It’s a mindset people have,” he said. “I think we have to change that mindset. We want people to think ‘I can’t just throw things out the window.’ The way I was raised, you just didn’t do that, and I think we’ve lost some of that. We all have to take personal responsibility. We have to change people’s mindsets. We also have to educate people on the importance of recycling.

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

Harris, who is president-elect of the local Rotary Club, said one of the ways the city is looking to re-educate the population is by having Rotarians take recycling and anti-litter campaigns into elementary and middle school classrooms.

Overall, Harris said he hopes Looking Good Loudon brings the city closer together. “I hope it has a long-term effect as far as making everybody really proud of their city,” he said. “If we can make people take personal responsibility to make their community look good, we’ve accomplished something. That isn’t going to happen overnight, but if we can create a positive vibe and get everyone working together to do it, I think that will have a lasting effect. It just builds community involvement, togetherness, and unity. It will also make our city more beautiful long-term.”

Ross said the campaign is also a way for Loudon residents to leave a positive imprint on their city. “I think everybody who works in municipal government wants to leave a footprint,” **Ross** said. “It’s that Athenian oath we hear about so much to ‘leave it better than you found it.’ This has been a tough year; it’s one of the toughest years in American history. We have intense partisanship going on at the national level. This is an effort to focus on ourselves. It’s acting locally, but thinking nationally. If we can do our part and build community pride, camaraderie, and volunteerism through Looking Good Loudon we can build our community.”

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

Daily Times, The (Maryville, TN)

July 2, 2022

Loudon County bans Bitcoin mining

Author/Byline: Hugh G. Willett

Loudon County Commission approved Monday a six-month moratorium on Bitcoin mining operations in the county. Bitcoins are a type of cryptocurrency created by powerful computers through the generation of coded algorithms to ensure security. Large fans needed to cool the computers generate too much noise, District 5 Commissioner Van Shaver said at a June 20 workshop. Shaver said he has been looking into complaints from residents in his district regarding a Bitcoin operation on Hickory Creek Road near the Watt Road exit of Interstate 75/40. "It sounds like a jet airplane engine running," he said.

Shaver said similar operations by the same company in Washington County met with public opposition and had to close after a lawsuit was filed. He said he is worried the planned addition of more modules combined with hot weather will make the problem even worse. "The harder the fans run, the louder it gets," he said. Shaver also said when the company applied for a permit to build the operation they described it as a data center. He said he wants commission to discuss a halt to new Bitcoin operations in the county until the situation can be resolved.

Blake Shelton, site manager for Ava Data, was at Monday's meeting and offered to provide more information about the company. "We want to be friendly neighbors," he said. Shelton told commissioners at the workshop his company and the property owners submitted a special exception application, which was approved, in September to the Loudon County Board of Zoning Appeals. He said the company appeared before the Loudon County Planning Commission in November and was unanimously approved. "We also supplied a representative photo of modular pods such as what would be deployed on site as part of the review process," Shelton said. He said the facility is a blockchain data center that solves mathematical problems to find the next correct set of numbers in a code. The more computers working, and the more powerful the computers, the faster calculations can be run and the greater amount of bitcoins Ava Data can obtain. The facility currently employs five and will eventually employ 12. The operation, which is still under construction, needs large amounts of affordable electricity. The facility buys electricity from Lenoir City Utilities Board, he said. Shelton said the company pays an electric bill of about \$750,000 per month. When completed, the facility will require about 40 megawatts of electricity per month, he said. "Thanks to LCUB, electricity prices in the region are very affordable," he said.

When choosing a site, the company looked for a heavily commercialized area. The location is near the interstate and a truck stop and away from residential neighborhoods. He said the company worked with a consultant to perform a sound study and outfitted the modular pods that house the computers with sound-dampening louvers. Shelton said noise from the fans at about 70 decibels could be mitigated by monitors and the installation of sound barriers. He said the

Internet – Newspaper Archives Searches

James Tyson Ross

(Articles are in reverse chronological order)

company has checked with commercial and industrial neighbors and is not getting complaints.

"Some of the people we talked to didn't even know we were already operating," he said.

Ty Ross, general manager of Loudon Utilities Board, said at a June 20 workshop the utility has been approached by similar companies but decided not to take them on as customers because the amount of electricity used could tax capacity.

Ross said the most suitable places for such businesses, which are not good job creators, are in Rust Belt and rural areas with underutilized electric grids. He said sound barriers such as those along interstates have been used to reduce noise.

Shelton said parent company Red Dog Technologies, LLC is based in Washington County. The company was able to reduce noise at that site but faced zoning issues. The operation has since been moved to an industrialized area. "We learned a lot from this experience and are applying those lessons from the Red Dog situation to all our future operations, including the Ava Data site," he said.

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

Roane County News, The (Kingston, TN)
September 23, 2020

First TVA-owned battery storage to shape energy future

Author: Unknown

The Tennessee Valley Authority announced Monday that it is installing TVA's first owned and operated, grid-scale, battery energy storage system near an industrial complex in Vonore, Tennessee, about 35 miles southwest of Knoxville. "TVA is building the energy grid of the future," said Senior Manager Dale Harris, who leads research and development for TVA. "This pilot project will help us to innovate and adopt new technologies that will provide businesses clean, low-cost, reliable electricity while helping them meet their sustainability goals." Known as the Vonore Battery Energy Storage System, the project will use lithium-ion batteries, the same technology used in most electric vehicles, to store 40 megawatt-hours of energy. That is enough electricity to power over 10,600 homes for three hours.

When the facility is operational in 2022, the battery energy system will provide high-quality power to local industrial customers served by Loudoun Utilities Board. The Vonore BESS will improve the quality of electrical service provided to local manufacturing facilities without building additional transmission lines. According to Loudon City Manager and Loudon Utilities Board General Manager **Ty Ross**, the battery energy system will allow energy to be stored when demand and prices are low for use when demand is higher, reducing costs for Loudon Utilities and local industries. "TVA's battery will provide premium power for the industrial complex customers we serve," said **Ross**.

The Vonore BESS will also serve as a test bed as TVA prepares to meet future energy needs. "We are at the forefront of using large-scale battery storage," said Harris. "Battery storage has many energy applications, and the Vonore BESS will help TVA make broader use of this important technology as we continuously work to provide safe, clean and reliable power to the 10 million people who live and work in the region we serve." The Vonore BESS will be TVA's first battery storage system to go online, but not the only grid-scale battery storage system that TVA will use. In February, TVA announced a solar project in Lowndes County, Mississippi, for its Green Invest programs that will include 200 megawatt-hours of battery energy storage.

Both battery storage projects are part of the 2019 TVA Integrated Resource Plan, a comprehensive study that shapes how TVA will provide low-cost, reliable and clean energy for the next 20 years. The IRP calls for adding up to 5 gigawatts of energy storage capacity through 2038. "TVA engineers, scientists and technicians are continually working with our industry partners to shape the future of the energy marketplace and power the long-term economic health of our seven-state region," said Dr. Joe Hoagland, vice president, TVA Innovation and Research. "We are developing and investing in the latest and best technologies to ensure the steady flow of reliable and clean energy as we build out the nation's premier energy system."

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

The Tennessee Valley Authority is a corporate agency of the United States that provides electricity for business customers and local power companies serving nearly 10 million people in parts of seven southeastern states. TVA receives no taxpayer funding, deriving virtually all of its revenues from sales of electricity. In addition to operating and investing its revenues in its electric system, TVA provides flood control, navigation and land management for the Tennessee River system, and assists local power companies, and state and local governments, with economic development and job creation.

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

The News-Herald (TN)

July 29, 2020

Loudon Creates City Planning Team

Author: Parker Wright

Loudon City Council passed Monday on the first reading a new approach for city planning services after letting the contract with Loudon County expire. Council since 2009 has paid \$25,000 to Loudon County in an interlocal agreement, which provided the city with planning services. Loudon County Commission this year chose to raise the rate to \$85,000. "This would be an administrative team again with myself, Travis Gray, Brooke Millsaps and Nicole Curtis," **Ty Ross**, Loudon city manager, said. "We plan to design and implement a very user-friendly website, which will direct applicants and developers to the proper forms, the proper check lists, the proper processes to get their questions answered and their developments reviewed, whether that be by staff or by planning commission. We definitely, and this comes from many comments from this body, want to have a customer service focus." **Ross** noted the "unique" opportunity of having a utility manager and planner in one position and how that affects his ability to make decisions about developments sooner rather than later. **Ross** is proposing each administrative team member receive a 5 percent raise, which will cost the city \$17,000 annually. Councilman Tim Brewster asked for clarification from city attorney Kris Frye whether the change to **Ross'** duties would require a charter change. Frye assured him the changes could be made in an ordinance. Brewster then wanted to know if Loudon Utilities Board could help with the costs of the planning team. "If we go that route, couldn't the utilities absorb some of that then? Because it's going to involve them a lot more with you working in it I hope," he said. **Ross** said it had not been discussed with the board yet, but he would.

Brewster also requested Frye talk to the county about giving the city a break since it is being charged for the first quarter's planning services while being cut off in August. "Kris, since the county dumped this on us, what about us approving saying, 'Hey, forgive the first quarter you're going to charge us for.' They're going to charge us from July to October," Brewster said. "What I'm trying to say, since they did it without notice and give us time to get everything together, I say we go back to the county and say, 'Hey, the first quarter, you should offer that up for free'." Frye agreed to write a letter to county attorney Bob Bowman. "We certainly don't need to pay for a full quarter if we're only getting one month of services," Frye said. Loudon Mayor Jeff Harris suggested a prorated payment. Councilman Johnny James and Councilwoman Tammi Bivens motioned and seconded to approve the ordinance at first reading. The motion passed unanimously. A public hearing will occur at 6:25 p.m. Aug. 24 at city hall before council meets for a second and final reading. **Ross** apologized to the public and Brewster for a comment he made at the June 8 council meeting about the councilman wanting to run the town out of his "back pocket." "I just wanted to acknowledge that at times during the past month my interactions with council member Brewster became somewhat confrontational, but it's up to me to always show respect and not cross the line," **Ross** said. "I think when I made the comment, the back pocket comment that was quoted in your newspaper story maybe six weeks ago, that I crossed that line, and I should not have made that comment, and I want to apologize for it."

The News-Herald (TN)

July 22, 2020

Loudon Cancels Meeting When Council Balks

Author: Parker Wright

A special called Loudon City Council meeting set for July 7 and involving the possible splitting of duties for Loudon City Manager and Loudon Utilities Board Manager **Ty Ross** was canceled before being held. Loudon Mayor Jeff Harris said the Loudon Municipal Building can accommodate only 50 people with social distancing measures in place. Harris and other city employees received calls from residents that they were planning to attend and speak. "We just knew we were going to be over that number, and how are we going to accommodate everyone that wanted to speak and wanted to attend and hear the results, the outcome of that meeting?" Harris said. He made arrangements to move the meeting to the Loudon High School auditorium, but that was not well-received by some council members. "I just took it that this was a special called meeting for one thing, which required special arrangements, because it was evident that the public was going to show up," Harris said. "We had been informed of that by several, several people who requested to address council on this matter. There's just really no way that space would have accommodated us. ... I think the public felt strongly about this and they wanted their voice heard. We were trying to accommodate them with that request."

Councilman Tim Brewster said a week was not enough public notice for a venue change. He also didn't think it would be a good idea to encourage "hundreds of people" to gather at a meeting when COVID-19 numbers are on the rise. Councilman Johnny James said he denied the request because a large crowd would foster a tense atmosphere. "Well, we didn't want to put on a spectacle or a show," James said. "It wasn't for the public. It was basically for the mayor and the city council and the city manager. I just felt like it would turn into a shouting contest and you couldn't see who was doing the shouting and you couldn't keep quiet and there's no call for that, no place for that. We've had it, and we don't think we'll ever have it again. I think we've reached an agreement, and I think it's a milestone, and I think we're moving forward. We didn't need the meeting. We proved that."

The meeting was initially called at the request of Brewster to discuss splitting the two positions held by **Ross** after a proposal to add city planner to those titles. Brewster said he "doesn't feel comfortable" with one person filling all three roles. Brewster suggested the positions be split into city manager/city planner and a separate LUB manager position. He proposed opening the city manager position internally to interested city employees for 30 days. If no one applies, the position would then be opened to outside individuals. "(The city manager/utility manager) salary right now is \$137,000 a year," Brewster said. "The utility board pays \$100,000 of that. The city only pays \$37,000. We are paying the county \$25,000 to do our planning service until July 1. They're wanting to increase that to \$85,000. So we wouldn't have to procure any extra money. We could take the \$25,000 we're already paying the county and add it to the \$37,000 we pay now for the city manager. "... Before we voted on the budget, I asked for **Ty Ross** to sit down with me with department heads, so we could go through the budget line by line, because myself,

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

when I was going through the budget, I found \$40,000 that was being procured every year and not being spent," he added. "That's money we could move over to help pay for a planner. There's over \$100,000 now without having to add any extra money that we have to spend on a city manager/planner."

The county originally requested a \$60,000 increase by July 1, but the two governments have reached no agreement. Brewster said the change isn't directed at **Ross**, who could apply for the city manager/planner position. "When Ms. Smith left (the county), they took a look at where her time was spent," Councilwoman Tammi Bivens said. "The majority of her full-time position was spent on city of Loudon planning issues. That was a full-time position for her, not her entire full-time position, but what the county deemed 85% of it was. So I didn't feel comfortable giving that to not even a full-time city manager to do."

Some residents still attended a regular council workshop July 7 that was initially planned to follow the called meeting. Loudon resident Kristin Reinke said she had questions for council about the canceled meeting and the nature of the cancellation. She questioned if the agenda was finalized. Harris said Brewster, Bivens and James requested the meeting. Kris Frye, Loudon city attorney, said only one council member had to withdraw support of the called meeting for it to be canceled. Brewster withdrew his support. "I don't see how anyone who's never held those positions could possibly say it's more than Mr. **Ross** could handle,"

Loudon resident Roger Nash said. "That's just my personal opinion. I'm just going to say it again, and I hope it hits home. We're tired of the animosity of this board, this council, showing toward city manager **Ross**. It's unproductive, totally unproductive. I'll have more to say at the next meeting if this is an agenda item."

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

The News-Herald (TN)

June 10, 2020

Loudon Renews Manager Skirmish

Author: Parker Wright

Loudon City Council again Monday considered splitting the roles of Loudon Utilities Board manager and city manager **Ty Ross**. Councilman Tim Brewster requested the item be put on the agenda for discussion at the city's workshop, **Ross** said. Council is expecting Loudon County Commission to request \$60,000 more in the upcoming budget for a planning services agreement with the city. Loudon now pays the county \$25,000. Brewster said instead of paying \$85,000 for planning services, council should split the roles of city manager and utility manager and make the city manager the city planner as well. He said there is "no way" one person can perform the roles of city manager, utility manager and city planner effectively.

Council last discussed the possibility in February. "I did inquire with (Municipal Technical Advisory Service) as to what qualifications would be required for me to perform these services, and I was told that there were none other than eight hours of training per year," **Ross** said. "I asked if there was a requirement to be certified with the American Planning Association and MTAS said, 'No.' ... I would counter Mr. Brewster's proposal that we keep the budget as is, and I simply perform the services with a management team. I'd be given the freedom to allocate the \$25,000 as I see fit in the fulfillment of those responsibilities for planning services." Loudon Mayor Jeff Harris supported **Ross'** recommendation.

Brewster remained adamant in his belief **Ross** could not handle the three positions because "it's just too many variables in there that won't work." He requested Harris put it on the agenda for June's regular meeting to vote on splitting the position. Councilwoman Tammi Bivens requested formal proposals for each option. Nicole Curtis, city recorder, agreed the decision should be thoroughly "mapped out," but warned council that separating the positions is not as simple as it seems because the "organization structure is interwoven" and the closeness between the utilities and council has "proven to be very beneficial."

Brewster questioned how splitting the position would change the structure. "Because I serve as city recorder and for the utilities," Curtis said. "Who do I report to? Director of support service serves both the city and utilities. Who does that person report to? Have you ever worked for two bosses at the same time? Who do you serve? That would be my question." Curtis said earlier in the year **Ross** made it so LUB and city council had to approve plats as well as Loudon Regional Planning Commission. She believes it would be easier if developers had one point of contact. She said there was less opportunity for miscommunication and issues to be overlooked.

Harris suggested trying the joined positions temporarily to see how it goes and evaluating effectiveness later. "We're talking about the coordination of the zoning ordinances and approval of plats," **Ross** said. "If this stayed with the county for the next 20 years, every plat would be brought to me anyway. ... I think this is wasteful. I think it's a poor use of taxpayer dollars. I

Internet – Newspaper Archives Searches

James Tyson Ross

(Articles are in reverse chronological order)

think it boils down to personalities. I don't think there's any business judgment or leadership going on here. ... I think it would be prudent to wait 60 to 90 days to make a decision like this." Harris again agreed.

"Folks, if you want this town to run through (Brewster's) back pocket, continue down the path he sets before you," **Ross** said. "I run a collaborative organization. We have department heads that work in unison. I am no dictator. To be couched that way, as me consolidating power, I take great offense to, because I take a great amount of pride in serving this organization through the ethical cannons of (International City/County Management Association)."

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

The News-Herald (TN)

June 3, 2020

Loudon Using Committee to Adjust Benefits

Author: Parker Wright

Loudon City Council established May 26 a benefits advisory committee. The committee will explore recommendations and consider options for Loudon's current employee benefits package and look for ways to assure adequate funding. The action comes after "two years of disagreement over how to move forward with our benefit plan," **Ty Ross**, Loudon city manager, said. The committee is to be comprised of city employees and residents. "No. 1, just to learn who we are and what we do from a historical perspective," **Ross** said of the committee's role. "Then also to understand the current market and how our long-term plan interacts with that current market. Last but not least, have an actuary do some projections of our current plan and what that cost would be in the future."

The committee would make recommendations to council, which would still be the approving body of any changes, Jeff Harris, Loudon mayor, said. Councilwoman Tammi Bivens and Councilman Johnny James motioned and seconded, respectively, to establish the committee, which passed unanimously. Bivens was concerned the committee might delay council's decisions and take longer to agree on a plan. "I think that's been our shortfall in previous years is it just seems like it's last minute, and then we're forced to vote on it," she said. **Ross** said the committee can accomplish what it needs to by August.

Bivens asked **Ross** to address the deadline in the resolution that establishes the committee so members can be held accountable to the deadline. "I wouldn't advise attaching a date to it yet," **Ross** said. "Because of the ebb and flow of the fiscal cycle ... August might be doable, but we might not assign that to it just yet. I am 100 percent in favor of having it align with our fiscal budget ... where we are right now in this time of year." **Ross** said the committee will look at the "cadence" of the renewal of the benefit cycle to find the best dates to provide council with recommendations.

City council also looked at appointments to the committee. **Ross'** recommendations were Tim Dixon, Gene Farmer, Bill Geames, James Webb, Clay Townson, Aubrey Cagle, John Franklin and Jim Thomason. Everyone on the list volunteered except for Thomason, **Ross** said. Thomason is a certified public accountant who impressed **Ross**. James said he did not approve of Franklin's recommendation due to personal issues. Councilman Tim Brewster requested council vote on each member individually. All recommendations except Franklin were unanimously approved. Franklin was "no" on a 4-1 vote, with Harris casting a "yes." Council will look for a new recommendation.

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

The News-Herald (TN)

June 3, 2020

LUB Approves \$10 Million Transfer

Author: Parker Wright

Loudon Utilities Board approved May 26 a \$10 million fund transfer from the natural gas department to the water department to pay for improvement projects. Board members Bart Watson and Gene Farmer motioned and seconded, respectively, with the vote passing unanimously. LUB initially reviewed the issue at the May 11 workshop. The list of projects is estimated at \$27.2 million with the expansion of the water treatment plant using up most of the fund at \$13.4 million. **Ty Ross**, LUB manager, said \$10 million will be transferred from the natural gas department to the water department by using the Loudon Industrial Development Board as a "conduit."

Kris Frye, city attorney, said the contribution amount would only be "transferred as needed." As invoices for the projects come to LUB, the separate fund will be used for payment. "At no point will the IDB have discretion on how these funds are used on anything other than improvements and expansions," Frye said. "If the \$10 million is not allocated completely then the funds will go back to the natural gas department." Farmer asked if the \$10 million would be moved up front. "No, you're authorizing expenditures of up to \$10 million to be spent on a list of projects to be publicly bid and contracted for and sent back to you," **Ross** said.

Watson was concerned that by approving the transfer of funds LUB would also be approving all of the projects listed. **Ross** assured him each project would come before the board to be bid, contracted and approved before moving on with construction. Farmer asked **Ross** why it was a mandate LUB had to use the board in the process. **Ross** said the mandate did not explicitly state to use IDB as the conduit, but the IDB was decided to be the best choice because it was "close to home," whereas the Loudon County Economic Development Agency was made up of appointees from other cities. "The statute requires the use of an economic development agency to be the conduit for this type of contribution, and it be up to the IDB as well to agree to the terms of this agreement," Frye said. "If they're not willing to serve as a partner on this, then it will come back to us, but as it stands, they are the best vehicle we have in the city of Loudon to partner with on this."

For now, smaller projects will take precedent, while the water treatment plant expansion will be held off. **Ross** is waiting to see if money from the CARES Act can be used to cut the cost of the expansion in half. The board also approved water rate increases through Jan. 1, 2023, that will help pay for improvement projects. Residents will see water bills increase as customers contribute a higher percentage of costs. Beginning Jan. 1, 2021, customers will pay 72 percent instead of 65 percent. That rate will increase to 79 percent Jan. 1, 2022, and 85 percent Jan. 1, 2023. For example, in July a residential customer in Loudon on average would pay a monthly charge of \$11. In January 2021, that same customer would pay a \$13.52 monthly charge. By January 2023, the amount would increase to \$18.56 monthly.

The News-Herald (TN)

May 13, 2020

Cities Prepare for Difficult Budget Season

Author: Parker Wright

Annual budget preparations are approaching as Lenoir City and Loudon assess the financial impact of COVID-19. Numerous businesses were forced to close or adjust in March and April. Governments must use tax revenue estimates for the two months since real data won't be available for at least another month, Maggie Hunt, Lenoir City recorder/treasurer, said. "I talked to the state comptroller because I wanted to know what are other cities doing because everybody's in the same situation that we are," she said. "He says they're passing a budget, estimating what they think the numbers will be. What we're going to do is look at our budget in six months after we pass this new budget and see if we are making more revenue than we thought we would. Are our expenditures higher? Then we'll do adjustments then because we'll know more about how the virus has affected everything across the board in six months."

Loudon is looking to the University of Tennessee Municipal Technical Advisory Service for guidance. "The budget will be impacted by COVID because ... we can only estimate and project reduction in revenues," **Ty Ross**, Loudon city manager, said. "In that regard, we're following the herd, and we're going with MTAS projections that show state share funding that's coming out from state-collected revenues like sales tax, beer taxes, gas taxes. They collect all that money and distribute it out to the cities based on population, but they're projecting a 10 percent reduction in that revenue. So that's what we're projecting for the city of Loudon revenues in general is a about a 10 percent reduction."

Fortunately, a majority of Loudon's revenue — close to 50 percent — comes from property taxes, which haven't been affected by the pandemic, Loudon Mayor Jeff Harris said. Hunt said Lenoir City is hoping big box stores like Walmart and Home Depot can pick up whatever slack is caused in other areas of the community. Hunt has been told those stores have been experiencing record sales and trusts that can balance the city's numbers. In the event it can't, Lenoir City will dip into reserves. "Luckily, we have a great fund balance," Hunt said. "We have prepared for something like this happening. We have a \$4 million fund balance. By the state's recommendation, \$2-2.5 million is what the fund balance should be. So we are really prepared for this kind of situation."

Lenoir City Mayor Tony Aikens said the city will use reserves before even considering raising taxes. "The main thing is they can expect to see no tax increase," he said. "... We believe that because of the amount of reserves we have built up for emergencies, and certainly this is an emergency, that we can dip into the reserves ... and balance the budget. We anticipate the budget being \$200,000-plus short, and it may be more than \$500,000 short. That's a lot of money for Lenoir City government. ... It's tough times, and we're certainly not going to burden the taxpayers."

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

Ross will recommend holding steady to Loudon City Council at Monday's workshop. "We are not recommending to the council any reduction in service," he said. "What we are recommending to the council is a static budget from which we want to spend on personnel, payroll and benefits and head count, what we spent last year, but no increases other than the prior promise or assurance of adequate funding for the health plan. ... Normal times, you might look to if there's enough money coming in to enhance services, whether it be with additional headcount or higher pay for existing head count in the form of raises."

The proposed budget will also limit capital expenditures to "just gotta have stuff," **Ross** said. "There are a few things that we're going to spend our focus on for some investments in the community that are needed," Harris said. "Queener Road, that construction's going to start early fall, so we have to set funds aside for our portion of that. There's a need for a new fire truck, and instead of paying for that all at once, we're going to take a financing approach and spread that out over five years so we don't liquidate our general fund so much. We're looking to do a lot of paving ... and looking at maybe going into debt service for that because it's really affordable right now. "The police department needs new computers for their vehicles ... and we've worked out a plan to do half this year and half next year," he added. "The public works department needs a new leaf machine, and that's something that's been put off and put off. We're keeping things to a minimum and keeping our budget as static as we can keep it."

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

The News-Herald (TN)

May 6, 2020

LUB Approves Contract with Industry

Author: Parker Wright

Loudon Utilities Board voted April 27 to authorize Morgan Olson as an interruptible natural gas customer. Morgan Olson has requested from LUB an "additional metered natural gas supply for future manufacturing purposes," **Ty Ross**, LUB manager, wrote in the meeting's agenda. **Ross** suggested the board approve a "new interruptible supply contract." The board has done something similar in the past with manufacturer Kimberly-Clark. "If you will recall, a few months back, a few meetings back, where you approved a special agreement, a special rate for Kimberly-Clark," **Ross** said. "That structure was created to cater to specific supply contract because Kimberly-Clark was such a large volume user. This agreement is more catered to Morgan Olson, which would be an intermediate user."

In order to supply Kimberly-Clark, LUB had to find and acquire more gas beyond their pre-existing supply. **Ross** believes LUB will be able to accommodate Morgan Olson with gas from the existing supply. "However, Morgan Olson will use more than the typical residential user," **Ross** said. "Because of these volumes, they can cause price spikes in extreme weather months like January. We look to install this interruptible rate so that our gas users are not subsidizing this supply." The recommendation sparked questions from the board. Don Campbell, LUB chairman, asked if it could be considered a protection for residential customers. **Ross** said this was exactly the purpose.

"How will we establish a rate on this? What will it refer to?" Bart Watson, LUB board member, said. "The rate they will pay is the rate that they are paying now unless there is an event of interruption that has been declared," **Ross** said. "Notice will be provided. Let's just say for example that there's a three-day weather drop below zero in the weather. Market gas prices typically spike during that time period. The spiking process would be passed along to the consumer that is signed up at an interruptible rate, which in this case would be Morgan Olson." Board members Gene Farmer and Watson motioned and seconded respectively, with the vote passing unanimously.

At the beginning of the meeting, Campbell recognized LUB employees who have been offering help to Hamilton County and Chattanooga after a storm left the area extremely damaged. After LUB sent members from Team A to help in Hamilton County for two days, they sent members from Team B to help in Chattanooga for two more days. Sending the teams follows the team rotation LUB has been following amid the COVID-19 pandemic. **Ross** said he received nothing but words of praise about the crew members from Cleveland utility officials.

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

The News-Herald (TN)

March 11, 2020

LUB to Examine Personnel Policies

Author: Parker Wright

Loudon Utilities Board could make changes to policies affecting personnel. The current policy requires LUB employees to live within the utility district limits. **Ty Ross**, LUB manager, requested at Monday's workshop that the policy be lifted because it is "archaic" and is causing issues among some employees. "We have a utility employee that has inherited property just outside the district," **Ross** said. "It's a nice, inexpensive place to live, but again they are unable to take advantage of it because of the policy. We also have a situation where an employee has a spouse who has a great job in Knoxville, and simply desires to split the commute between two work places."

Ross suggested when hiring that LUB look at a potential employee's ability instead of where they live. However, if two equally qualified employees are "standing beside each other," the local employee would be preferred, he said. "In today's world, you've got people living everywhere," Tim Dixon, LUB board member, said. "You know, they don't just live in the current location here." Bart Watson, LUB board member, worried about employees being able to report to work on time. "In addition to that (policy change request), I would ask that we remove the nepotism clause that's inside the policy because — and it's a personal belief of mine — if someone, if the best qualified candidate for a position just happens to be related to someone at the utility, well that's not really fair to our rate payers," **Ross** said.

As long as common sense is used, kin working together would not pose any conflicts of interest, he said. Watson said having family members work alongside each other might not be a good idea. He gave the example if two family members worked in the same team and one died, the team would temporarily lose two members while the one family member took leave of absence for grieving. "Side by side, we would do our best to avoid that scenario because you wouldn't want a single crew or department dependent on one family," **Ross** said.

Dixon pointed to the unlikelihood of such events taking place. Most of the board members spoke out in agreement with the requests for change. Gene Farmer, LUB board member, advised it would be best to "leave (the decision) to the discretion of each department and they can make the decision." "What if in 12 years, it's run amok, and we need to bring it back in? Will we be able to simply make a change?" Dixon said. **Ross** assured board members once passed the ordinance could be revisited and amended. "I think we're up for the change," Don Campbell, LUB board chairman, said.

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

The News-Herald (TN)

March 11, 2020

Loudon Considers Budget Amendments

Author: Parker Wright

Loudon City Council during Monday's workshop discussed budget amendments pertaining to medical plans and money for the courthouse square. **Ty Ross**, city manager, proposed a medical plan funding increase that would impact this year's fiscal budget by \$86,736. Medical insurance plan changes have been discussed at Loudon Utilities Board and city council meetings for the past two months. A budget amendment was needed to keep funds available after it was ultimately decided to leave the plan alone.

The amendments would require two readings, **Ross** said. Plans are to have council look at the funding change later this month and then again in April. A public hearing will be at 6:25 p.m. April 27 before city council meets five minutes later. "In this year's fiscal budget, \$100,000 was designated from the Courthouse Square Fund to be used for preliminary engineering and design for our Riverwalk," **Ross** said. "That is an 80-20 Tennessee Department of Transportation construction grant. The grant does not cover engineering and design."

The time constraints the Riverwalk project faced were impossible to meet "given the variables we were dealing with," **Ross** said. "We essentially returned that grant this year with strong assurance that we will be set up for the same grant next year," he said. "It's a timing thing." **Ross** suggested reallocating the \$100,000 to be used as grant money for downtown businesses to implement requests for improvements "that vary from awnings to signs to facades." Grants have been sought for the Dunbar Rosenwald School, the Rogers building, the Loudon County Chamber of Commerce and the downtown depot.

Councilman Tim Brewster asked if a notice would be given for the available funds in case someone wanted to apply. "I think this is a part of that," **Ross** said. "This public meeting is in a sense a beginning of that advertisement. We'll make the grant applications available as we always do. We didn't do an allocation this year, but we'll get the word out if the funding gets approves." "I think it's a good use of the money," Jeff Harris, Loudon mayor, added. "Those requests follow the guidelines of what we have established. ... And that money was just earmarked to take care of engineering, design and stuff for the Riverwalk so we should be reallocating it to be used by other businesses and nonprofits to apply for."

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

The News-Herald (TN)

February 26, 2020

Loudon Keeps City, Utility Manager Roles Married

Author: Parker Wright

A couple of weeks after Loudon City Council discussed separating the city manager and utilities manager roles, council voted Monday for **Ty Ross** to keep both positions. The item was initially not on Monday's agenda, but was later added at the request of Councilwoman Tammi Bivens. During the Feb. 10 workshop, she said the city's growth warranted a full-time manager. Loudon Mayor Jeff Harris addressed the issue first by asking Bivens how she planned to pay for the new employee. "I would like to open it up internally, see if we have any internal employees that would be interested in this position," Bivens said at the meeting. "... We have some lovely department heads and just employees in general. ... That would save us the money and the insurance right there."

Harris declined to let the audience speak despite protests from residents like John Franklin, who said the issue was "unbelievable" because it was added to the agenda at the last minute. Bivens and Councilman Tim Brewster motioned and seconded, respectively, to split the positions. The vote failed 3-2, with Harris and Councilmen Tim Dixon and Johnny James opposing. "I just felt that it would be in the best interest of the city to have our own city manager that can devote 100 percent of his time to grow in this city, and I think that's the next step for this city," Bivens said Tuesday morning. "... It's OK that it didn't pass. It doesn't bother me that it didn't pass. I just thought it was a good time to bring it up because it's almost budget season." "Loudon, our utilities are getting big and it's hard to have a manager trying to manage the city side of our city and trying to manage utilities, too," Brewster added. "We have a lot of stuff dropping through the cracks ... things that haven't gotten done."

Harris did not believe the city could financially support two separate positions. "No. 2, I don't think we need to do it because we have a person in place that's doing an exceptional job with both in both positions," he said. **Ross** said he was proud of the council's "vote of confidence." "I think that is tremendous progress given the totality of the circumstances," he said.

City OKs projects

Council also approved multiple improvement projects for the city's parks. One project is painting the roofs of four shelters at Riverside Park and the Maremont Shelter at Loudon Municipal Park. Quotes for painting these roofs have been provided by Obregon Painting. Painting the shelters at Riverside Park will cost \$9,990 and painting the Maremont Shelter will cost \$4,900, **Ross** said. The city also plans to install sod that is "drought resistant specialty material made specifically for ballfield use" in the infields at the four ballfields at Loudon Municipal Park that **Ross** hopes will be ready for this year's baseball season.

Loudon will also sprig the outfield at the park for \$10,000. "It (sprigging) is where instead of rolling out sod, they're plugged in, so to speak, to help the condition of the field," **Ross** said.

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

"This would be the sprigging of all fields at Loudon Municipal Park." The fourth project is paving the walking areas between the four ballfields in the municipal park. These areas often get "muddy and impassable" and concrete will make them walkable paths. East Tennessee Utility and Excavation quoted \$9,944.18 for the installation and other materials needed for the project. Concrete is not included. **Ross** said there is an existing agreement with VanHooseCo Inc., that can be used to access the 45 yards of concrete needed for the project. All four projects were unanimously approved.

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

The News-Herald (TN)

February 26, 2020

LUB Approves Insurance Rate Increase

Author: Parker Wright

Loudon Utilities Board moved forward Monday with its employee medical insurance plan. Board members Tim Dixon and Gene Farmer motioned and seconded, respectively, to approve a raise in funding. The vote passed unanimously. Before the vote, **Ty Ross**, LUB and city manager, referenced a metaphor he gave at the Feb. 10 workshop where funding for medical insurance was described as ketchup in a bottle. "The problem is the funding of the plan and the amount of dollars going into the ketchup bottle so to speak," he said. He recommended an increase in monthly contributions. **Ross** said in previous years there had been a slight increase in monthly contribution amounts, but this increase would be more drastic "to ensure adequate funding at the level of the plan's benefit going forward at least into next year."

Medical contributions at the individual level will increase from \$565 to \$688 and at the family level from \$1,680 to \$2,058. Dental contributions at the individual level will rise from \$30 to \$35 and at the family level from \$70 to \$105. Vision contributions remain at the individual level at \$8 and at the family level at \$20. The increases will raise the total annual funding from about \$2.8 million to about \$3.4 million. "There is a budgetary impact to that," **Ross** said. "It will require a budget amendment this year for the utility in the amount of \$131,440." March 1 is the renewal date with Humana.

Don Campbell, LUB chairman, raised concerns about changes to the medical insurance plan, which were discussed at length during the Feb. 10 LUB workshop. "So we're leaving the insurance as is?" Campbell said. **Ross** reassured Campbell, the board and the public that the current insurance plan would remain the same, with only the contribution amounts changing. He recommended council form a committee of members from the LUB, Loudon City Council, city employees and Loudon community members "in the coming months to explore future options for plan stability."

The News-Herald (TN)

February 12, 2020

Loudon Ranked Third Safest City

Author: Parker Wright

HomeSnacks recently ranked Loudon the third safest city in Tennessee for 2020. Using FBI Uniform Crime Report, the U.S. Census, OpenStreetMaps and other sources, the website collects data on violent and property crimes to determine which cities are the safest. Loudon ranked eighth last year. Loudon Police Chief James "Bear" Webb credits the community for the distinction. "We (Loudon) were ranked No. 1 in 2015, and since then it seems we are always in the top 10," he said. "No. 8 last year, so we moved up this year. But I do not think ... Loudon Police Department can take credit for all of it. Most of the credit should be to the people we serve." Because Loudon is a smaller community, there are more opportunities to build connections and relationships. "It's kind of a close-knit group in the town and they are active in several different avenues, whether it's the chamber or other civic groups, Rotary, Lions Club or something like that," Jeff Harris, Loudon mayor, said. "There's a lot involved in those groups, which helps."

Community relationships extend into the fire and police departments, Harris said. "Our police officers are so involved in the community," he said. "They're coaching softball or soccer. They're coaching baseball. They're so involved with the community because it's their community. Their kids are playing in this and that but they're just a hands-on type of department. "Close-knit, and they're really respected quite a bit in the community, too." In larger cities, there is a general "mistrust of institutions like police departments," **Ty Ross**, city manager, said. "I think it's just a lack of connection, a lack of understanding that causes that mistrust. The more proactive you are the better chance you have to avoid that," he said.

City fire and police departments take extra steps. "The (Insurance Services Office) is a nationwide organization that ranks fire departments, so it's an outside, third-party source that comes in and inspects everything, our firefighters, what they do, what type of equipment they have, where everything's located," **Ross** said. "They rank it, I think, from one to nine, one being the best. "We (Loudon) just moved up from class 4 to class 3." Harris said the change benefits residents by potentially reducing homeowner's insurance premiums. "Chief Webb and other members of the staff are in Nashville looking into state accreditation, and that's similar to ISO where an outside, third-party source ... and have certain criteria and standards for law enforcement and those would be reviewed and checked upon with the Loudon Police Department," **Ross** said. "Our people have placed our leaders, the mayor, council, the manager, myself and all the employees of the city in our positions to serve," Webb added. "With the people we serve, we all work together to make Loudon the best place to live and raise families."

Internet – Newspaper Archives Searches

James Tyson Ross

(Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **Tyson Ross** is listed below.]

<https://www.loudonutilities.org/general/energyright-solutions-award/2019>

EnergyRight Solutions Award

Loudon Utilities was recently recognized in 2019 as a top performer in the Tennessee Valley Authority EnergyRight Solutions and New Homes program.

This is the fourth straight year in a row LUB has received the award and the only utility in the TVA Southeast area to qualify for the award.

From left: **Ty Ross** LUB general manager;

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

The Connection (TN)

December 19, 2019

LUB Considers Timeline for Move

Author: Jonathan Herrmann

While Loudon's new city hall is months from opening, Loudon Utilities Board during a workshop Dec. 10 discussed the possibility of a faster timeline on its new customer service center. The customer service center, which will occupy the old Capital Bank building on Highway 72 in Loudon, is nearly operational with a majority of information technology infrastructure installed and security systems up and working. "It is that department's (customer service) desire to move into that building and let's get it open sooner rather than later," **Ty Ross**, LUB general manager, said. "There are a couple of big things that we're needing to finish up. One is the technology. We want the customer experience once they step in line to sign up or receive service to be smooth. We're also getting the last of our quotes for the signage on the building as well as the standalone sign in front of the building."

Two of three bids for signage have been received, Gregg Hensley, customer service director, said. Hopes were to receive the final bid Dec. 11. Once signage is approved and ordered, it would take four to six weeks to get everything in place, Hensley said, which would make the move-in date in January or early February. Jeff Harris, city mayor, floated the idea of purchasing a banner to use as temporary signage until a permanent solution is available, allowing the move to take place sooner. "I would go along with that," Don Campbell, LUB chairman, said. "I would want some kind of sign personally."

The technical aspects of the move have been planned once LUB gives the go-ahead. "There's an extra computer in customer service that I'm going to take out there first, plug up and make sure everything is good," Hensley said. "Then one of the cashiers and make sure that's good. Then once we decide to move and close that Friday, that Saturday we'll move everything else out there and work and we will be ready for business Monday morning."

Staff voiced willingness to work on a Saturday to help facilitate the move, Hensley said. The only other obstacle would be to notify the public of the transition so there is no confusion about what services are available at which facility. "We're wanting to possibly put some notes in the utility bills," Hensley said. "We've already sort of got it on the website but once we agree to a date we can put it on there. A lot of our customers are asking, 'Hey, when are you moving?' So it's known."

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

The News Herald (TN)

May 22, 2019

Loudon Approves Tax Bump

Author: Jonathan Herrmann

A week after the possibility of a property tax increase came up, Loudon City Council approved the hike Monday during its regular monthly meeting. The 6-cent increase will raise Loudon's property tax to \$1.2367 per \$100 of assessed value. "As far as voting for this tax increase, it has to do with funding for street repair, street paving and infrastructure work," Tim Dixon, councilman, said. "That might even be earmarked for that only. We will not be able to take that money out as long as this council is here to be able to use for any other purpose. It will only go for what we have said it will go for."

Councilman Tim Brewster raised the possibility of the increase during a May 13 workshop to cover the costs of paving. He estimated an 8-cent hike would provide \$216,000, which could pave 2.5 miles of city roads, while 12 cents would provide about \$304,000 for 3.5 miles of paving. Council settled on a 6-cent increase, which **Ty Ross**, city manager, said would be part of a \$2 million paving budget for the 2019-20 fiscal year. "There is new spending for infrastructure and paving," **Ross** said. "The budget includes \$2.6 million spending on infrastructure and equipment, 76 percent of which is for long overdue paving." The total new revenue from the tax increase is estimated at \$160,000, which **Ross** said would be leveraged with about \$800,000 in state grant aid and \$400,000 from Loudon Utilities Board to funding the significant increase in paving spending.

The city also plans to pave the parking lot at Loudon Municipal Park, which is currently gravel. While the first reading of the tax increase passed unanimously, Johnny James, councilman, said he hoped to repeal the increase prior to the next city election in 2022. "I feel like most of the people I've talked to, they were for it, but the next question out of their mouth is, 'What happens when all the infrastructure is done and the improvements are through? Will the tax stay on?'" James said. "Well, I don't want it to stay on. When we're through and we've done what we wanted to accomplish ... then there's no need to keep taxing you all." Council also passed the first reading of the city's 2019-20 budget.

In addition to infrastructure spending, the budget included an additional public works employee, \$75,000 for radio upgrades for the police and fire departments, an additional patrol officer for the police department, \$100,000 for preliminary engineering and federal permitting for a riverwalk in downtown Loudon, a 2 percent salary increase for employees and a funding formula for the employee benefit plan. "It took a long meeting on Wednesday, but I think we had some good feedback, some good ideas and I think we accomplished quite a bit with our budget as far as the funding goes," Jeff Harris, mayor, said. "I think paving and maintenance and some of those things were priorities and I think we addressed those."

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

The News Herald (TN)

April 10, 2019

Loudon Considers Residency Requirement

Author: Jonathan Herrmann

Loudon City Council during a workshop Monday discussed whether changes should be made to a city rule that requires local residency for employees. Under the current ordinance, city workers are required to establish permanent residency in Loudon County or an area served by Loudon Utilities Board. **Ty Ross**, city manager, presented council with a copy of the current ordinance as well as the policy of Loudon Utilities Board, which allows for hiring outside the county at a "normal commuting distance" in areas where technical or managerial expertise is required and there is not a qualified local candidate. "This flexibility has only been used on the utilities side once and it was for the hiring of an electric engineer," **Ross** said. "He lived just beyond the county boundary to the north."

Councilman Tim Dixon wants the change to allow Loudon to hire the best people possible. "I'm a local guy and I'm always for hiring local people, but when you get into an incident like is on this list, it could require you to go a farther out distance to get what you need," he said. "I'm for us looking into it and changing our policy." The biggest question raised was how "normal commuting distance" would be defined. Councilwoman Tammi Bivens and Mayor Jeff Harris were in favor of keeping the definition flexible. "What if you say 45 minutes but have a person an hour out that is perfect for the job?" Bivens said.

Dixon and Councilman Tim Brewster were in favor of a more clear definition. Brewster questioned whether someone could be hired who lived in Cookeville. "It should be at our discretion I think," Brewster said. Harris disagreed, noting he didn't think **Ross** would make that kind of decision. "I would leave that to the manager's discretion," Harris said. "I think make it a little more general where he has the decision-making. ... The general manager does all the hiring. It's clear in our charter who makes those decisions."

Ross detailed the way in which he would make such a decision should it arise. "Loudon County is shaped like a triangle," he said. "I draw a circle around Loudon at a reasonable radius and look at commuting times. It's different for each person. You've got to take that into account and make a management decision." Bivens asked that council hold off on the change until the new city and LUB handbook — currently going through a feedback stage — is approved. **Ross** agreed to have an updated version of the handbook with the change to residency requirements available Monday when council holds its regular monthly meeting. "We may not be able to approve it by the next meeting, but we can start looking at it," Dixon said.

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

The News Herald (TN)

April 10, 2019

LUB Approves Highland Utility Work

Author: Jonathan Herrmann

After approving in February a contract with W.K. Dickson & Co. Inc., to perform design and bidding services on Highland Avenue to replace water and gas infrastructure, Loudon Utilities Board voted April 8 to accept the low bid on the project. The decision during a brief special called meeting allows LUB to stay well ahead of schedule. "We're going to hold a pre-construction meeting early next week," Ryan Blake, vice president and Knoxville regional manager for W.K. Dickson, said. "Right now they're getting together their bond information and insurance certificates. So typically that takes a few days. We anticipate probably in the next three weeks. Originally we were aiming for a June 3 start date, so we should be able to significantly beat that."

Three bids were submitted for the project. Adams & Sons Inc., came in as the low bidder at a cost of \$1.09 million. Garney Construction came in at about \$1.38 million and Hurst Excavating came in just shy of \$1.43 million. The project would replace old water and gas lines along Highland Avenue before resurfacing work by the Tennessee Department of Transportation later this year. "We're trying to get ahead of it and replace those lines," **Ty Ross**, LUB manager, said. The completion date for utility work is Oct. 1. Officials hope work will be completed ahead of schedule, but much of that is dependent on weather, Blake said. Bart Watson motioned and Tim Dixon seconded to approve the bid.

Watson did ask about funding and whether a portion covering gas work — \$454,021.40 — could come out of funds available in the gas department rather than having to borrow the full amount. "The gas department has got the money to pay for it," Watson said. "Instead of borrowing money when we've got money, just borrow the water money. ... You're getting less interest." Gene Farmer questioned whether there are future projects needing that money from the gas department. **Ross** agreed to work with the accounting department to figure out the best way to fund the project, which will be brought before the board at a later date. "That's just what I wanted to put on the table," Watson said. "I'm good with going ahead and getting this done."

LUB previously approved about \$95,000 for the project to contract with W.K. Dickson to provide engineering and bidding services. Part of that funding included \$17,000 for permitting with the Department of Environment and Conservation and Norfolk Southern for crossing railroad tracks.

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

[CB&A Note: We asked Mr. **Ross** about this investigation, his response follows.]

“There was a feral cat colony in the city and an employee of mine acted lawfully, but without my knowledge, by working through the humane society and county animal control to remove the population from an abandoned industrial site marked for demolition. A member of council, Tim Brewster, who suffers from a well documented mental illness which grants him full disability, reacted impulsively without all the facts. The city's attorney (Joe Ford) reacted out of scope in my defense and therefore resigned. After a short investigation uncovered absolutely no wrongdoing I was reinstated and the matter was closed. The junior partner (Kris Frye) of prior attorney Ford was appointed by the city council.”

The News Herald (TN)
April 3, 2019

Loudon Reinstates Ty Ross, Ends Investigation

Author: Jonathan Herrmann

Two weeks after Loudon City Council voted to suspend City Manager **Ty Ross** and launch an investigation into employment practices at city hall, both decisions were rescinded Monday during a special called meeting. Council went behind closed doors March 18 with attorney Ben Cunningham from Kennerly Montgomery, a Knoxville-based law firm, to discuss actions taken by **Ross** and city staff regarding a feral cat colony living near the former Hutch Manufacturing property. Allegations were made that **Ross** acted in an aggressive manner toward Cissy Chapman, who had been feeding the cats. Several cats were later euthanized after being trapped by city employees, which **Ross** denied having knowledge of before it happened. During the closed door session, Joe Ford, city attorney, resigned. Council emerged to take two votes — one to suspend **Ross** and one to launch an investigation into “practices of city hall employees and offices to verify that everything is either being done correctly or what needs to be changed.” Jeff Harris, Loudon mayor, reached out to the state comptroller’s office with concerns that the closed-door session violated the open meetings act. “His opinion of it is ... there was a violation based on what information he has,” Harris said in a previous interview, adding that decisions made were null and void.

As a result, Monday’s meeting was arranged with three items on the agenda — appoint a city attorney, reinstate **Ross** and end the investigation. All three passed unanimously. “This is just something that had to be done,” Harris said. “I don’t think anybody intended for the meeting two weeks ago to go the way it went. It just kind of escalated and snowballed honestly and went kind of in a direction nobody really intended. I don’t think there as any ill will intended, but that’s where we wound up. “It was just very important to show **Ty Ross** that he’s got our full support and that we’re all behind him,” he added. “According to all the council members we talked to, they regret that it happened and now we’re ready to put it behind us and move forward. We had to get past this and now I think we can be stronger because of it.” Council first discussed appointing a city attorney. Ford asked council to reappoint his firm, Ford & Nichols, with staff attorney Kris Frye serving as the new city attorney. “It was a bad set of circumstances with me

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

standing on a sidewalk with me on speaker phone when that resignation came down a couple weeks ago,” Ford said. “We’ve all had time to think about it. ... It really was a last second thing that came up that I didn’t get a lot of time to announce that I wouldn’t be here. I hate that it happened. “We have many projects with the city that we have a great working relationship with the city on,” he added. “We’ve got all the title searches done on the Queener Road project and we are ready to move and start closing on those properties. Several things we’ve got going on with the city that we would like to see through.”

Tim Brewster motioned to appoint Frye, which was seconded by Johnny James. The vote passed 5-0. The only question was from Tammi Bivens on whether Frye would attend all meetings and workshops, which he agreed to do. The vote followed to reinstate **Ross**. Brewster again motioned and Tim Dixon seconded, with the vote passing 5-0. Brewster made the motion to suspend **Ross** two weeks earlier. “The biggest thing from two weeks ago was we didn’t know the city attorney wasn’t going to be here,” Brewster said after Monday’s meeting. “That caught us off guard and basically we did what we thought was right. We had to go with what we thought was right.” Harris believed the decisions made during the March 18 meeting were unfair to **Ross**, who he called “one of the best things that has happened to Loudon in many years.” “His leadership qualities and integrity are both at very high levels,” Harris said. “He has a great vision for Loudon and if we will all get behind him and support him, great things will take place in our community.” Brewster called the last two weeks an “eye opener.” “I mean, **Ty** is a good man,” he said. “He’s good for Loudon, but he’s got to communicate with city council. We’ve got to know what’s going on. We can’t wait for the meeting to find out what’s being done in Loudon.”

Council then voted to rescind the investigative authority given Kennerly Montgomery. James motioned and Bivens, who initially made the motion to investigate, seconded. Bivens noted that she still had concerns she would address directly with **Ross**. “Loudon’s got to move forward,” Brewster said. “We’ve got to make some progress. We’ve all got to get on the same track. The city manager works for city council. The city council is elected. We get the complaints.” Harris hopes council can learn from what occurred two weeks ago. “What I want to do is follow up with this and have maybe a retreat or some time spent together ... on ethics and the open meetings act, get trained in that and cover that in more detail amongst all of us,” he said. “This can be an opportunity that brings us closer together.” Council briefly discussed moving forward with a previous plan for a committee to come up with a plan of action for future situations involving feral cat populations in the city, which was originally a recommendation of **Ross** during the March 18 meeting. **Ross**, after the final vote, offered an olive branch to Chapman with a public apology and the opportunity to provide input with the committee. “I want to apologize to you publicly a second time,” **Ross** said. “As stated previously, I’m willing to work with you on a means to resolve this issue down the hill for the betterment of all involved, human beings and animals. I’m serious when I said I would like to do an advisory panel and we’re going to find a solution to this. I welcome your input.” Chapman said she knew solutions could be found. “If I can be helpful with that, I would gladly do that, but we need everybody on the same page and we need everybody going in the same direction,” she said.

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

News Herald (TN)

March 20, 2019

Loudon Suspends Manager

Author: Jonathan Herrmann

Before Loudon City Council could tackle planned items on its agenda Monday night, members voted to suspend City Manager **Ty Ross** and City Attorney Joe Ford resigned. Mayor Jeff Harris opened the meeting with public comment. Council chambers were standing-room only and residents stood shoulder-to-shoulder in the hallway trying to listen through open doors. What drew the crowd was an incident related to feral cats on the riverfront property owned by Loudon Utilities Board that includes the old Hutch Manufacturing buildings and a former residence. Cissy Chapman, a resident of Lenoir City and Loudon property owner who has been feeding the cats for the last few years, spoke to council for more than 30 minutes on encounters she has had with **Ross** dating back to December and actions taken by city employees in regard to the cats. Chapman said **Ross** was combative, disrespectful and threatening. She recounted **Ross** threatening to have her arrested and waving his hands in her face. Chapman believes because she was on a portion of the property without a no trespassing sign posted she was well within her right to be there. "Feeding cats is not a criminal offense, so I didn't know what offense I had actually done," she said. "... He was ordering me from the property and I was to leave and not return. I did tell him that I didn't think he had authority to do that. I still don't think he has authority to do that, to order anyone off property that is not posted." She recounted a second encounter when **Ross** offered an apology but still acted in an aggressive manner.

Chapman found in recent weeks that the number of cats showing up for feedings dwindled from more than 20 to just a few. After noticing the decline, she stopped at Loudon City Hall and met with **Ross** and secretary Meghan Hull, who both indicated no knowledge of the dwindling numbers. Chapman said she later learned that Hull and Travis Gray, codes enforcement officer, had trapped and delivered the cats to the Loudon Animal Shelter where they were euthanized. "That's not right," she said. "The cats were at home where they and their ancestors had been for 70 years. I feel I had been intimidated." Chapman also claimed ownership of the cats. "According to the law, anyone who feeds an animal 10 consecutive days can consider that animal to be their property," she said. "I wasn't looking to own cats. I had never verbalized that they were my cats. I did feed the cats. I had been feeding those cats between a year and a half, two years. "... I've never been so heartbroken," she added. "I'm sorry, but I've been feeding these cats, like I said, for two years. In a 10-day time frame, today I can say that those were my cats, and I feel like this is either at (**Ross**') knowledge, I don't know that, but I feel like with his knowledge gave the OK for this to happen." Harris noted that in an email from Hull to **Ross**, Hull claims to have captured the cats without the city manager's knowledge. Hull was reprimanded for the action. Others in the audience provided opinions, some in support of having the cats removed from the property and some opposed. One individual doubted the account of **Ross'** actions. With permission from Harris, **Ross** shared that he approached Chapman and asked respectfully that she stop feeding the cats. "My encounter with Mrs. Chapman went south very quickly and it was very short, inside of two minutes, because it went so negative, so fast," **Ross**

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

said. Chapman and **Ross** both noted that she had a conversation with former mayor Jim Greenway after the first encounter. As a result, **Ross** said he made an effort to apologize. “(Greenway) explained to me that she was upset,” **Ross** said. “He explained to me who she was because I didn’t know her from the next person and that this is a person that, ‘You need to deal with, **Ty**.’ “... The next time I saw her out there with my own personal eyes, I went to her and apologized directly,” he added. “An apology is an art, and I apologized to her and for telling her what to do and for breaking her routine and for causing her heartache. I apologized for those feelings she was having and under no uncertain terms. There she shook my hand and she accepted my apology.”

Chapman denied accepting the apology.

Since the second encounter, **Ross** claimed to have stepped away from the issue. “The police department did have encounters with her and there is audiotape of how — body cameras — of how she interacts with people in conversation, and it can be belligerent,” **Ross** said. “It can be hostile. It can turn negative very quickly. There’s body cam footage and recordings of this.” **Ross** said Hull told him she had an idea for dealing with the cats on the property but that he did not need to be involved. Due to Hull’s experience serving on the Loudon County Humane Society, **Ross** trusted her to handle the issue appropriately, he said. “I pulled away from it,” **Ross** said. “This is not something I leaned into. I trust Meghan. I’ll defend her until my dying breathe. She’s a kind-hearted woman. I’m a better person for having known her. I knew that she had an animal’s welfare in her heart. “At the end of last week, criticism arose of how she was handling the situation,” he added. “I did what managers do. I inserted myself into the situation and I asked her to cease and desist until we can figure something out. To make sure it stopped I got HR involved and we documented it.” **Ross** suggested forming a committee to put together a plan of action for similar situations in the future. Council later agreed to come up with a plan for forming the committee.

Executive session

The meeting took a turn when Tammi Bivens pushed for council to enter executive session despite the absence of city attorney Joe Ford. “Before I knew our attorney wasn’t here I had gotten some complaints about things our attorney had put on Facebook that may have shown a little bias,” Bivens said. “I took it upon myself to contact an attorney that I am familiar with, with Kennerly Montgomery & Finley out of Knoxville, and they have so graciously supplied us with someone to come in and hear this executive session as an outside attorney, unbiased opinion, doesn’t live in the county, doesn’t live in the city, doesn’t have any privilege to this information.”

Harris argued against going into executive session under the opinion it would be inappropriate without the city attorney present and believed it would be a violation of the open meetings act. The act states that “all meetings of any governing body are declared to be public meetings open to the public at all times, except as provided by the Constitution of Tennessee.” A meeting is defined as “the convening of a governing body of a public body for which a quorum is required in order to make a decision or to deliberate toward a decision on any matter.” According to the Tennessee Coalition for Open Government, there are exceptions for attorney-client privilege,

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

litigation or pending litigation. The attorney present, Ben Cunningham, claimed Monday's executive session was in compliance. "Executive session allows the board, the city to come into a private, closed setting to discuss matters that may not be for the purview of the public," he said. Cunningham claimed the session could be used for "anything that is sensitive to discuss." Members of the audience questioned whether council could claim attorney-client privilege as Cunningham is not the city attorney.

Council ignored all warnings and opposition to the session and voted to go behind closed doors. Harris was the only vote against entering executive session. When questioned why he was in attendance, Cunningham said he attended at the request of council members. He would not clarify if he was invited by multiple members. Had multiple members planned to bring Cunningham to execute an executive session, that could constitute a violation of the open meetings act, which does not allow two members of a governing body to discuss such matters even during a chance meeting. "No such chance meetings, informal assemblages or electronic communication shall be used to decide or deliberate public business in circumvention of the spirit or requirements of this part," the act states. Harris believes that was the case. "I don't feel comfortable doing this, personally," he said. "I don't think this is the right approach to take. It seems like there's been some discussions outside of here with individual council members, too. This didn't just happen. So I think there's already been some violations of the open meetings act. ... It's very unfortunate that that has taken place."

Suspension of Ross

After a lengthy executive session, the meeting reconvened. Harris announced that he had received communication from Ford that he was resigning, effective immediately. Ford did not provide a reason for his resignation, Harris said. Bivens then made a motion that the city hire the law firm represented by Cunningham to investigate the "practices of city hall employees and offices to verify that everything is either being done correctly or what needs to be changed." Brewster seconded the motion. Harris was the only opposition. Following the vote, Brewster made a motion to suspend **Ross** as city manager, with pay, until the investigation is complete. Bivens seconded the motion. Harris again was the only opposition. "I'm sorry that it's come to this, but this is where we are," Harris said. **Ross** will continue his duties with Loudon Utilities Board unless that body chooses to take action. Bivens said the decision to suspend **Ross** and begin an investigation was not related to the issue with the cats. "This investigation is due to employment practices that we have deemed to be possibly irresponsible, neglect, whatever," Bivens said. "So this is not due to the animals." Audience members asked why the investigation was launched if not due to the animals but council would not provide an answer until the investigation is complete. "This was an unfortunate type meeting," Harris said. "I was not aware that this was an attorney that was present. I was not aware of that, not made known of that until it just came up." Members of the audience left as council moved into regular business. Multiple audience members criticized Bivens and Brewster. "City council, take a look at the voters who are leaving," Roger Nash said. "Shame."

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

The News-Herald (TN)

January 16, 2019

Loudon Tackles Insurance Worries

Author: Jonathan Herrmann

After internal discussion of potential changes to the employee insurance plan for the city of Loudon and Loudon Utilities Board was met with overwhelmingly negative response, officials put on the brakes Monday. The city looked at a change in insurance plans to save money since the medical benefits fund that pays for employee health care has dropped from \$1.49 million in June 2015 to \$574,550.50 in December. "The insurance fund that we use to fund our health care, it's a self-funded plan," **Ty Ross**, city and LUB manager, said. "As we all know as Americans, health care costs continuously go up, but we've been funding that plan at basically the same level since the year 2011. So you have a single line of funding and health care costs going up — that causes the fund to deplete."

After getting feedback, officials opted to leave the plan intact and have the city and LUB absorb additional costs. "I would also like to say that I apologize to all the employees that it caused undue stress to," Tim Brewster, city councilman, said. "We were in just as much a shock as you were." The fund must be addressed moving forward, officials agreed. "I think that what we were going to save by doing that plan we can save in the upcoming budget, which I am on board with," Tammi Bivens, city councilwoman, said. "But I do hope the department heads are ready to take a good, hard look at their budgets this coming time and start thinking about where we can cut, where we can make money, things like that." Bivens also suggested shopping the insurance plan early next year with various brokers and companies to look for the best option.

The city did look at options from BlueCross BlueShield but could not match the structure of the current plan, **Ross** said. Brewster encouraged employees to take advantage of options within the current health plan that can save money, such as Teladoc, a program that provides remote medical care via mobile devices, the internet, video and phone. "Start saving us money on insurance," Brewster said. "We've got real good insurance, but if you stub your toe or your child sneezes, don't run to the emergency room. Let's start looking at ways we can start saving ourselves some money and keep our good insurance, keep our good benefits."

Stephanie Putkonen, city recorder and treasurer, stressed the situation wasn't bleak regarding health care funding. "We're not broke," she said. "We're just having to address it now." Hopes are to come up with a funding solution during the next year to avoid future plan changes. "If we have to come up with a different plan, we want you all to know that we did everything we could to keep the best plan," Bivens said.

EDA in question

One cost-saving measure for the city surfaced Monday when Brewster recommended Loudon re-evaluate involvement with the Loudon County Economic Development Agency. "We are paying the EDA big money every year and we're not getting nothing for it," Brewster said. "What I'm

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asking the council body to do is take a look at what we're doing. We're furnishing ... that office, the value of that office is \$219,000. It's sitting in the industrial park across, big two-story house, glamorous house. We're letting them use that. The average utility bill over there is \$400-\$500 a month for two people, which is ridiculous. So what I'm asking us to do is let's take a look."

Brewster criticized Jack Qualls, EDA executive director, for recent proposals brought before the city, which included a foam manufacturing plant in the Centre 75 industrial park. The company has backed out. "He came to this council and said, 'Yep, they're coming. Sign the papers; they're on their way'," Brewster said. "They had already bought a property in South Carolina a month before."

Jeff Harris, mayor, pointed to a two-year notice required for the city to withdraw from the EDA. "It says to give them a two-year notice, but whoever wrote the contract did not put in there what happens if you don't make the two-year notice," Brewster said. "So we can't wind up suing ourselves. If we want to pull out, we can pull out." **Ross** noted the request and encouraged council members to speak with EDA representatives. "I take your request at face value for what it is and I think it's a legitimate request of this body to take assessment of the EDA and its activities," **Ross** said. "I think that can only be properly done by having your own consultation with the EDA personnel."

Johnny James, city councilman, agreed with Brewster. "We need the approval of the EDA to be able to move forward yet we don't have control of that board," James said. "We have three votes. The majority of those votes is on the Lenoir City side. We're in a situation where we can't control our own destiny no matter what we do. ... To get into an agreement that you don't control your own destiny, that's foolhardy." **Ross** said he has asked Qualls to give city council quarterly updates. Qualls was not in attendance Monday.

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

The News-Herald (TN)

December 19, 2018

Loudon Agrees to Bond Issuance

Author: Jonathan Herrmann

After months of discussion during Loudon Utilities Board meetings, Loudon City Council agreed unanimously Monday to issue tax exempt revenue bonds worth \$8.6 million for the water and sewer departments. The vote came after LUB passed a resolution recommending the action. "This has been an issue in the works since actually the year 2012," **Ty Ross**, city and LUB manager, said. "We've been working on this since October." The bonds will total \$8.6 million at a fixed interest rate of 3.35 percent for a 15-year term. The closing on the first \$5 million will occur before the end of the year, with the other \$3.6 million in 2019.

Loudon is taking on the debt to refund the sewer department's facilities reserve fund at \$1.2 million, as well as an interfund loan from the sewer department for \$3.4 million. Additionally, the debt will fund \$400,000 from the sewer department for paving, \$1.88 million for both the water and sewer departments for a supervisory control and data acquisition system and automatic metering infrastructure, \$425,000 for rehab of a sewer line on Highway 11 and Maremont Parkway and \$100,000 for engineering sewer projects. An additional \$1.18 million will be left for future water and sewer projects. Tim Dixon, councilman, asked what was planned for the additional projects. "These are yet to be identified projects," **Ross** said. "We do have an aging system and we know we will continue to have problems. We know there may be instances in the future where new industry causes our water and sewer plants to expand. These funds would be available for that and will be returned to the utility board to explain exactly how that money would be spent."

STI, Institutional & Government, Inc., an affiliate of SunTrust Bank, intends to purchase the bonds. During a November LUB workshop, **Ross** said the debt issuance would need to happen before the next principal payment of \$683,333 for the interfund loan to the gas department came due in January. Bart Watson, LUB board member, expressed hesitancy during both the November and December LUB workshops about taking on the debt. Watson questioned whether it would be possible for the gas department to pay back the sewer department without taking money from a third-party source. "I think from what **Ty** and me have talked about, there's time constraints with it, but we don't know exactly what those time constraints would be at this time," Watson said during a Dec. 10 workshop. "... But if we go ahead with it, and I know council will vote on it, but there's no backing up because we cannot pay off early."

There was discussion in November that paying back internally may require someone to be contracted to oversee the repayment, with Watson noting it can be "complicated." LUB voted unanimously Monday to recommend the bond issuance without further discussion. "The debt coverage ratio is more than adequate to handle this debt for the water and sewer department," **Ross** said during a November workshop.

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

The News-Herald (TN)

October 10, 2018

LUB Considers Hutch Tank Removal

Author: Jonathan Herrmann

Loudon Utilities Board members discussed during a Monday workshop a bid for removal and closure of two underground storage tanks on the former Hutch property. The two tanks — a 10,000-gallon diesel tank and a 20,000-gallon heating oil tank — must be removed before development can take place.

LUB received a proposal from Strata Environmental, which conducted initial surveys on the property before it was purchased by LUB, for cost of the removal and closure. "Their proposal includes pre-removal activity, securing the permits from the state to remove the tanks, the project management of working with contractors for tank removal and then the closure process of the underground storage tank facility through (Tennessee Department of Environment and Conservation)," **Ty Ross**, LUB manager, said.

The cost for removal, including Strata management and fees, comes in at \$34,204, with the low bidding contractor being USTanx LLC. The second lowest bid was Gatlin Services at \$35,874. There was no timeline provided for the work. "They'll remove them, of course, and then they have to take samples out of the soil at four different locations inside the excavating site," Johnny James, board member, said. "Then you got to wait for it to be tested, and if it comes back positive you're good to go. If it comes back negative you've got to dig it up and take another set of tests. It's really something where it would be hard to put into a bid because you don't know what you're going to find." Costs for additional work could include disposal of contaminated soil, extraction of fuels and water from tanks and placing and compacting clean fill dirt. USTanx costs for the services came in at \$75 per ton of soil, \$1.25 per gallon of fuel and water and \$35 per ton of fill dirt. Gatlin's charges for additional work came in at \$54, \$1 and \$22.60, respectively.

Gene Farmer, board member, expressed concern over moving forward with the project before gaining a better idea of the scope of additional work and how that would change the overall cost. He also suggested holding off on the work until LUB is ready to move forward with development of the property. "If we're looking at development ... would we be best fit to take a project like this and when a development plan comes together make it part of a development cost instead of doing it now ... as a standalone cost to the utilities?" Farmer said. James believes there are advantages to moving early on necessary remediation. "I don't think I would want to wait until I was ready to start work on development," James said. "... I would rather know it's clean before we ever decide about any development." **Ross** agreed to move toward a better estimate of costs for additional work. James suggested looking into organizations that may come in and pay for the content of the tanks rather than LUB paying for it to be removed.

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

Plans are to have more information ready when LUB holds its regular meeting Oct. 22. "This is the removal of the first impediment," **Ross** said. "The next impediment would be the asbestos abatement. They're working on completing a complete and thorough measurement survey of everything that's inside the building so that their cost estimate, which was between \$150,000-\$200,000, can be firmed up and we can bring that to you like we've done with the underground storage tanks with actual numbers to show the cost of the work to be performed. We're not there yet on the asbestos."

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

The News-Herald (TN)

July 11, 2018

Loudon Discusses Dangerous Building

Author: Jonathan Herrmann

Loudon City Council during a workshop Monday talked about what action may be taken regarding a building at 307 Gay St. deemed dangerous. **Ty Ross**, city manager, requested council vote Monday to allow **Ross** and Travis Gray, codes enforcement officer for the city, to "shore up" the property before moving into a 30-day period in which the property owner would need to take action. The property owner could request a hearing with council during those 30 days.

"It's owned by Bob Stone, and it's a situation where if we don't do something soon then persons or property could be damaged," **Ross** said. "I can't emphasize that enough. ... It's a situation where it grows worse day-by-day. I don't know if it can survive the next storm. It certainly will not survive the freezing and thaw that's coming this winter. "... Mr. Stone understands the process that we'll have to take action and this public action will result in a lien against the property, which could cost him money down the road," **Ross** added. "We've encouraged him to seek a private solution. That is our preference as a private market could handle this better than the city. He's working to that end, and we hope he's successful, but we have to be in a position to act, otherwise persons or property can be damaged."

Council agreed action must be taken but urged caution and asked that the property owner be notified in writing well in advance of steps taken by council. "We need to move ahead, but at the same time, I don't think that a verbal notification would be binding in court," Johnny James, councilman, said. "It would have to be by means of certified letter. He has to be given time to respond to it. You can't just say, 'Here's this letter today, we're doing it tomorrow.' That ain't going to get it. I'm telling you it's not." **Ross** and Gray assured council proper notice would be provided. "Initially, we're requesting that you give me the authority to do an emergency action to shore the building up," Gray said. "He has five days to comply from the board's declaration, which would be Monday night. ... We're shoring the building up for the short term because the immediate danger is there. We're taking away the immediate danger and then going through the process completely." Gray estimated emergency repairs would cost at least \$2,000-\$3,000. James believes the cost would be higher.

Internet – Newspaper Archives Searches
James Tyson Ross*(Articles are in reverse chronological order)*

The News-Herald (TN)
June 27, 2018

Loudon Passes City Budget

Author: Jonathan Herrmann

Loudon City Council Monday night voted to accept the second reading of its 2018-19 fiscal year budget with one small amendment beforehand. During the public hearing before the meeting, council was questioned on whether any money would be allocated to the sign and awning commercial grants under the courthouse square revitalization fund. There had been nothing budgeted for signs and awnings as that portion of the fund had been depleted. "What was in last year's was the balance of an original \$100,000 that was appropriated for the entire program about 10 years ago," Stephanie Putkonen, city recorder and treasurer, said. "We only had \$18,666 is what was budgeted last year. We've actually gone over a little bit. The ones that were budgeted in May actually took it over by about \$700."

Ty Ross, city manager, recommended allocating \$20,000 from the overall courthouse square fund to signs and awnings as an amendment to the budget prior to voting, "given that recent experience and what we're projecting in the future." Currently there are three new businesses in the courthouse square area that hope to take advantage of the grants. "Based on comments made at tonight's public hearing as well as feedback from council, I'm recommending a revision to your agenda memo," Robss said. "The budget ordinance, second reading, item one describes the courthouse square revitalization fund. We'll strike 'reduced the sign and awning grant to zero' and add in, with the added revenue and expenditures for the tourism grant, to also include the sign and awning grants in the amount of \$20,000."

The budget passed, as amended, by a vote of 4-0. Councilman Jeff Harris was absent. "It needs to be done, especially with new businesses coming in," Jim Greenway, city mayor, said of the amendment. Overall very little changed in this year's budget from the year before. **Ross** has touted the year's budget as a simple one. Council also voted to keep the tax rate the same as the year before at \$1.1767 and to amend the pay classification for restructuring of positions discussed at the council's workshop earlier in the month. "The city recorder and treasurer position was combined with ... the (Loudon Utilities Board) paying 25 percent of that salary," **Ross** said. "We also added an accounting clerk position with the city and utilities equally sharing the cost."

Changes were made to pay classifications with the public works department as well, reducing the laborer position from classification five to four, and raising the skilled laborer position classification from two to three. A 2 percent raise was also given to city employees.

Additionally, six "long vacated" positions were removed from the pay classification in what **Ross** called a "housekeeping" measure.

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

The News-Herald (TN)

March 28, 2018

LUB Approves City Hall Purchase

Author: Jonathan Herrmann

Loudon Utilities Board voted Monday to move forward with purchase agreements for two vacant properties on Highway 72 at a cost of about \$1.9 million. The former UT Medical Plaza would be used as LUB headquarters and Loudon City Hall, while the Capital Bank building would become the LUB customer service center. Both buildings are on Highway 72 near Food City.

"What this contract does is open up what's called a feasibility period," **Ty Ross**, city and utility manager, said. "So over the next 60 days and extendable for another 30 days ... we will do our due diligence. We will get into the property and determine whether or not it's suitable for our needs. We've already lined up an architect and a commercial builder who will provide us with solid estimates. What you have up to this point are basically armchair estimates. So we'll be following up during this feasibility period with some harder numbers for you to understand before ultimately deciding to close the transaction."

The UT Medical building would cost \$1.339 million, which was negotiated down from an original asking price of \$2 million. The Capital Bank price tag is \$589,000 after an original asking price of \$1.09 million. "There was a lot of back-and-forth between our broker and the property owners of both the properties," **Ross** said. "The UT building in particular, what we got down to was the \$1.339 (million) number, which was the assessed value of the property. It was sort of a number that the seller did not want to go beneath." The Capital Bank building has an assessed value of \$1.2 million and includes two additional acres undeveloped behind the facility.

A projected city hall project on the Hutch property in downtown Loudon would have cost about \$5 million "five or six years ago," Don Campbell, LUB chairman, said. "There's no telling what the building would cost today for the same building," he said. "We feel like we're saving the city bookoodles of money by going to the 72 site and still leaving this Hutch property ... for developing the whole thing."

The biggest question facing LUB in the potential purchase is a decision by UT Medical, which still pays rent on the building and has a right of refusal on the property. UT has 30 days to negotiate a potential purchase of the property or a buyout from their current lease. "This event would trigger that notice to the tenant, the tenant being UT Medical, which has the option to purchase," **Ross** said. "It's a wait-and-see on how that turns out. We can't know until we get there." Both properties require \$10,000 in earnest money at the start of the feasibility period, but LUB would recoup that money if it backs out of the purchase before the feasibility period ends. "If we back out we lose \$100," Joe Ford, LUB and city attorney, said.

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

Several people in attendance voiced support for the project, none more than LUB employee Hank Ritchie. "I've been at Loudon Utilities for almost 23 years, and I spent 19 in the office that I'm in," Ritchie said. "... I'm proud of what you gentleman have done and especially you, Ty." Ritchie talked about improved safety for customer service employees and upgrading to a building compliant with the Americans with Disabilities Act. He also commented on the overall condition of the current offices. "I come in at 8 o'clock in the morning, and if I don't go outside I don't know if it's sunshine or snowing or anything," he said. "The only time I know it's raining is that I hear the water dripping from the roof into the bucket in the room next to me, and then my door started to leak. So I'll be happy as a bug in a rug to get out."

Moving forward with riverfront

Going hand-in-hand with the decision to purchase the property on Highway 72 is the development of the Hutch property downtown. LUB voted to enter into a professional service agreement with Partners and Associates Inc., to put together a development plan for the property. The agreement with Partners costs \$17,600 and includes coordinating "the activities of architects, engineers, general contractors and any other consultants necessary to complete the services for the planning projects." This would include planning for a potential relocation of Malibu Boats, as well as for other potential businesses, according to the agreement.

The city will be asked to reimburse additional expenses related to the project. "In a situation like this mostly it's going to be reproduction costs to prepare copies of things," Corey Shepherd, Partners representative, said. "We're typically talking about final reports, foam boards that might have images of how the site will be laid out, things like that. We don't anticipate travel costs, out of town consultants, things like that coming in to spend the night. ... We don't anticipate anything out of the ordinary." The anticipated schedule for the completion of services is eight weeks and would only exceed that timetable if negotiations with potential developers or businesses need to continue, Shepherd said. "If we were to, for example, get six weeks into it and be in conversations with a potential use on the site and that meant a deeper dive of sorts because we have a fish on the hook, if you will, then we might ask for additional time simply because we want to carry those conversations forward," he said.

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

The News-Herald (TN)

February 28, 2018

Loudon Approves Two Road Projects

Author: Jonathan Herrmann

Loudon City Council voted Feb. 20 during its monthly meeting to approve two resolutions related to road construction. The first resolution authorized Loudon Mayor Jim Greenway to execute contracts with the Tennessee Department of Transportation to fund resurfacing and sidewalk repairs to Highland Avenue. "Highland Avenue connects to a state route and is therefore eligible for state contribution through this resurfacing project," **Ty Ross**, city manager, said. "It includes milling, resurfacing, sidewalk improvements, striping and warning and safety signs on Highland Avenue from Carding Machine Road to State Route 2, which is also known as Mulberry Street."

The project will cost \$170,000, with \$34,000 paid for by the city of Loudon. The cost includes environmental assessment, engineering, design and construction. A completion date is set for 2022. Dennis Stewart motioned and Jeff Harris seconded, with the motion passing 5-0. "We appreciate Jack Qualls (Loudon Economic Development Agency executive director) for getting us in the hopper for this," **Ross** said. "If you don't get in the queue then you wait even longer." Council also voted unanimously to approve repair on a section of Smokey Drive. Discussion on the project had been ongoing since September.

When initially put out to bid, the project came in well over budget. Through negotiations with J.D. Anderson Contracting LLC, the project's sole bidder, Ellis Scruggs, Loudon Public Works director, was able to bring the cost of the project down by \$10,950 to \$41,200. "The original bid came in at \$52,150, which was quite a bit higher than we wanted to spend. We began to work with the contractor and the engineering firm and were able to get the grouted riprap off of the schedule as well as eliminate the survey stakeout cost and traffic control, and we're going to handle that ourselves," Scruggs said. The work on Smokey Drive will repair a section of the road that has eroded.

Stewart commended Scruggs for the savings at Smokey Drive as well as **Ross** for recent savings on the city's insurance plan. "It takes effort to make change and you're making a great effort," Stewart said.

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

The Greenville Sun (TN)

February 14, 2018

Loudon City Council Considers Improvements

Author: Jonathan Herrmann

Loudon City Council got a glimpse during a workshop Monday night of what the future could hold. A presentation from **Ty Ross**, city manager, and Travis Gray, codes enforcement officer, provided council with the possibility of purchasing vacant buildings for use as city facilities and shared assets. "A lot of the thinking behind this derived from when the original budget was put together for a new city hall — that budget from several years ago was \$5 million," **Ross** said. "When I moved to town, one of the things that upset me the most, and I get my blood up every morning driving to work, is the number of empty, dilapidated buildings in the community, especially along the major corridor here."

Ross detailed what he called the Tri-Star plan, named after the state flag, with the three stars for the flag being Loudon's downtown, west end and Highway 72 corridor. The city would acquire empty properties in each corridor to revitalize those properties rather than leaving them empty. "A community is really a large real estate development," **Ross** said. "A community is built around a collection of shared assets people in the town take pride in. The thought was to take our shared assets and strategically place them in places that would fill empty buildings or do away with dilapidated structures."

The downtown presentation included a potential mock-up of what could be done with the Hutch property purchased by Loudon Utilities Board in November at a cost of \$1 million. Included in the presentation were real estate and mixed commercial and residential buildings where the existing Hutch property stands, along with shared green space leading to a riverwalk that would run from the area of the Hutch property to Legion Park. There is currently no plan for that area, but **Ross** wanted to provide council with a view of what could be possible. Ideally, the city would devise a plan for the Hutch property and find private investors to put money and other resources behind development, Gray, who designed the mock-ups shown Monday night, said.

The second area, the west end, presents council with the possibility of purchasing the old co-op building that sits empty at 925 Mulberry St. The building could be used as a new office for Loudon Police Department, which **Ross** said was an idea rather than a requirement. "Loudon looks best when its institutions line up," **Ross** said. "When you drive down (Highway) 11 and you look at the middle school, the park and the high school and ball fields that surround it, that's a nice stretch. It's a nice stretch because they're all shared assets and they're all taken care of. ... This is just another shared asset in the row."

Jim Greenway, city mayor, did raise concerns over the co-op building and its condition. Johnny James, city councilman, echoed those concerns. "Being an older building it may have issues," **Ross** said. "There would be plenty of contingencies in transactions we may pursue. Lots of due diligence, much like the Hutch property. We'll take a good, hard look at it and decide what we're

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

going to do before we do it." The final acquisition would be along Highway 72 and would come in the form of two empty buildings — the former UT Medical office and the empty Capital Bank building that sits next to it, which would become the city and LUB's new campus. Councilmen Jeff Harris and Dennis Stewart supported the project, while Councilman Lynn Millsaps said he would need more time.

Paying for acquisitions and changes to the buildings could become obstacles, council worried. Greenway pointed to a desire to not raise property taxes. "We could go to the bond market for something like this," **Ross** said. "Of course there are different grants available, regional development loans. We could put together a package and find the most advantageous financing available if there is an appetite to pursue this project." "I think the whole community would support it," Greenway said. "They would just want to know what's it cost and how do we pay for it? It's a beautiful idea." **Ross** believes the city could come in "well under \$5 million" previously proposed for a new city hall structure in the proposed acquisitions.

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

Advocate and Democrat, The (Sweetwater, TN)

January 24, 2018

Shake up for downtown Loudon

Author/Byline: Jonathan Herrmann

Loudon City Council recently voted to authorize an application for the Tennessee Downtowns program, which officials hope will "keep momentum" in the downtown area as the Loudon Merchants and Property Owners Association assesses its future. Patti Wells, LMPOA director, recently resigned, leaving the organization in a transitional phase, Jeff Harris, city councilman, said. "We're just hoping that this will kind of bridge the gap between the restructure of the LMPOA, and they've started a Loudon merchants group that is made up of merchants, of business owners, and they're trying to get that off the ground," Harris said. The possible Loudon merchants group hopes to continue some of the programs implemented by LMPOA, including fundraisers like the Pigout, but with a focus on better using money raised to benefit merchants — something some felt was not the case, Harris said. **Ty Ross**, city manager, learned about the Tennessee Downtowns project through a representative of the state and felt the timing was right to look into the program because of the change within the LMPOA. "I found this to be a good stop-gap measure to keep momentum rolling in our downtown and business corridor of Highway 11 and 72," **Ross** said. "To keep our eye on the ball, to get us proper training and work toward a Main Street community." With acceptance into Tennessee Downtowns, cities get \$15,000 for use in a pilot program. A steering committee is implemented to decide what the program will be. The steering committee could fill the role of LMPOA should the organization fully disband. "I think every community needs a conduit for progress," **Ross** said. "When ideas come forward, and especially ideas for improvement, it needs a vehicle for implementation. Tennessee Downtowns, forming a steering committee, doing a pilot project puts all those pieces in place where it can grow and mature for years to come." Acceptance into the program would put the city on track to become be accepted into Tennessee Main Street. Main Street is a national program that serves as a tool for revitalizing downtown areas through design, economic restructuring, promotion and organization. There are 34 cities in the state accredited as Tennessee Main Street communities. Hopes are that being part of the program can help boost traffic in downtown and establish more local businesses. There are multiple empty storefronts in downtown Loudon. "We're hoping we can boost downtown," Harris said. "We just need to get the right businesses down there. ... I know you're always going to have turnover and things, but you just have to get the right combination." Jerry Ragle, who operates the Whistle Stop Boutique and Lyric Theatre downtown, said he was encouraged by the city's decision to pursue the Main Street designation, adding that he hopes merchants will have a strong voice on a steering committee. "As many merchants as we get involved in downtown the better off it would be," he said. Ragle recently attended a city council workshop where the Tennessee Downtowns application was discussed, along with work on the Loudon riverfront, which he called "vital" to downtown. "I was told when we came into this town, 'You'll never be accepted, you're an outsider'," Ragle said. "I have found it exactly the opposite." Jim Greenway, Loudon mayor, encouraged business owners to be actively involved in what goes on downtown by attending city council meetings.

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

The News-Herald (TN)

December 6, 2017

Loudon Enjoys Downtown Rebrand

Author: Jonathan Herrmann

Drivers heading down U.S. Highway 11 into downtown Loudon will be greeted by the words "Historic Loudon Tennessee." The three words now grace the face of the water tower on the old Hutch property, which was recently acquired by Loudon Utilities Board in a \$1 million sale that closed Nov. 1. The new paint job also includes the city's founding date of 1817. "I've received a lot of positive feedback," **Ty Ross**, Loudon city and utility manager, said. "I think it's an improvement of what was there prior. It does a better job now of announcing when you come across the bridge or when you crest the hill at Mulberry (Street) where you are and what a special place it is."

Rebranding the water tower was at the top of the list for LUB and the city of Loudon as soon as acquisition became a reality. During a city council meeting in September, Jeff Harris, city councilman, said the tower could be a "torch" for the city. "I think it's kind of a historic thing that a lot of people in the community wanted to have it refurbished to some degree," Mike Lamber, assistant manager and finance officer for LUB, said. "I think they were able to do that and able to pull together some folks to make it happen." Community feedback has been overwhelmingly positive, according to city and LUB officials. "Tickled to death, tickled to death, and I think everybody is," Johnny James, LUB board member and city councilman, said. "I haven't heard a negative comment from anybody in town. "... It's hard to put a dollars and cents cost on it, but as far as Loudon is concerned, and the people of Loudon, you can't put a price tag on it," James added. "It's something that should have been done a long time ago. We talked about it five to six years ago, and it went nowhere."

Design plans were put together in 2012 and 2013, but with the tower on private property, there was no way for the city to proceed. With the Nov. 1 purchase, the rebranding of the tower came together quickly. "We simply pulled that plan off the shelf, dusted it off and executed it," **Ross** aid. "We had nothing holding us back because now we owned the property." Attention now turns toward figuring out what comes next for the Hutch property and the rest of the Loudon riverfront. "We're trying to get proposals from developers and working with (Tennessee Valley Authority) as well about the waterfront and everything else," James said. "It's just hard to say. It's taking shape and actually moving a little quicker than anticipated. We've had some people come down that's really interested and others that are interested in office space. We're not sure we want to go that way. We're trying to do what's best for the city of Loudon."

City and LUB officials will meet with staff from the University of Tennessee later this week in hopes of crafting "a more comprehensive riverfront plan and strategy." A meeting with TVA is also set to discuss dredging the inlet near downtown Loudon to create "more of a city harbor," **Ross** said. "It's a combination of both private and public efforts," **Ross** said of the riverfront area. "We will market the property toward private developers with the goal of perhaps securing an

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

anchor or two for the property. On the public side, we'll pursue grants to provide public enchantments to the property such as riverwalks or other shared spaces." While the city contemplates its next step, officials hope the water tower will serve as a reminder that change is coming. "We see the water tower as kind the tip of the spear in terms of planning and redevelopment of not just the Hutch site but the entire riverfront," **Ross** said. "It's the most visible and is the logical place to start."

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

The News-Herald (TN)

October 11, 2017

Loudon Talks Downtown

Author: Jonathan Herrmann

Loudon City Manager **Ty Ross** brought city council up to speed Monday during a regularly scheduled workshop on some possibilities for changes to the use of funding for the downtown square rejuvenation. **Ross** met with the courthouse square fund committee last week regarding the possibility of reallocating some of the courthouse square dollars to be used for things like sidewalks, lampposts, park benches and other shared assets for the overall area. "That idea or concept was explored with the committee and they were receptive to it," **Ross** said. There is currently a balance of about \$125,000 remaining in the fund marked for signs and awnings — \$11,597 — and for commercial building exteriors — \$114,064 — from the last phase of the revitalization project. "Feedback of the committee was, let's leave those dollars as is and those funds be drawn down on a first-come, first serve basis," **Ross** said. But the remaining dollars in the courthouse square fund from this point forward through 2023, until such time as the general assembly chooses not to continue this program, that those dollars be reallocated toward shared assets. For example, the water tower."

City Councilman Johnny James suggested allocating some of the funds to install sprinkler systems in the upstairs areas of some of the downtown businesses so they could be used as apartments. "I have questions about putting that money into private business, property owner business, when we can do things more for the city like the sidewalks and streetlights and benches, development down along the river, the water tank," Jim Greenway, Loudon mayor, said. "... If I owned a business and I wanted to do something like that, I would have to come up with the money to do it if it weren't downtown in that area."

Councilman Lynn Millsaps suggested that any business owner who wants to request funds for such a purpose should present their proposal to the committee and let the committee decide whether it's something they would like to approve. Council also briefly discussed the future of the Loudon Merchants and Property Owners Association, which **Ross** had discussed with the courthouse square committee. "When it came together originally ... it was probably at the right time and for a reason," **Ross** said. "There was a needed focus for downtown and there was a needed energy. That group filled that void. We talked about the necessity for an LMPOA going forward. There is some reorganization within that organization. I encouraged them that the city of Loudon is focused on downtown and they want downtown and the entire city to thrive. We're working on their behalf and as they go forward they may want to consider winding down if they can put their trust in us." Reorganization of the LMPOA includes the resignation of executive director Patti Wells, who will step down at the end of December, Jeff Harris, councilman, said. "We're using this as a time to reevaluate all that, the direction," Harris said. "They've got all the properties leased that they had. The RDA payment and all that is being paid."

Internet – Newspaper Archives Searches

James Tyson Ross

(Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **Tyson Ross** is listed below.]

The News-Herald (TN)

May 17, 2017

Loudon Ready to Hire Manager

Author: Jonathan Herrmann

Manager offer extended

Both the LUB and city voted in favor of offering the position of city and utility manager to **Ty Ross**, who would come to Loudon from Dalton, Ga. **Ross** worked as city administrator in Dalton for nearly seven years before resigning that position in September. He has a law degree from Georgia State University and a Master of Business Administration from Kennesaw State University.

"We interviewed five different prospects that were all excellent," Greenway, who served on the search committee for the position, said. "I mean we were fortunate. He just floated to the top, more impressive, more dynamic. It seems like he can create a better vision for the future than what the others indicated. That's simply my opinion."

While **Ross** has not worked for a utilities board, Greenway said he had experience working in conjunction with utilities. "He's well-rounded, I'll put it like that," Greenway said.

Internet – Newspaper Archives Searches

James Tyson Ross

(Articles are in reverse chronological order)

Daily Citizen-News (GA)

December 4, 2016

Ross Joins McCurry Law Firm

Author: The McCurry Law Firm

The McCurry Law Firm LLC proudly announces that **J. Tyson Ross** has joined the firm as an associate. **Ross** is a native of Dalton and has been licensed to practice law in Georgia since 2002. **Ross** graduated from the College of Law at Georgia State University where he received the litigation award in his class. Prior to law school, **Ross** earned his undergraduate degree in history from the University of Georgia. While at UGA, he lettered in football and served as student assistant to Coach Vince Dooley at the UGA Athletic Association. After graduating from UGA, **Ross** taught civics and coached football at Northwest Whitfield High School. After returning to school and earning his law degree, **Ross** practiced law with both Mitchell & Mitchell P.C. and Minor, Bell and Neal, P.C.

Always active in the community, **Ross** is a graduate of Leadership Dalton-Whitfield and has worked diligently throughout his career to advance local institutions. After earning his master of business administration degree at night he then taught business law at Dalton State College and helped the School of Business achieve international accreditation. Most recently, he served the city of Dalton as city administrator where he facilitated the reduction of taxes, the construction of the Mack Gaston Community Center, the redevelopment of Mt. Rachel and the Crown Mill Village, as well as the opening of the Haig Mill Reservoir to the public. He is a member of the Rotary Club of Dalton, and worships with his family (wife Jennifer, sons James and George) at St Mark's Episcopal Church.

The McCurry Law Firm was established in 2004 by Robert G. McCurry. McCurry has 25 years of experience in representing clients of Northwest Georgia. The McCurry Law Firm specializes in complex corporate matters and litigation, contested probate, guardianships and trusts, family law, personal injury law, general litigation and advising business clients of the community.

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

The Tifton Gazette (GA)

October 4, 2016

City Council in the Dark about Multiple Contracts for Park

Author: Charles Oliver

Dalton City Council members did not know there were two different contracts for them to purchase a piece of property from Crawford Street Properties when they tabled a resolution to approve the deal and other contracts in August, according to Mayor Dennis Mock. Nor did they realize that the second contract contained a financial penalty of \$374,706 for the city if they failed to close the deal. "We found out in one of our executive sessions after we tabled the deal," Mock said. "I think everyone's jaw just dropped when we did find out." Executive sessions are closed to the public and the media.

The property was one of several downtown properties city officials had negotiated to purchase for a possible central park. Documents provided by the city show there were two different contracts to purchase the property for \$1.475 million. Both were apparently signed by then-city administrator **Ty Ross**, who reached a separation agreement with the city last month, and Larry Winter, president of Crawford Street Properties, on July 21. One of the contracts, the one Mock said the council members did not know about, contained a "liquidated damages" clause, which said that if the city did not purchase the property it would pay the seller "the remaining rent due to the seller under the leases for the existing terms of the lease totaling \$374,706."

The second contract, which was included with several other contracts for the purchase of downtown property in the agenda packet for the council's Aug. 15 meeting, did not include that clause. Mock said **Ross** requested the changes to the contract. He said council members "never really" got an answer to why the changes were made or why two contracts were signed on the same day. Council members Gary Crews, Tyree Goodlett, Tate O'Gwin and Denise Wood did not immediately return telephone messages on Friday. "I don't know. I can't speak to that," **Ross** said Friday when asked why two different contracts were apparently signed by him and Winter on the same day. Asked if it was his signature on both contracts, **Ross** said, "I don't work for the city anymore." Winter said he "was sure" he signed the contracts. "But I was not the negotiator," he said. "It was (partner) Kevin Harris. He handled all of the negotiations."

Winter compared it to a scene in the movie "Air Force One" where an assistant brings some documents to the president of the United States to sign, and the president doesn't read them before signing. "Kevin would have brought me something to sign and I said 'fine' and signed it," he said. Harris did not immediately return a telephone message Friday afternoon. In response to an open records request from The Daily Citizen, the city turned over all emails between **Ross** and council members and among council members regarding the park and the purchase of property for the park.

The first email was sent by **Ross** on July 11 and read simply "First contract of many. Attached is a spreadsheet to help keep track." There are no more emails until Aug. 16, the day after the

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

council voted to table all of the contracts. Goodlett emailed a list of questions to **Ross**, other council members and other city officials regarding the park.

Among them:

- "What is the rush to acquire these properties? I have never seen a project that requires such confidentiality and quick decisions that will affect so many people?"
- "Were all the proper channels followed and in the original process of executing the contracts on the properties?"
- "Is the city liable for a breach of contract if the properties are not acquired even though some of the contracts are signed and dated?"

An answer to Goodlett's questions was sent to council members on Aug. 18. The copy of the email provided to The Daily Citizen does not include the sender's information, but City Attorney Jim Bisson confirmed it was sent by **Ross**. In response to the question about the "rush to acquire" the properties, he wrote: "It has been our custom and the direction from elected officials to enter into voluntary sales rather than exercise condemnations for park land. The mayor and I worked to assemble the properties quickly to facilitate a project. Updates were provided during executive sessions and finance committee meetings on the progress. You will recall the red, yellow and green sheets showing the progress with the final update informing you of agreements with all owners (except for Greely Joiner) at the 7/30/16 planning retreat."

Ross goes on to note that "We openly discussed property acquisition of the downtown block" at five different meetings -- including executive sessions closed to the public and the media, finance committee meetings and a planning retreat -- in July and August. In response to the question about whether the proper channels were followed, he wrote, "Yes. The mayor was in attendance at every meeting with property owners except for the Watkins brothers who live out of state. Tom Minor prepared all the contracts." And in response to the question about liability for not purchasing any property, he wrote: "All the contracts have contingencies except the Winter & Harris (Pruden Building) property. The owners of the Winter & Harris (Pruden Building) property refused to wait until the end of the year to close which moved our timeline forward. You gave the mayor the go ahead to purchase that property by the end of August when the mayor personally visited you on the afternoon of July 20th."

**Internet – Newspaper Archives Searches
James Tyson Ross***(Articles are in reverse chronological order)*

The Tifton Gazette (GA)
September 20, 2016

City Council Agrees to Payout City Administrator

Author: Charles Oliver

Dalton City Council members voted 4-0 Monday night to approve a separation agreement with former city administrator **Ty Ross** that will pay him some \$36,000 but required him to waive "all claims of any kind" against "the city ..." But they were still largely mum on why he resigned by mutual agreement last week. **Ross** has not returned telephone messages left for him since Wednesday. Mayor Dennis Mock usually only votes in the event of a tie. "I think he's just moving on, and I wish him well," said council member Denise Wood when asked why **Ross** resigned. Council members Gary Crews, Tyree Goodlett and Tate O'Gwin and Mock have declined to comment on the reasons for **Ross'** resignation, calling it a personnel matter. They have also declined to comment when asked if the resignation had anything to do with the handling of a contract seeking to purchase property from Crawford Street Properties for a proposed downtown park. Council members voted two weeks ago to pay Crawford Street Properties \$85,000 after the city failed to purchase the property by an agreed-upon date.

The separation agreement says that **Ross'** "termination date" is Sept. 30, though his last day of work was Sept. 13. The agreement says that **Ross** will be paid his normal salary (\$95,000 a year) through the termination date. In addition, he will receive \$6,805.29, minus any legally required deductions, for unused vacation time. Upon termination, he will receive a one-time payment of \$26,000, minus any legally required deductions. "We conferred with Jim Bisson, our city attorney, and Greg Batts, our human resources director, and discussed this among ourselves and that seemed appropriate for the time (**Ross**) has put in with the city," said Wood of the \$26,000 payment. **Ross** became city administrator in October 2009 following a 13-month search by the City Council.

Crews, Goodlett and Mock declined to comment on the \$26,000 payment, calling it a personnel issue. The agreement says that in return for **Ross** accepting it he waives "all claims of any kind" against "the city, its elected officials, trustees, officers, employees, former employees, attorneys, agents." Council members said Monday that Batts had emailed them earlier in the day asking questions about how they would like to proceed with a search for a new administrator. "We haven't set up a timetable," said O'Gwin. "I assume that we will have that discussion very soon."

Council members said that during the search the city's department heads will be stepping up and taking on various parts of **Ross'** duties. "I will be taking a more hands-on role as well," said Mock. Council members said they do not know how long the search for a new administrator will take. "It will take as long as it takes," said Mock. "We obviously don't want to delay anything, but we want to take our time and be thorough."

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

Valdosta Daily Times (GA)

September 15, 2016

Dalton City Administrator Resigns

Author: Charles Oliver

After almost seven years as city of Dalton administrator, **Ty Ross** resigned on Wednesday, effective immediately. **Ross** did not immediately return a telephone message on Wednesday. Mayor Dennis Mock confirmed **Ross**' resignation. Mock declined to comment on the reasons for the resignation, but said the council members will begin a search for a successor as quickly as possible. Asked if the resignation had anything to do with the handling of the contract to purchase property from Crawford Street Properties for a proposed downtown park, Mock declined to answer.

Mock said council members had not had a chance to discuss whether to appoint an interim administrator or who will handle **Ross**' duties until a new administrator is selected. **Ross** played a key role in the city's "green" initiatives during the last several years, such as the planned park at the Haig Mill reservoir and the biking and hiking trail on Mount Rachel. "He was a real asset to the city," said Mock. "He was a workhorse, and he had a wealth of knowledge."

Council member Tate O'Gwin said **Ross** "saw a lot of potential in the city." "I wish him the best in all his future endeavors," he said. A former attorney and professor at Dalton State College, **Ross** became city administrator in October 2009 following a 13-month search by the City Council. **Ross** is a native of Whitfield County. He grew up in the Beaverdale community and the Cohutta area. He graduated from Northwest Whitfield High School and received a bachelor's degree in history from the University of Georgia, a law degree from Georgia State University and a master's of business administration from Kennesaw State University.

Ross returned to Dalton after college where he practiced business law for six years with Mitchell & Mitchell and Minor, Bell & Neal. Later, he served as assistant dean of Dalton State College's business school. **Ross** was named a finalist for the post of city manager of Statesboro in June of this year but removed himself from contention for that post shortly afterward. He was a finalist in 2015 for city manager of Cookeville, Tenn.

Internet – Newspaper Archives Searches

James Tyson Ross

(Articles are in reverse chronological order)

Daily Citizen, The (Dalton, GA)

March 21, 2016

Board moves to acquire property so road project can move forward

Author/Byline: Charles Oliver

Unable to find any owners of a small piece of property off Fields Avenue, members of the Dalton City Council voted 4-0 to condemn the property Monday night so that the Veterans Drive extension project can go forward. Mayor Dennis Mock typically votes only in the event of a tie.

Council members agreed to petition Superior Court to condemn 3,243 square feet of land and to provide a temporary construction easement on another 2,607 square feet of land.

“People have died without heirs, the estate isn’t probated and administered, and it’s hard to track down the heirs to establish who owns some of these little slivers of property,” said City Administrator **Ty Ross**. “Sometimes it’s impossible to find anyone to negotiate a purchase. In those cases, the state of Georgia allows a public condemnation to acquire that land.”

The \$5 million extension project, which will extend Veterans Drive to Morris Street, is one of the last projects to be funded from the 2007 Special Purpose Local Option Sales Tax (SPLOST).

Council members also voted 4-0 to amend the city’s building code. Officials said the amendment made no major changes to the code itself but updated the wording to bring it in line with the state building code.

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

Daily Citizen, The (Dalton, GA)

February 26, 2016

Little Debbie maker helps fund Dalton trail

Author/Byline: Charles Oliver

Plans to build a hiking and walking trail that will connect Dalton's Crown Mill Village area to Haig Mill Lake got a big boost Thursday. McKee Foods, the maker of Little Debbie snacks, presented a check for \$20,000 to city officials for the project. The check was the first grant presented by the company's Outdoor Happiness program, which will fund one project in each of the nation's 50 states to promote outdoor activities. "Our goal is to encourage physical activity and to help communities encourage people to get out and enjoy the outdoors," said Connie Vaughan, manager of government relations at McKee.

Vaughan, Dalton City Administrator **Ty Ross** and Greater Dalton Chamber of Commerce President Rob Bradham had gotten to know each other through their mutual involvement in Thrive 2055, which brings together government officials and business leaders from 16 counties in and around Chattanooga to better plan for the region's future. "Connie contacted me and asked if there might be a project in Dalton that would fit (Outdoor Happiness), so I contacted **Ty**," Bradham said.

The Mill Creek River Walk, as city officials are calling it, would start near the Chattanooga Avenue pocket park and run along the side of Mill Creek north about a mile toward Haig Mill Lake. The plan is that it will eventually link to hiking and bicycling trails that will circle Haig Mill Lake that are going to be built with money from the Special Purpose Local Option Sales Tax (SPLOST) voters approved last year.

The Dalton Civitan Club had previously pledged \$20,000 for the project. The city has also applied for a \$100,000 grant from the Georgia Recreational Trails program. **Ross** says the amount of funding the city receives will determine the type of trail the city builds.

Mayor Dennis Mock said the trail will be a "game changer" for the city. "I think that this, along with the Haig Mill project and all of the other things we are doing in terms of outdoor activities, will make this a greener city, more attractive to visitors and to young professionals," he said. Mock said he believes having a company such as McKee give the project a vote of confidence should make it easier for the city to get other grants for the Mill Creek River Walk.

Vaughan said McKee officials would like to see that. "It is certainly our hope that we can encourage others to donate to the city and help make this a reality," she said.

The Daily Citizen (GA)

December 5, 2015

Dalton to Hold First Hearing on 2016 Budget on Monday

Author: Charles Oliver

The city of Dalton's proposed 2016 budget calls for holding the property tax rate steady at 2.511 mills. But city officials say that doesn't necessarily mean the City Council's streak of cutting taxes eight years in a row will end next year. "Every year, we make our budget based on the previous year's tax rate," said City Finance Director Cindy Jackson. "Once we close out the previous year, and as we get closer to the time to set the rate (in the fall), the council begins to discuss what the rate will actually be." The City Council will hold its first public hearing on the 2016 budget proposal on Monday at 4:30 p.m. in the council chambers at City Hall. The budget calls for some \$33.1 million in spending, up from \$32.1 million in spending this year. The recreation department's budget would rise to \$3.4 million under the proposal, from \$3.2 million this year. Officials said that is driven by the department's plan to host several softball and baseball tournaments in house next year to better utilize the city's fields. "That additional spending would be offset to some degree by additional fees and concessions," Jackson said.

Infrastructure spending would fall to \$282,000 under the proposal from \$998,000 this year. City Administrator **Ty Ross** says that is because street paving will be paid for through money collected from the Special Purpose Local Option Sales Tax (SPLOST) voters approved in March and not from the city's general budget. The four-year, 1 percent tax is expected to collect \$63.6 million, and the city will get \$10 million of that for street repaving, bridge repair and stormwater control. "In our first budget meeting, we had anticipated a 6 percent health insurance increase, but that actually stayed the same, so that was some good news for us," Jackson said.

The budget anticipates some \$31.6 million in total revenue for 2016. The largest single source of revenue for the city is the \$10 million transfer payment from Dalton Utilities, up from \$9.6 million this year. The city receives 5 percent of the utility's revenue. The second largest source of revenue is property tax collections, which are expected to remain largely unchanged next year at some \$7.9 million. "We are fortunate that we have more diverse sources of revenues than most other cities," said **Ross**. "Most cities don't have an electric utility."

The city would have a deficit of about \$1.5 million, which officials say they plan to cover by drawing down the fund balance in order to fund various capital items that won't be covered by the SPLOST. Jackson said she anticipates the city will end 2015 with a fund balance of some \$20 million and 2016 with a fund balance of some \$18.5 million, still well above the 90-day reserve that most governments try to maintain to cover any cash-flow issues. But officials say they know the city has unfunded liabilities in its pension fund and capital needs that might require them to have to draw down that fund balance at some point. "It isn't like that money is just sitting there. It is encumbered in some way," said Mayor Dennis Mock.

WRCBtv (GA)
November 13, 2014

Future of Dalton Depot Restaurant Up in the Air

Author: Unknown

The future of a well-known Dalton landmark is up in the air. The downtown Dalton Depot has been closed after a city inspection revealed safety issues. The city owns the historical building turned restaurant, but the owner has been running the business for decades. The owner of the Dalton Depot restaurant was too upset to talk with us on camera about having to be shut down. The city tells us there are safety issues that can not be ignored. "I think it says about repairs or something?"

Jackie Deaton is just one of many people we saw stopping by the Dalton Depot Friday to grab a bite to eat. "They have good chicken sandwiches here, so 'let's go by here and get one of them real quick.' It sounds like they're closed because of the city of Dalton for some reason," said Deaton. A sign posted on the door reads "Closed for repairs by City of Dalton." "It's a very old structure. And the maintenance to the building over the years is important. And we've done some, uncovered some safety issues that had to be addressed sooner rather than later," said City Administrator **Ty Ross**.

Ross says a contractor estimates the repairs would cost hundreds of thousands of dollars. "The flooring and the structural integrity of the building is in jeopardy," said **Ross**. When asked how the repairs have been on the city's radar he answered, "Recently come about due to our own investigations." Restaurant owner T.J. Kaikobad held back tears as he spoke to Channel 3 off camera. He says the business has been in his family for the past 25 years and it was tough telling his employees and customers they were being forced to close. "The city owns the building and it's leased to the tenant. And there's rights and obligations under the terms of the lease," said **Ross**.

The building itself dates back to 1836 and is older than the city of Dalton. It survived Sherman's march to Atlanta. According to the restaurant's website, the city purchased the building in 1978 and underwent a \$1 million renovation in 1990. "What we're trying to get down to is what is the best way to go about accomplishing these repairs, utilizing tax dollars. So we want to be good stewards of the tax payer's dollars. So we're doing this in a very concerted and thoughtful manner," said **Ross**. It is not clear if or when the restaurant will open back up.

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

Daily Citizen, The (Dalton, GA)

August 19, 2015

City email address found among cheating website information

Author/Byline: Martin Martinez

A city of Dalton email address was found among hacked information from the Ashley Madison website. AshleyMadison.com is a dating website for, among other things, married people who are looking to cheat on their spouses. The front page of its website states, “Have an affair today on Ashley Madison.” In July, hackers claimed they had taken more than 10 gigabytes of information off the website including account information, addresses and emails. A city of Dalton email address is listed in a searchable database that contains the leaked Ashley Madison information. Bruce Frazier, public relations specialist with the Dalton Police Department, confirmed on Wednesday that that email address belongs to someone in the police department.

In an email, Chief of Police Jason Parker said the department was just learning about the release of the information on the Internet. “I think the responsible thing to do first is to find out whether the information is accurate,” said Parker. “The Dalton Police Department, and city, have policies which regulate how employees are to use both Internet and email resources. We will be looking into this immediately, and when we have the facts, we will take whatever action is appropriate.”

Mayor Dennis Mock said he has talked to Parker and members of the Public Safety Commission about the matter. “Like everything else on the Internet, it’s hard to believe everything you read,” Mock said. He said an investigation will be conducted to find out more about the email address that was found. “Until then, we don’t want to say a lot about it,” he said. “We don’t want to hang anybody without knowing the facts. If it’s true, it’s very unfortunate and we’ll take appropriate action.”

Mock said he talked to the city’s IT (information technology) department to see if the address could be tracked to the person who used it. “They said there is such a thing as spoofing, or using someone’s email address to do things like this,” said Mock. “Anybody can use that email address and not follow up on it. They could have applied for an account and do nothing else with that account.” In order to track down the person who used the email address, Mock said the IT department would have to do a lot of work to see when the website was first accessed with that email.

Mock said the city has a policy against using city computers or city email addresses to access any kind of social media or personal accounts. “Computers at work are not to be used for personal things,” said Mock. “If this was a city employee, we’d have to deal with them. I suspect they would be terminated and they would have to answer to their spouse, whether they are male or female.”

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

City Councilman Tate O’Gwin said he believes it is a shame people will sign up for websites like Ashley Madison, and he is disappointed a city email address was found in the website leak. He said the matter has to be investigated further. “I think that we need to look into it before we make any kind of decision,” said O’Gwin. “I want to talk to legal and HR (Human Resources) and take into account their opinion. I want to know more before I have a comment on it.”

Councilman Gary Crews said very little action can be taken until a full investigation is done. “Did someone actually do something wrong or was someone hacked?” asked Crews. “Who knows? I’ve heard some speculation on Facebook but I think it’s too early to tell.” Crews said he would anticipate some action but not until city policy and the appropriate process is followed. “I think it’s unfortunate that this is out there,” said Crews. “Someone might have made a mistake. Once we gather all the information, we’ll be able to know if this person was out of bounds or if they were the victim of a leak.”

Ty Ross, city administrator, said the city has “net nannies” built into its network that prevent those sort of sites from being accessed. “This is something that is concerning and we’re on top of it and we’ll do what needs to be done,” he said.

Mock said city employees are asked to be very careful on any site they access, not just while on city computers. “You are an employee of the city and we expect you to have respect for the city and your position,” he said. “I think this is another example and warning for anybody that you can’t get by with anything and you shouldn’t do things like this.”

Statement from Dalton Mayor Dennis Mock

“This is certainly not a list the city of Dalton wants to be associated with. I don’t condone such activity and I would certainly rather not have to spend time addressing matters like this because, frankly, we have been on worse lists in recent years, namely, high unemployment, lack of economic diversity and alleged under-education. Those type lists are more deserving of our time and attention. Still, I immediately asked our IT department to investigate the matter and after a five-year look back they did not find our email server connected to that site. Our IT department also pointed out to me that this could very well have been an email ‘spoofing’ which happens all the time and especially to email addresses that are openly displayed on the web. That said, we will certainly review our Internet/social media policies for sufficiency in light of this story and make any necessary changes.”

**Internet – Newspaper Archives Searches
James Tyson Ross**

(Articles are in reverse chronological order)

Daily Citizen, The (Dalton, GA)
April 20, 2015

City Council paves way for new business

Author/Byline: Jeff Harrison

The Dalton City Council on Monday opened the door for small, local brewers and makers of distilled spirits to do business in Dalton. Members voted 4-0 to approve an ordinance that adds microdistilleries and microbreweries to a list of establishment types that may be permitted to sell or manufacture alcohol inside the city limits. Mayor Dennis Mock typically votes only to break ties.

The ordinance creates an annual license fee of \$750 for microdistilleries (which produce less than 50,000 gallons of distilled sprits annually) and microbreweries (which produce less than 5,000 barrels of malt beverage annually). “We need business, we need new business and we need business downtown,” said Councilman George Sadosuk. “This should only help our downtown.”

The \$750 license fee was a product of council discussion, according to City Administrator **Ty Ross**. Fees range from \$250 to several thousands of dollars in other cities throughout the state, he said. “Council felt like this number wasn’t too cost prohibitive for those looking to start a business, and it was fair because a microdistillery or microbrewery can’t significantly undercut a regular retailer,” he said.

According to the city’s alcohol code, manufacturers that produce more than 50,000 gallons of distilled spirits annually, or more than 5,000 barrels of malt beverage, are required to pay \$5,000 for a permit. **Ross** said council members have agreed to reexamine the fee after one year, having seen how things develop.

Monday’s vote was good news for Chuck Butler, who has plans of opening a microdistillery in a 5,000-square-foot facility at 109 E. Morris St. The Chatsworth native said he has been developing the business during the last couple of years. His Dalton Distillery would be the first of its kind locally, he said. “We’re in negotiations to produce a moonshine product and distilled vodka,” Butler said. “I’ve been told by the state that the business could be approved by the middle of May, and hopefully we’d start producing soon thereafter.”

Currently in Georgia, microbreweries and microdistilleries cannot sell their product directly to customers, only to distributors. Butler said he hopes to sell to local distributors, and would like, eventually, to host tastings, tours, weddings and other parties at the distillery.

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

Daily Citizen, The (Dalton, GA)

March 29, 2015

Residents asked for input on highway proposal

Author/Byline: Charles Oliver

Imagine being able to avoid Chattanooga traffic and congestion when traveling north. Think about a road directly linking Dalton to Trenton and to Fort Payne in Alabama and Dayton in Tennessee. Officials with Thrive 2055 — which brings together government officials, business leaders and officials with nonprofit agencies in Georgia, Tennessee and Alabama — don't just want you to think about a new Chattanooga perimeter highway, they want your input on the idea as well. "That is one of the scenarios we have developed, and we are looking for input from the public on," said Thrive 2055 Project Manager Bridgett Massengill.

Massengill says the group will be holding public meetings in coming months, but in the meantime members of the public can read more about the perimeter, as well as ideas for economic development and education, online at regionalcompass.com. They can also find out more about Thrive 2055 at thrive2055.com. They can give their input on that site by clicking on "Get Involved."

Massengill stresses that no route has been laid out for the perimeter highway and no sources of funding have been identified. It remains just a concept. "We don't have the power to do that," she said. "If this is a concept the residents of this area support, it would be up to the departments of transportation in both states as well as the various metropolitan planning organizations to develop those details."

Dalton City Administrator **Ty Ross** has been very involved in the Thrive 2055 planning process, and he says he hopes that people in Dalton and Whitfield County take the time to study the perimeter scenario and give their feedback. "This is still very much in the concept and idea stage, but it could have a huge impact on us. It could be something that could affect this community as much as the Dixie Highway or I-75 did," he said. "This region certainly has traffic issues that will be addressed in the future. Thrive 2055 was organized to help us start thinking about those issues now. But I don't think we are as necessarily as engaged in this as the people in Hamilton County (Tenn., Chattanooga), and that's due largely to us not being in as close proximity. But the website gives us a chance to participate and make our views known."

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

The Daily Citizen (GA)

August 17, 2014

Dalton Awaits Final Approval of Greenway Plans

Author: Charles Oliver

Three years after receiving a \$500,000 grant from the Georgia Department of Transportation (GDOT) to create a “greenway,” Dalton officials may soon put the project out for bids. Maybe. “We have submitted everything we are supposed to submit (to GDOT), and we are just waiting for a notice to proceed,” said City Administrator **Ty Ross**. “We expect to get that in the next six to eight weeks.” Getting to this point has meant filing a number of studies and plans with the state. “That is one of the downsides of working with state or federal dollars. They do require a great deal of documentation,” **Ross** said. “As these things go, I don’t think it took very long. In fact, it probably moved pretty quickly. Look at the Rocky Face (interstate exit) interchange (reconstruction). That took 17 years after it was first planned.” “The greenway will extend from Chattanooga Avenue down an abandoned railroad spur to Rachel Street,” said Allen Peterfreund, principal at Dalton’s American Consulting Professionals, who is designing the greenway. “It will be a 10-foot asphalt walking (and bicycling) path. And there will be lights and landscaping,” he added.

The greenway will link the trailhead to the Mount Rachel hiking and bicycling trails on Rachel Street and a pocket park on Chattanooga Avenue. “The city has already done some work on Rachel Street putting a sidewalk in and a bike lane,” Peterfreund said. The railroad spur continues onto Hamilton Street, and **Ross** said the city might cut away the brush and clear the rest of that area. “It wouldn’t be a full greenway, but it would connect it,” he said. Dalton Parks and Recreation Department Director Steve Card says the greenway is integral to the city’s plans to improve the quality of life for residents. “To have a hiking trail like this in the middle of a city this size? There’s nothing like this anywhere else in the state,” said Card, who is past president of the Georgia Recreation and Park Association.

Five years ago, city officials unveiled a plan to link the city with a series of walking and biking trails, with the greenway being the first. While this project is still waiting for final approval, city officials are starting to think about what the next step in that plan will be. “It will really depend on funding,” said **Ross**. “It will also depend on this upcoming mayoral race and what sort of mandate the winner receives in that election and what happens in future council elections.”

Internet – Newspaper Archives Searches

James Tyson Ross

(Articles are in reverse chronological order)

Daily Citizen, The (Dalton, GA)

June 27, 2014

Grant could help homeowners with repairs

Author/Byline: Charles Oliver;

Low-income homeowners in Dalton may get some help with needed home repairs. The City Council voted 3-0 this week to approve an agreement with the Georgia Housing and Finance Authority that will make the city eligible for \$304,980 in Community Home Investment Program (CHIP) funds. These funds can be used by low-income homeowners whose homes no longer meet building code standards to get them back into code compliance.

“The typical person who qualifies is, say, an elderly person whose home really needs the roof to be replaced. This money can be used to replace that roof,” said City Administrator **Ty Ross**. **Ross** said the city does not have to provide any matching funds. “We really are just facilitating the grant,” he said.

The exact amount of money the city will receive will depend on how many qualified homeowners apply for the money and how much it will cost to repair their homes.

The Daily Citizen (GA)

June 11, 2014

Repairs at Emery Center Mandatory in Order to Meet Compliance, Remain Open

Author: Misty Watson

If the Emery Center is to remain open at its current location, the sprinkler system and fire alarm must be brought into compliance with state codes by Aug. 1, 2015, center and city of Dalton officials recently agreed. The heating, ventilation and air conditioning (HVAC) units must also be replaced and put on a structurally sound roof by that date, according to the agreement. Only the flat part of the center's roof will have to be repaired, not the portion with shingles. "The other things, outside and all that, we can do later," said Curtis Rivers, the center's director. "We'll run some estimates and see what people will charge to do those things and go from there."

The center, a nonprofit multicultural heritage center, is housed in the Emery Street School building that opened in 1924. The school served as the only black school in the community until desegregation. The building is owned by the city, and a 20-year lease agreement between the city and the center states that repairs must be made by the center. Though officials originally thought the repairs would cost approximately \$80,000, a newer estimate from an architect quoted \$455,000.

Ideas other than repairs have been discussed, including possibly moving the Emery Center's memorabilia and displays to Dalton High School, but no one associated with the center wants to see that happen. They remain focused on the effort to save the former school building. The way to do that, Rivers says, is to approach the much-needed repairs in stages. The first step is addressing concerns listed as the top three priorities by the county building inspector's office and the city's fire marshal — the sprinklers, the fire alarm system and HVAC/roof repairs. "Everyone agreed to these terms," said **Ty Ross**, city of Dalton administrator. "They (Emery Center officials) didn't want to feel rushed or hurried and wanted to use it in their ongoing fundraising campaign. We provided them with a very reasonable time frame to work with. Hopefully they will make other improvements before this date."

Ross said since the center's officials made it clear they intend to stay in the current building, city officials had to "pin down ... this is what you have to do to stay in the building." **Ross** said it is in "everybody's interest" that the work is started soon. The center operates as a museum, and hosts families and schoolchildren on field trips. Rivers did not know when the work will begin because center officials are still collecting estimates. The center continues to raise funds for not just the immediate repairs, but those needing to be made long term, such as new paneling, repairing steps, repairing deteriorating bricks and plumping repairs. Other repairs will also have to be made to make the building more accessible, such as installing a lift.

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

The Daily Citizen (GA)

January 2, 2014

‘The History of Me’**Emery Center Still Faces Uncertain Fate**

Author: Misty Watson

The Emery Center isn't just the history of the Emery Street School, of Dalton or of black culture. For Raleigh Sprowl, it's also the history of him. And not just him, but of all the students who once attended the school. "I have great-grandchildren, and I want them to be able to see this," said Sprowl, a Dalton resident who graduated from Emery Street School in 1953. "They can see the history of me here. We can't just let this go to waste." City officials told Emery Center representatives if they had not made much-needed repairs to the building by the end of 2013, it would have to close its doors. The center has been housed in the school building, which was constructed in 1924, since 2003. The building is owned by the city of Dalton, and the lease signed by the two parties says the center is responsible for maintenance.

The center, a nonprofit multicultural heritage center, did not have the money to make the repairs. Curtis Rivers, director of the center, feared not enough funds would be raised in the given time period. And they weren't. Yet, the center remains open. The center's deadline was extended to a date not yet set. "Curtis has been very proactive," Dalton City Administrator **Ty Ross** said. "He has designed a meeting to give us a status report about their fundraising. They've made substantial progress. ... We're going to have a sit-down with his team and see where they are going forward." **Ross** said city officials never wanted to see the center close. He plans to talk to council members at Monday's meeting to schedule the meeting with Rivers. "We want everybody to get on the same page and the same mindset and be motivated toward improvement," **Ross** said. "My hope is that we're getting there. We're very much in support."

Ross said it's up to council members whether any city funds will be provided to help with the repairs, estimated to cost at least \$80,000. "The measure is going to be the commitment and progress made by the Emery Center folks," **Ross** said. Repairs include a new heating, ventilation and air conditioning (HVAC) system and repairs to the roof as well as a fire alarm upgrade. The first step was to replace the HVAC system, estimated to cost \$60,000. Rivers wouldn't provide a total on how much has been raised so far, but said he hasn't reached the initial \$60,000. "We have money coming in," he said. "We've had donations as small as \$10 and as large as \$5,000. I appreciate those who have donated. ... We're not soliciting money for our daily business. We need it now for repairs. We've never asked for \$60,000 before."

Rivers had asked members of the Dalton City Council for help with funds. "We've had meetings and decided what was necessary, set parameters on what was to be raised by the Emery Center and what the city would do," said council member George Sadosuk. "So far those parameters have not been met. ... It was supposed to have been done by the end of the year, and the end of the year has come and gone." Sadosuk referred questions about the specifics of the parameters to council member Gary Crews, who said he didn't have the information immediately available

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

Thursday afternoon. Crews said he doesn't know where he stands on approving funds for the center currently because he wants to wait until after the meeting with Rivers to decide. "I'm sure if they've got some folks that are stakeholders, ready to step up, I'm confident the council will be open to look at any proposal they may have," Crews said. "I feel like if there's an interest, and there's interest in matching (funds), I'm sure the council will be open to it."

The Emery Street School was the only black school in the community. Schools were integrated in the 1960s and the building was used as City Park Junior High for several years. Debra Parks Hall was a student at Emery Street when schools were desegregated. "I was only here three years, but they were memorable years," Hall said. "It seems like the teachers were more personable. You knew how to behave and you were respectable. It was an extension of our home." When schools were integrated, Hall attended Fort Hill. "Everything was so different," she said. "Me being there was just as different for them as it was for me. I'd walk back down that hill. I did not want to be there." Hall said she is doing all she can to help preserve the center. "It's part of our heritage, not just our history," she said.

Sprowl said he hopes the city and center officials can reach an agreement so the center can remain open. "I don't want to see this go," he said. "All of our memories are right here. The things we received to venture out in life, all our principles, we received here. ... I hold this place very highly. This is the only place that has our history." Sprowl said anytime his family or friends visit from out of town, they want to see the school. "This building identifies us," he said. "Curtis and Patricia Rivers and others who have worked on this building have made this kind of like a sanctuary. I don't want the city to forget it." Rivers said if anyone wants a tour of the facility he will arrange it "at their convenience, not mine." "Any questions, to do a tour, call me, I would be happy to show it to them," he said. "It's a multi-cultural center, not just for African-Americans. This is not just for us, but for all of Northwest Georgia."

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

Dalton State Roadrunners (GA)

December 3, 2013

Dalton City Administrator has Roadrunner Sports on His Mind

Author: Unknown

Dalton city administrator **Ty Ross** would like to see affluent families get even more involved in Dalton State athletics. Addressing Monday's meeting of the Kiwanis Club of Dalton, **Ross** noted that Roadrunner sports skipped a generation. While his father had the opportunity growing up to cheer on the Roadrunners he did not because the athletic programs were shuttered. "Fortunately the Roadrunners are back," said **Ross**. "My father regularly takes his grandchildren to Dalton State games."

Ross, a college sports fan and former letterman at the University of Georgia, brought a basketball that his son received at the Tony Ingle Basketball Camp. "Support of Dalton State athletics needs to be one of our top priorities," **Ross** told the luncheon meeting at Northwest Georgia Trade and Convention Center. "We need to provide our kids opportunities that I didn't have growing up." He showed the group an aerial photo of the new soccer/football field at Lakeshore Park. The facility should one day be home to Dalton State soccer. The DS logo is already placed at mid field on the regulation size artificial turf field. Stands are in place, but would likely be in need of expansion when the day comes.

The aerial photo of the soccer/football field at Lakeshore Park. Lakeshore is also the home of Roadrunner tennis and a cross country course is planned with a start and finish at the park. **Ross** pointed out that the trade center is the home of Dalton State basketball. Home games and some practice sessions are there. In addition, the basketball offices are located across the hall from the arena entrance. The speaker suggested that affluent individuals should look into endowments for athletic scholarships as well as helping with funding the construction of additional athletic facilities as the need arises.

Dick Lowrey Recognized

Ross said the city has made a lot of progress during Dick Lowrey's 20 years of service on Dalton's city council. Lowrey chose not to run for re-election this year. The railroad freight depot in downtown Dalton was a deteriorating eye sore that has been "brought back" with the help of state and local funding. The Dalton Public Schools central office has been moved into city hall. The school central had been located in a building that was once the post office on Hamilton Street. That building has been updated and now houses the Carpet and Rug Institute and the Greater Dalton Chamber of Commerce. "It is now the headquarters for regional economic development," said **Ross**.

James Brown Park has been updated with beautiful new ball fields. The Mack Gaston Community Center attracts over 75,000 people a year, he said. "And that's just the people who register." The city has new play areas throughout. That includes the water feature at Mack Gaston. Plans are in the works for a "world class" park at Dalton Green. Dalton's municipal

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

airport is an economic engine that has attracted many corporate jets. The airport had been hurt by a line of trees at the end of the runway. As a result, the FAA had made the city turn-off the airport's instrument landing system. **Ross** said the problems have been resolved and the system should be back on by the end of the year. The site of the old Lee Printing Building on North Hamilton has been acquired by the city. They hope to "repurpose the site" into a new downtown commercial center. Most of the building has been vacant for a number of years.

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

The Daily Citizen (GA)

July 18, 2013

Land Bank May Help with ‘Carpet Capital Makeover’

Author: Charles Oliver

Look around Dalton and you’ll find them. Properties that have been abandoned by their owners. If they aren’t run down, they are on that path. Often, the back taxes and penalties on those properties exceed what they’d bring on the market, and even if they don’t, prospective buyers can’t find an owner to sell them. “What we want to do is to bring those properties back into the market and get them generating taxes again,” said Dalton City Administrator **Ty Ross**. The Dalton-Whitfield Land Bank Authority is the tool officials plan to use to bring those properties back into the market. The land bank has been around for about five years, but a law passed by the General Assembly in 2012 gives land banks more flexibility than they had before, if officials choose to exercise it.

Ross explained that the new law allows land banks to include more than one city and county, so members could conceivably invite some of the other cities in Whitfield County to take part. They could also see if Murray County officials want to take part. It also gives land banks a new source of funding, allowing them to keep up to 75 percent of taxes generated by any properties they sell for up to five years. Land bank authority members expressed an interest in making such changes, and Chairman Gary Crews, who is a member of the Dalton City Council, asked **Ross** and County Administrator Mark Gibson to draft a proposal for members to consider in six to eight weeks. Land banks do not have the power of eminent domain. They cannot condemn and take properties, and the changes in the law do not give them that power. But they can accept donations of property from other governments or from private citizens and organizations.

Ross said when individuals or organizations donate property to local governments those governments become responsible for paying the latest taxes on those properties. The land bank does not. The land bank can also waive back taxes on property donated to it. Land bank board member Lynn Laughter, a member of the Whitfield County Board of Commissioners, said she does not want the land bank to become a vehicle for property owners to avoid paying taxes. Whitfield County Tax Commissioner Danny Sane said that his office collects all the taxes it can, but in some cases that is simply impossible. Dalton officials have taken a greater interest in the land bank during the past year as part of their Carpet Capital Makeover plan, which aims to remove blighted properties and to keep other properties from becoming nuisances. That plan also involves a greater emphasis on code enforcement, and the Dalton Police Department added an officer earlier this year whose primary duty is enforcing the city’s building code. **Ross** said it is easier for the land bank to sell property than it is for local governments, since it has few legal requirements to meet, so it can move properties donated to it back onto the market more quickly than governments can. Crews said that though he hopes the land bank will become more active it will not be in competition with local developers and realtors. “We want to be business friendly, entrepreneur friendly and community friendly,” he said. “The properties we will be dealing with are not in the market.”

**Internet – Newspaper Archives Searches
James Tyson Ross**

(Articles are in reverse chronological order)

The Daily Citizen (GA)
August 8, 2012

Dalton Officials Plan ‘Carpet Capital Makeover’

Author: Charles Oliver

Dalton officials say the city needs a facelift and they have a plan to get rid of its unsightly blemishes. City Administrator **Ty Ross** outlined what he called the “Carpet Capital Makeover” Tuesday night at the council’s meeting. **Ross** said council members asked for the plan after attending a Georgia Municipal Association meeting earlier this year in which Mayor David Pennington attended a session on urban revitalization.

Ross said the plan has three elements:

1. Increased code enforcement to keep minor issues from developing into large ones.
2. Keeping a close eye on foreclosed and abandoned properties and maintaining a list priority properties.
3. Abatement and redevelopment. **Ross** said the General Assembly passed a law earlier this year giving local governments greater powers to create “land banks” and use them to redevelop surplus properties.

Ross said the city would not take property from owners. “These properties are long gone,” he said. **Ross** said the next step before implementing the plan is to hold meetings for input from the public and to fine tune the plan. City Council member Gary Crews said public input is essential for the plan to work. “I know that one group I’d like to hear from is the realtors. They are dealing with these issues every day,” he said.

Council members also heard a presentation from Ed Painter, a local tea party activist, who asked them to consider a resolution asking the General Assembly to repeal the Transportation Investment Act of 2010, which created the regional Transportation Special Purpose Local Option Sales Taxes (SPLOSTs) that Georgians voted on in the July 31 general primary. Voters in the Northwest Georgia area, which includes Whitfield County, rejected the TSPLOST. But Painter said the law still penalizes them because areas that rejected the TSPLOST will have to match state transportation funds at 30 percent, while areas that passed the TSPLOST only have to match 10 percent. Painter said it is “un-American” for legislators to punish voters for not voting the way lawmakers want.

City Attorney Jim Bisson said he would see if the council has the legal authority to approve such as resolution. The council voted 4-0 to:

- Accept the former headquarters of the Greater Dalton Chamber of Commerce on College Drive for \$10. **Ross** said city officials and Dalton Utilities are looking to build a retention pond on the site to help control flooding on McClellan Creek. The chamber moved into the old post office on Hamilton Street, which is owned by the city, earlier this year.

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

- Approve a five-year lease with Georgia Mountains Health for the health center in the Mack Gaston Community Center. Georgia Mountains Health will pay \$1 a year for the space.
- Approve a \$16,960 contract with Kadima Inc. to remove asbestos from the old City Park School building on Waugh Street and from the Crescent City train car.
- Approve an amendment to the 2012 budget that, among other things, provides more money for a new recycling truck and approves the city's matching funds for a federal grant for safety improvements at Dalton Municipal Airport. Public Works Director Benny Dunn said new federal emissions rules have driven up the price of recycling trucks by about \$10,000 since the council originally budgeted for a new truck last year.
- Designate the city administrator as Dalton's open records office. The Georgia General Assembly passed a law earlier this year mandating local governments designate someone to handle all open records requests.
- Approve beer and wine pouring licenses for Momoya restaurant and beer, wine and liquor pouring licenses for Tijuana's Mexican Restaurant No. 2.

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

Daily Citizen, The (Dalton, GA)

March 8, 2012

Alcohol, freeport could sway merger decision

Author/Byline: Charles Oliver

A merger between the city of Dalton and Whitfield County governments could make it harder for city residents to buy or to sell alcoholic beverages. It could also raise the “freeport” tax exemption for inventory. Dalton and Whitfield County currently have very different alcohol laws. The county basically permits only the sale of beer and wine, both by the drink and in retail stores, Monday through Saturday. But Dalton also permits the sale of distilled spirits, and permits both retail sales and sales by the drink on Sunday. Whitfield County voters have rejected Sunday sales. Dalton and Whitfield County also have different freeport exemptions. The city currently exempts 20 percent of inventory from property taxes. Whitfield County also initially exempted 20 percent of inventory, but the Board of Commissioners voted last year to increase the county’s exemption to 100 percent.

“I don’t think there are any scenarios where consolidation is unfeasible. But alcohol and freeport add to the complications,” said Dalton City Administrator **Ty Ross**, a nonvoting member of the merger commission. The commission is currently working on a report that will summarize what it has found over the past eight months. **Ross** said members have been meeting with both the city attorney and the county attorney trying to determine exactly how a merger would affect alcohol laws and freeport but they don’t have definitive answers yet.

Board of Commissioners Chairman Mike Babb, a member of the merger commission, says the commission hopes to have an answer by next week. “We should know something when we meet on Wednesday,” he said. Babb said the “worst case scenario” is that the new merged government would make the county completely dry and that all of the referendums permitting the sale of alcohol would have to be passed again.

Ross said it is also possible the county’s alcohol laws would become the laws of the new merged government. “That’s what we are wrestling with right now,” he said.

In either scenario, Dalton stores and restaurants would see their ability to sell alcohol restricted. T.J. Kaikobad said that possibility is a concern for business owners. “We’ve got some very good ordinances (in the city of Dalton), ordinances that keep us as a viable option to Chattanooga, a viable option to Atlanta, a viable option to Cartersville,” he said. “To take three steps backwards when we are trying to grow our community doesn’t make any sense at all.” **Ross** said commission members are also looking at whether the county’s freeport rate would become the default rate for any new merged government.

The bill that created the merger commission specified that even if voters approve such a merger, Dalton Public Schools would remain independent. But the school system’s already tight finances would be affected if more inventory is exempted from property taxes. Dalton City Council

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

members have previously said they will not raise the city's freeport rate without the OK of the Dalton Board of Education. School Board Chairman Danny Crutchfield said board members want to move to 100 percent freeport eventually, but moving to 100 percent immediately "would be a significant financial hit to the school system."

The merger commission appointed a subcommittee to draft its final report, which members hope to have finished by next Wednesday. After the report is finalized, the commission will hold a public hearing and decide whether to recommend a full merger of the two governments, a merger of one or more departments or no change at all. Dalton City Councilman Gary Crews, who is also a member of the merger commission, said that vote will be determined by what the report says and that issues such as alcohol laws and freeport will play a key role in members' discussions. "We've learned a lot about each other, and I think we've found some opportunities to go forward. But after considering all these issues, it may make more sense to recommend a partial consolidation, not a full consolidation. I don't know yet. It will really depend upon what is in the report," Crews said.

Internet – Newspaper Archives Searches

James Tyson Ross

(Articles are in reverse chronological order)

The Daily Citizen (GA)

October 26, 2011

Crown Mill Store Named to ‘Places in Peril’ List

Author: Charles Oliver

The Georgia Trust for Historic Preservation has named the Crown Mill Store to its 2012 list of places in peril. “That may sound like a bad thing, but it’s actually good because it gives it a lot of attention and will make it easier for us to help restore it,” said Dalton City Administrator **Ty Ross**. The Hamilton family donated the store to the city two years ago. And the council approved a \$12,000 repair for the roof earlier this year. “That was the first thing to be done to stop the leaking. But it needs a wholesale renovation, which will be much more expensive,” **Ross** said.

City officials estimate fully restoring the building, including the roof work, will cost \$190,000 to \$200,000. “We don’t have a funding source for that yet,” **Ross** said. **Ross** said the city has been talking with the Whitfield-Murray Historical Society about how to best use the store. “The discussions have focused on using it to show the evolution of the bedspread industry to the carpet industry and basically making it a bedspread museum,” **Ross** said. The store was built in the late 19th century and served as the company store for Crown Mill workers for decades.

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

The Daily Citizen (GA)

October 11, 2011

Whitfield County Raises Inventory Tax Exemption

Author: The Dalton Daily Citizen

The members of the Dalton City Council are expected to approve a reduction in the property tax rate from 2.875 mills to 2.78 mills when they meet Monday night. The meeting will begin at 6 p.m. at City Hall. The net taxes levied for this year are projected to be \$9.2 million, a 4.5 percent decrease from last year, when \$9.647 million was collected, said City Administrator **Ty Ross**.

"That's not just due to the millage rate decrease, it's also due to reduction in property values because our digest last year was \$3.35 billion and this year it's \$3.31 billion," **Ross** said. Mayor David Pennington has said reducing the property tax rate helps the city with its plans "to make this one of the best places to do business in Georgia."

Also on the agenda for Monday night's meeting is a budget amendment totaling \$153,195 for a variety of purposes. Some \$80,000 is for equipment repairs for the public works department, while \$18,345 is for fire department equipment repairs (offset by an insurance reimbursement). Other expenditures are \$32,000 for the recreation department for scoreboards (offset by a donation from Coca-Cola), \$20,000 for the estimated cost of the November elections, \$15,360 for a shortfall in elected officials' health insurance premiums, \$15,000 for legal fees, \$12,040 for roof repairs to the old Crown Mill store, \$5,030 for Sister City events, \$4,765 for the 7-on-7 banquet at the trade center and \$1,000 for the Rebecca Ryan event on Oct. 13 at the trade center that will focus on attracting and retaining young professionals (the city is a co-sponsor). The money will come from the city's fund balance, **Ross** said.

Also during the meeting, Elyse Cochran, director of economic development for the Dalton-Whitfield Joint Development Authority, will make a presentation on tax allocation districts (TADs). Council members will also consider Community Home Investment Program (CHIP) policies and procedures, a commitment letter for the Dalton-Whitfield Community Development Corp. Shelter Plus Care Program, a contract between the city and KG&C Roofing Inc. for the roof repairs to the old Crown Mill store, a contract between the city and the Georgia Department of Transportation for the resurfacing of Glenwood Avenue and various appointments.

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

The Daily Citizen (GA)
September 3, 2011

**Commissioners Approve Revamped SPLOST Referendum
Proposed Arts Center Called ‘Moon Shot’**

Author: Mark Millican

The Whitfield County Board of Commissioners Friday morning unanimously approved a revamped two-year Special Purpose Local Option Sales Tax (SPLOST) referendum for November that includes a proposed performing arts and cultural center — “a big dream, a moon shot for the community,” said Dalton City Administrator **Ty Ross**. Commissioners rescinded their vote of just two days ago to place the \$35.7 million SPLOST spending plan before voters and then approved the new referendum, adding the \$12 million arts center project to the mix of proposed projects at the request of city officials while removing several other city projects. Some \$6 million for the arts center would come from the city’s share of the SPLOST collections, with the rest from Dalton Public Schools (as much as \$3 million) and other sources.

Ross said “anonymous donors” being “shepherded” by the Community Foundation of Northwest Georgia will contribute toward building the center. “The city of Dalton believes that this project is appropriate for a Special Purpose Local Option Sales Tax because this project is special,” **Ross** told the commissioners. “A project such as this would not occur in the city of Dalton without a (SPLOST) ... We think it’s a big dream, it’s a moon shot for the community, if you will, and it’s up to the community to decide whether or not the project goes forward.”

David Aft, president of the Community Foundation of Northwest Georgia, said before Friday’s meeting that foundation officials expect to play a role if the development of the center moves forward. “At this stage, the Community Foundation is interested in any project that promotes the economic development and cultural growth of our community,” Aft said. “We believe that a performing arts center and projects like that, which contribute to the overall quality of life, are economic development tools. We are excited about this opportunity.” But, Aft said, “At this stage, I don’t think we have enough details to understand what that role (of the Community Foundation) will be. We know this is only getting started, and as things become clearer, the foundation will have a better idea of how it can be most helpful.” A singer and songwriter himself, Aft said, “We are talking about a performing arts center that will be attractive to touring companies of Broadway plays, musical acts that need larger venues. The trade center, specifically, is not built to be a concert facility. We’ve had concerts up there. I’ve been to quite a number of them. But there are touring acts that have some specific requirements that we’ve not been able to meet.” He also said such a center will keep Daltonians in the area, noting that many residents often travel to Chattanooga and Atlanta to see plays and musical performances.

Dan Rogers, chairman of the Northwest Georgia Trade and Convention Center Authority, said earlier this week such a center could help the trade center. “I do not know all the details, but I would say that any project that would help the community would help the trade center,” he said. “I don’t think there will be any downside (for the trade center), but again, I don’t know all the

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

details.” City officials have said the opportunity to apply additional money to the SPLOST funds to pay for the performing arts center is one reason they decided to change their project list. As to the specifics of the center, such as how large it will be or where it will be located, “that will be a community discussion over the next couple of years,” **Ross** said earlier this week.

Creative Arts Guild Executive Director Terry Tomasello said before the vote that the size and location of the facility “will really determine its success or failure. I don’t really have enough information at this point to talk about it.” Another important factor is cost, she said. “We really only use the Dalton High School theater once a year for our annual holiday ballet,” Tomasello said. “That venue is adequate. As a nonprofit, it always boils down to one thing, and that’s costs. We are charged with being good stewards of every dollar we receive. Sure, it would be nice to be in a state-of-the-art performance center, but at the end of the day, cost will determine that.”

Tomasello said the Guild isn’t “equipped to bring in large shows and rent that sort of facility, so I don’t know that it will impact what we do here. We do a lot of small performances here at our facility, and that seems to be adequate for what the community requires of us. I don’t see that there will be a lot of opportunities for us to use it.” She did say there may be some value in having a facility that’s not connected to a school. “That limits some of the things you can offer,” Tomasello said. “For example, if you go to the Fox Theatre in Atlanta or the Tivoli in Chattanooga, during intermission if you’d like to have a glass of wine you can certainly do so. But you can’t do that at Dalton High School.”

The city also added \$2.7 million for design, engineering and construction of downtown greenspaces and greenways, including a Crawford Street linear park from Bill Chappell Stadium to the Wink Theatre with connections to the Crown Mill and Mill Creek Corridor. To include the performing arts center and greenspace funding, the city dropped several projects, including \$1 million for land acquisition to clear the glide slope at Dalton Municipal Airport; \$550,000 for construction, maintenance and repair of city of Dalton recreation department facilities and fields, including purchases of vehicles; \$1.75 million for capital equipment for the Dalton Fire Department, including purchase of fire trucks; \$550,000 for capital equipment for the Dalton Police Department, including police vehicles and computer hardware and software; \$250,000 for equipment for city of Dalton recycling and garbage pickup services; and \$4.6 million for construction of and improvements to city of Dalton road, street and bridge facilities.

Commissioner Greg Jones asked if there were any changes on the Whitfield County project list. “At South Park,” Commission Chairman Mike Babb replied. “We did have in there an open-ended statement about purchases of land for recreation, and I was told they were going to clarify that after they got some calls from the south end of the county, and it was to be state land purchased for South Park. “To the best of my knowledge there were no changes made except for clarifying what was to be purchased ... All the numbers on our side stayed the same.”

Type of Project Proposed Estimated Costs

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

- Parks/Recreation (Countywide Tier II), Westside Park construction; improvements to Dawnville Park, Edwards Park and Pleasant Grove Park; land acquisition for new Southside Park; other parks/recreation expansion or improvements, \$9,749,500
 - Public Safety (County Project), purchase and equip sheriff's patrol vehicles, \$1.68 million
 - Public Safety (County Project), purchase and equip fire trucks/ladder truck, \$2.1 million
 - Public Safety (County Project), land acquisition, design, engineering, construction of fire station(s), \$3.15 million
 - Quality of Life/Economic Development (Countywide Project), library capital improvements, \$250,000
 - Roads, Streets, Bridges (Countywide Project), re-surfacing of multiple roads, \$5.25 million
 - Roads, Streets, Bridges (County Project), road construction equipment for Public Works Department, \$1.05 million
 - Economic Development/Debt Service (County Project), improvements to Carbondale Business Park, including payment of existing debt service, \$2,393,500
 - Economic Development/Quality of Life (City of Dalton Project), land acquisition, design, engineering and construction of performing arts/cultural center, \$6 million
 - Parks/Recreation Enhancements (City of Dalton Project), design, engineering and construction of downtown greenspaces and greenways, to include Crawford Street linear park from Bill Chappell Stadium to Wink Theatre and connections to Crown Mill and Mill Creek Corridor, \$2.7 million
 - Parks/Recreation (City of Tunnel Hill Project and Countywide Project), design and construction of gymnasium/community center (\$500,000 county, \$227,000 Tunnel Hill share)
 - Administration (City of Varnell Project), construction of City Hall, \$300,000
 - Parks/Recreation (City of Varnell Project), improvements to parks and recreation facilities, \$175,000
 - Parks/Recreation (Town of Cohutta Project), improvements to parks and recreation facilities, \$175,000
- Total: \$35.7 million

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

The Daily Citizen (GA)

April 16, 2011

Dalton Received \$100,000 for Trails

Author: Charles Oliver

The city of Dalton has received a \$100,000 grant from the Georgia Department of Natural Resources to create five miles of hiking and mountain biking trails on Mount Rachel. The grant was one of 25 trail grants totaling \$2.1 million the department announced in a press release. Dalton City Administrator **Ty Ross** said he expects the city will get the funds in late September and should begin construction then. **Ross** noted Civil War breastworks sit on top of Mount Rachel, and the trails will open up access to them. “These are already some of the more easily accessible fortifications in the area. What we want to see is local schools taking classes up there, as well as recreational hikes and bicyclists using the trails,” he said.

The grant calls for a 20 percent match from the city. The city has also applied for a \$1 million grant from the Georgia Department of Transportation for trails to link Mount Rachel with the Haig Mill lake, Mill Creek and the Crown Mill area. **Ross** said he expects to receive word on that grant soon. City officials refer to these areas as Dalton’s “green hat.” Officials have already used federal community development block grant money to help the Whitfield-Murray Historical Society repair the Hamilton House, Dalton’s oldest brick house, and reopen it to the public. They have also acquired the nearby Crown Mill store and hope to acquire some of the old mill houses in an effort to reinvigorate the Crown Mill area. The trails, the work in the Crown Mill area and other plans are part of an effort to make the city more attractive to young, college-educated residents and visitors.

Internet – Newspaper Archives Searches
James Tyson Ross

(Articles are in reverse chronological order)

Chattanooga Times Free Press (TN)
December 7, 2010

Dalton, Whitfield Tackle Budget Cuts

Author: Andy Johns

Dalton City Council members discussed a budget for 2011 Monday that would cut nearly \$1.6 million in spending. A few blocks away Whitfield County commissioners wrestled with budget cuts of their own. City officials proposed a \$25.7 million budget to council members for 2011, down from the current year's \$27.3 million. Administrators forecast \$16 million in revenues from taxes and fees, in addition to \$9.9 million in utility income. The taxes are down about \$2 million from 2010, but the utility money is up by more than \$1 million.

City Administrator **Tyson Ross** said the sales tax revenues were "starting to tick back up a little bit," but he and other officials were cautious about future projections. "I think you hope for the best but expect the worst," **Ross** said.

There will be a hearing on the Dalton budget at 10 a.m. Monday at City Hall. Dalton Mayor David Pennington praised employees and department heads for working more efficiently and saving the city money without reducing services. "This could not have been possible without them," he said. Despite the cuts, Pennington said the city has been able to reduce taxes for the fourth year in a row. Most of the spending cuts come from having fewer building projects on the 2011 plan, according to **Ross**. Pennington said strength in the carpet industry has kept the city going. "They didn't ask for a bailout and they're still paying their bills, which helps us pay ours," he said.

At the county meeting, commissioners neared the completion of their budget, which was drafted in August. Commissioners are looking at a \$41 million budget that is \$2.7 million less than in 2010 and \$5 million less than initial requests for 2011. In a work session before Monday's commission meeting, the board discussed providing lump sums to departments and letting the department heads pick where to cut, rather than going through line by line themselves. County Finance Director Ron Hale said the budget discussed Monday won't change much before it is presented at a hearing on Dec. 20 and voted on Dec. 27. "I think this is going to be more or less what goes out," he said.

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

The Daily Citizen (GA)

October 28, 2010

City Moves to Collect Forfeited Bonds

Author: Charles Oliver

Dalton officials say they are prepared to seize property from three bonding companies that together owe Municipal Court more than \$70,000 in forfeited bonds if the companies don't pay up. On Monday, the city sent registered letters to AGV Bonding, A-Bail Bonding and Dalton Bail Bonds asking them to explain how they will pay their debts. "Otherwise, we will pursue a levy on their property in accordance with Georgia code," said City Administrator **Ty Ross**. **Ross** said the companies have 10 days from receipt of the letter to present a plan to repay the debt. "All at once would be ideal. But if somebody, in good faith, wants to chip away at that over time, we are open to that discussion," he said.

Ross said that as of Wednesday afternoon he had not been contacted by officials with any of the companies. **Ross** said Municipal Court currently accepts bonds only from A-1 Bonding Co., Huckabee Bonding Co. and Cohutta Bonding. **Ross** said A-1 and Huckabee are up to date with their payments and Cohutta reached a settlement with LST Recovery Group, a collections agency the court had previously hired to collect forfeited bonds and civil fines. Data provided by the city show Dalton Bail Bonds owes a total of \$27,680 for bonds forfeited when defendants did not show up for court, AGV Bonding is shown as owing \$23,682, and A-Bail Bonding is shown as owing \$19,566.

The forfeited bonds became an issue after the City Council fired judge Jerry Moncus and asked court administrator David Hamil to resign last month. While council members said they had "philosophical differences" with Moncus and Hamil — they have not elaborated — Moncus said problems began when the court began to try to collect from the bonding companies. Hamil said "political pressure from the individuals involved in the bonding business and others" led to the two men's ouster.

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

The Daily Citizen (GA)
September 8, 2010

Dalton's Future will be Topic of College Class

Author: Charles Oliver

Some 40 students from the Savannah College of Art and Design (SCAD) will come to Dalton this fall to help city officials find ways to attract young, creative professionals. "They will be up here Sept. 24 and 25. They'll be sitting down and talking with City Council members about various possibilities, and they'll also be driving around and looking at the city," said City Administrator **Ty Ross**. The trip is part of a class the students are taking called "What's Next for Dalton." The City Council voted 4-0 on Tuesday to approve an \$18,000 contract with the college to conduct the class. "This is in relation to the City Council's plans to make Dalton a much more attractive place for young educated people to move back to, to live in and start businesses in," said Mayor David Pennington.

The class will bring together students from SCAD's urban design, historic preservation, design management and advertising departments to put together a downtown master plan and city marketing plan. **Ross** said the work builds on work done earlier this year by interns from SCAD and from the University of Georgia's Archway program. Those interns, who spent the summer in Dalton, produced plans for the redevelopment of Crawford Street and the Crown Mill area. "This will be much broader in scale. The students who were here this summer were landscape architects. The students in this class come from a broader range (of disciplines)," **Ross** said.

Ross said the students, who have already made one trip to Dalton, will deliver a report to the City Council at the end of the school quarter. City Council members are already moving ahead on plans for the Crown Mill area, which include a new park. They tabled a contract with American Consulting Professionals to provide environmental assessment of that park at Tuesday's meeting. Some council members wanted more information on the project. But the council is slated to vote on it at their next meeting on Sept. 20. The council is holding off for now on the proposals for Crawford Street, which include reducing it from five lanes to two and creating a mall in the center of the street. Some local merchants and property owners have expressed concerns about what those proposals might do to parking. "The council is still talking to them about their concerns, so they decided to split these projects and go ahead with the Crown Mill ideas," **Ross** said.

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

Daily Citizen, The (Dalton, GA)

June 26, 2010

SCAD hooks up with Dalton

Author/Byline: Rachel Brown

Kevin Auerbach didn't have to think very hard when he received an offer for a summer internship that included free housing, free gym membership and a chance to get paid to work in his area of expertise. "It was extremely easy to come here and just do what we do best, which is design," said the Savannah College of Art and Design (SCAD) student who is majoring in industrial design with a focus in sustainability. Auerbach is one of 26 students in Dalton this summer through an internship program offered through SCAD, the American Floorcovering Alliance and nine AFA member companies in Dalton. AFA board chairwoman Wanda Ellis said the first-time initiative came about as the organization was looking for ways to "bring some focus back to the industry." "We have been thinking for a long time about having a design school or some type of facility here in Dalton," Ellis said. While talk among city and AFA officials is under way about the possibility of bringing a SCAD satellite campus to Dalton, college officials said there are no plans now to extend the relationship that far. "At present, SCAD has no plans for expanding our university locations beyond Savannah, Atlanta, Hong Kong, Lacoste, France and e-Learning," school spokeswoman Leann Hand said in an e-mail. "We are pleased to be working with the American Floorcovering Alliance on internships for some of our talented students this summer. We are certain it will be a great experience for the students and the companies." AFA officials visited SCAD in November 2009 for initial talks, Ellis said, and college officials visited Dalton in February. In April, AFA officials again went to Savannah to tour the campus and speak with representatives, and several member companies attended a job fair at the school in May. Long-term goals for the AFA include bringing an entire study program to Dalton, Ellis said. "But the first step that SCAD wanted us to do was to see if the interns would come up here and to see if the industry and our community would support a design school up here," Ellis said. Allyson Faulk, Mohawk Industries' creative design manager, said creating a partnership between the industry, the city of Dalton and SCAD could potentially boost the city's economy and strengthen its long-term economic and quality of life goals through the University of Georgia's Archway Partnership with Whitfield County and the city of Dalton's Vision 2018 Plan. Peter Sigmon, vice president for innovation at Shaw Industries, said there is the possibility of building upon the current relationship with SCAD. "The potential of locating a world class design campus such as SCAD in Dalton will offer new opportunities, bringing diverse backgrounds and perspectives into the workplace," he said. The interns work varying full-time schedules but are all working during June and July.

Dalton City Administrator **Ty Ross** said the idea originated with the AFA, but city officials have thrown their support behind it. "The mayor and council supported their endeavor because it fit in with their overall plan to make the city more inviting for young people, and the idea of having interns or more young people from a college campus just made a lot of sense," he said.

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

The Daily Citizen (GA)

February 5, 2010

Trail Plans Could Link Dalton's Parks and Recreation Sites

Author: Charles Oliver

Spanning more than 300 miles, the Pinhoti Trail offers hikers and mountain bikers a trek through some of the most beautiful mountains and valleys in northern Alabama and Georgia. But as it passes through Dalton, the verdant forests and rippling streams give way to traffic and fast-food restaurants. The trail currently runs from Snake Creep Gap near Villanow to the top of Dug Gap Mountain. From there it follows Walnut Avenue/Highway 52 to Murray County. But that could change, thanks to some plans currently being put together by the Northwest Georgia Regional Commission and the city of Dalton. One plan the commission has developed calls for a trail running about seven miles from Dug Gap Battle Park to just behind the Georgia State Patrol barracks in Rocky Face. That would connect the Pinhoti Trail with the George Disney Trail.

Bradley Kotrba, a community planner for the regional commission, says he and city officials have also talked about extending the trail from Rocky Face along Mill Creek into Dalton. From there, he said, it could be taken from Dalton to the Conasauga River and on into Murray County eventually. That would allow the route of the Pinhoti Trail in Whitfield and Murray counties to be moved onto the new trails and off Highway 52. "I know the Pinhoti people would like to take that trail past the Vann House (in Murray County) because it's a historical site and then into the national forest," Kotrba said. The Pinhoti Trail connects to the Appalachian Trail via the Benton MacKaye Trail at Springer Mountain in Fannin County. Kotrba said the Pinhoti, in turn, connects with trails in Alabama that go all the way down into Florida.

Kotrba and Dalton city administrator **Ty Ross** met with officials at Dalton State College on Friday to discuss their plans. Volunteers at DSC are working on cutting walking trails into the area behind the college. And the two groups discussed ways to integrate their plans. One entrance to the trails being built at the college will be near the south entrance to the gym. Another will be near the parking garage. One idea the two sides discussed was creating one or more spurs going up the ridge to connect the college trails to the planned Pinhoti connector. In fact, Kotrba said the area has numerous small trails that have been cut by property owners and cycling or hiking enthusiasts that could be connected to the Pinhoti connector.

Kotrba said grants from the Georgia Department of Transportation and Department of Natural Resources could cover at least the planning of the Pinhoti connector and other trails in the area. Officials said much of the land that the connector would use is owned by the city of Dalton or Whitfield County but they will also have to work with numerous property owners to acquire right of way. **Ross** said the connector is just one part of the city's plan to make it more attractive to hikers, bikers and other outdoor recreation enthusiasts. "The idea is to connect our parks and public areas," he said. **Ross** said the city envisions the trails following local creeks and railroad right of ways. He said one thing he'd like to explore is creating a trail around the Dalton Utilities reservoir at Haig Mill Lake and possibly creating a picnic area there and using it for recreation.

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

Reached after the meeting Friday afternoon, Dalton Utilities president Don Cope said he is receptive to the idea and had proposed something similar several years ago. But he said there are hurdles that would have to be overcome. "It would have to be very controlled and very limited access controlled by the utility," he said. "That is a public drinking water supply that is directly connected to the treatment plant. Since 9/11, the security requirements on public drinking water supply have gotten tighter and tighter. All of our reservoirs are under lock and key and 24-hour surveillance and security." Cope also said motorized boats could not be used on the reservoir because of the possibility of fuel and oil getting into the water supply. While the city is looking at creating trails to connect various spots in the city, the regional commission is planning hiking and biking trails that will connect all of Northwest Georgia. "In 20 years, this entire Northwest Georgia area will be linked with trails that will run over into Alabama and down into the Atlanta area," Kotrba said.

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

The Daily Citizen (GA)

November 7, 2009

New Dalton Administrator Eyes Bike, Walking Trails

Author: Charles Oliver

Some people look at the various creeks crisscrossing the Dalton area and see only water. New Dalton city administrator **Ty Ross** looked at them and the railroads that pass through and saw dozens of miles of bicycle and walking trails. “I came up with the idea after talking to the local cycling club. They want a safe way to get from town to the routes on the north end of the county and the west end of the county,” he said. **Ross** asked the Northwest Georgia Regional Commission, which is working on ways to expand bicycling opportunities across the region, to map out some of the possible routes.

The trails would connect the various parks and recreation facilities across the county as well as undeveloped greenspace. **Ross** said the city could get state and federal transportation money for the project. “It’s all very much doable, but even if we accomplish only 50 percent, we immediately become one of those pedestrian and cycling friendly communities that make those national lists for quality of life,” he said.

Shane Adams, co-owner of Dalton’s Bear Creek Bicycle Co., said local cyclists were excited to hear about the proposal. “This goes beyond current cyclists and could give recreational opportunities to all citizens of Dalton,” he said. “It will give trail runners and pedestrians more opportunities.” He pointed to the city’s Raisin Woods mountain bike park, which he says is used by numerous people every day. “If you build it they will come, and I think Raisin Woods shows that,” he said.

Mayor David Pennington said the plan fits into the city’s efforts to make the area more attractive to young, educated people. “He (**Ross**) came up with this idea that he thought was workable, and we told him to go for it,” Pennington said. **Ross** started as city administrator in early October. He was selected by the City Council following a 13-month search after former administrator Butch Sanders stepped down in July 2008. **Ross** is being paid \$82,200 a year and receives a \$750 a month vehicle allowance. Like other city workers, he does not have a contract with the city. “He’s doing a good job of communicating with the council, and he’s doing a good job at handling the things he has been asked to deal with,” said council member Dick Lowrey.

One of the first tasks the City Council handed **Ross** was to work with department heads to develop a long-term plan for the city. “My duty within the strategic plan is to work on economic development and redevelopment of the city,” he said. “That includes this neat transportation and recreation project.” **Ross** said he is also trying to find a way to do a similar project focused on downtown Dalton that would make it more friendly to bicyclists and pedestrians. Chuck Dobbins, chairman of the Dalton-Whitfield Joint Development Authority, says having a city administrator on board to work with staff of the JDA and the Dalton-Whitfield Chamber of

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

Commerce is a big plus. “I feel good about Ty, and his knowledge of the community will be good for all of us working together,” he said.

Ross, a former assistant dean at Dalton State College, is working full time as administrator, but he is also finishing his obligations at the college by teaching two classes he had begun before being selected. “Two days a week, I leave here to teach, and I also teach two nights a week,” he said. Lowrey said council members knew **Ross** would finish teaching those courses. “He’ll be able to do more once that’s finished, but it hasn’t gotten in the way of anything we’ve asked him to do,” he said. **Ross** said he’s currently helping the council draft its 2010 budget and serving as the point man in discussions with the Dalton Board of Education to move school administrative offices into City Hall, which officials hope can cut spending by allowing the two governments to share the costs of one building.

Ross says he is also working on a retreat for city officials, Dalton State officials and others to Columbus, Ga. **Ross** said city officials there have helped Columbus State University create a presence downtown and it has proved a big boon to the area. He said he wants Dalton officials to see how that might help them in their plans to create some sort of campus for Dalton State College in downtown Dalton. “I don’t think there’s anything he’s not doing today that we would ask him to do, but I do think he’s going to grow in all his areas of responsibilities,” said council member Charlie Bethel.

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

Chattanooga Times Free Press (TN)

September 22, 2009

Ty Ross Picked to Fill City Administrator Post

Author: Kelly Jackson

The city's days without an administrator are over. The City Council voted Monday night to hire **James Tyson "Ty" Ross** to fill the position, which has been vacant since the city's last administrator, Butch Sanders, resigned in July 2008. "We think this person can hit the ground running with the things we are trying to get accomplished," Mayor David Pennington said after the meeting. City officials had narrowed the field of about 86 applicants to two top candidates. Mr. Pennington said finalists were **Mr. Ross**, who is assistant dean in the school of business at Dalton State College and a licensed attorney, and Karen Nelson, a business consultant who's worked with Shaw Industries Inc. "Both candidates were extremely well qualified," said Mr. Pennington. "It was a difficult choice."

Mr. Ross and Ms. Nelson didn't attend the meeting to find out who had been chosen for the job, but **Mr. Ross** said in a phone interview afterward he watched council members announce their decision live on the city's Web site. "It was completely humbling to be chosen by friends and neighbors to do a job such as this," **Mr. Ross** said. Mr. Pennington said **Mr. Ross** was selected because of his business background, legal knowledge and experience with the college. He said **Mr. Ross** should be in his new position with the city full time by Jan. 1, 2010. Details of his start date and salary have not yet been finalized, officials said. Mr. Pennington said **Mr. Ross** will play a major role in matching city projects with available state and federal grant money. "That's one of the things we want him to really concentrate on," he said.

Alderman George Sadosuk said council members took their time to find the best candidate. "We were looking for something more out of the box," he said. "We felt like the department heads really stepped up and were doing such a good job, we didn't feel a rush to go in and appoint an administrator." **Mr. Ross** said he'll be an "action agent" for the mayor and council, ambassador for Dalton and adviser to the city. "I am chomping at the bit to get going," he said.

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

The Daily Citizen (GA)

September 8, 2009

City Looks at Two Prospects**Ross Sees Role as Advisor to Council**

Author: Charles Oliver

J. Tyson “Ty” Ross recalls fondly his days as an assistant to University of Georgia athletics director Vince Dooley. “He’s into gardening, and on Saturday, I’d get a call on my answering machine from him saying that he’s out and about and he’s engaged in horticultural experimentation and he wondered if I could come over and join him,” **Ross** said. That meant, he said, that Dooley wanted to know if he could come over and help with yard work. **Ross** said he learned a lot from Dooley, including that the best way to motivate people is with your own enthusiasm and willingness to work. “The guy never told me to do anything. That’s the way he was with everybody. It was almost magical the way he could motivate people,” **Ross** said. “He could get people to do something because they really wanted to, not because he told them to.”

Ross said he’ll try to apply some of those lessons into Dalton City Hall if he is selected by the City Council as the next city administrator. The city must wait at least 14 days from the time the finalists were announced, Aug. 27, before announcing a decision. The city did not advertise a salary for the position. **Ross** and Karen Nelson, a business consultant and former corporate diversity manager for Shaw Industries, were named the finalists. Former city administrator Butch Sanders stepped down on July 17, 2008. A native of Whitfield County, **Ross** grew up in the Beaverdale community and in the Cohutta area.

He graduated from Northwest Whitfield High School and earned a bachelor’s degree in history from the University of Georgia, a law degree from Georgia State University and a master’s of business administration from Kennesaw State University. He practiced business law for six years with Mitchell & Mitchell and with Minor, Bell and Neal. For the past year, he has served as assistant dean of the Dalton State College business school, where he teaches, advises and coordinates the school’s accreditation and internship programs. “I’m a big believer in the college and what it means to this community,” he said. Council members said they are not looking for a typical city administrator who would run the day-to-day operations of the city government.

Noting that several city departments report to boards and commissions, not the administrator, they said they are looking for someone to help with strategic planning and economic development. “I’m not a micromanager, and I don’t think they are looking for a micromanager. We have superstars as our department heads, and they are well managed by citizen commissions,” **Ross** said. He said a key part of his job will be as an adviser to the City Council. “I think I bring a lot to the table with my experience as an attorney,” he said. **Ross** said he also sees the administrator as “an ambassador for the city,” helping businesses and individuals find out more about the city and what it has to offer. Finally, he said, the administrator must be “an action agent for the mayor and council.” “They have an agenda, and it’s my job to move it forward,” he said.

Internet – Newspaper Archives Searches

James Tyson Ross

(Articles are in reverse chronological order)

Ross and his wife Jennifer have two sons: James, 4, and George, 2. **Ross** is active in a number of community organizations and serves as chairman of the board of Cross Plains Community Partner and as a member of the steering committee of the United Way of Northwest Georgia's Young Leaders Society.

Internet – Newspaper Archives Searches**James Tyson Ross***(Articles are in reverse chronological order)*

The Daily Citizen (GA)

May 14, 2008

Tax Rebate + Right Deal = New HomeAuthor: **J. Tyson Ross**

One of the many hoops that a home buyer must jump through is the payment of "earnest money" to the home seller. In the real estate business, earnest money is the check or cash a buyer puts down to purchase a home at the time the contract is signed. In this age of 100 percent mortgages and seller paid closing costs the idea of having to put down earnest money on a house doesn't sit well with a lot of potential home buyers. The problem is many home buyers have a hard time finding the utility of allowing someone else to hold such a large chunk of their hard earned money until such time as the deal actually closes.

Part of the frustration stems from the fact that there is just no getting around earnest money. Every binding contract requires consideration, and a contract to buy a house is no exception. Earnest money is simply the best mechanism we've come up with to satisfy that fundamental rule of law. The rest of the frustration could revolve around the word "consideration." This is because the consideration a contract requires has a different meaning than the consideration given when you open a door for someone or when you say good morning to your neighbor. The latter examples are akin to good manners while the former generally requires cold hard cash.

Now that earnest money has been explained, how much is the right amount to pay? The usual complicated answer is "it depends," but today's market is less complicated thanks to current market conditions. Fortunately for home buyers the amount of earnest money required to purchase a home has dropped tremendously of late. Just two years ago, during the white heat of the seller's market that endured between 2001 and 2006, earnest money deposits were as high as 5 percent of the sales price or more. These large amounts were required to not only show the seller that a buyer was seriously interested but also to stave off other potential buyers waiting in line.

All that has changed today as we are now in a buyer's market where as little as \$500 or \$1,000 is acceptable. The feds know this to be true so it is not just coincidence that the 2008 Tax Rebate Stimulus Package will issue checks to qualified individuals for \$600, and \$1,200 to couples (if they have children, add \$300 per). This will be more than enough to provide millions of households with the pocket money needed to break through what has become a major hurdle for the average home buyer, earnest money. So think big when you open up your stimulus check from Uncle Sam this week because it just might be enough to put you in the house of your dreams.

Research Compiled by:Shannon Farr & Amanda Dillabough
Colin Baenziger & Associates



Section 10

William E. Schmeling

*Fernandina Beach
City Manager Candidate Report*

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Cover Letter and Resume

WILLIAM E. SCHMELING

15 Iroquois Road
Manasquan, New Jersey 08736
732-618-5574
WESchmeling52@gmail.com

133 Park Shores Circle, Unit 4E
Indian River Shores, Florida 32963

July 7, 2023

Recruit28@cb-asso.com

Re: Fernandina Beach City Manager

To whom it may concern:

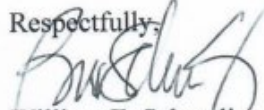
Attached is my resume for the position of City Manager in Fernandina Beach. I recently retired after over 25 years of public service in a variety of positions and locations. I retired on May 1, 2022 but my replacement quit within two weeks and I came back to work until a permanent replacement was found. This varied experience provides me with the ability to address the various issues that confront a city manager.

It was my practice to provide the governing board with a written report prior to meetings identifying issues and situations which I have dealt with or the governing board needs to be aware of. As a councilman, I wanted to know what was happening so that I could make an informed decision as well as provide my constituents with reasons why an action was taken or not taken.

During my 14+ years as an Executive Director, the sewer rate was increased only during my first year in charge in order to address issues that had been left unattended to because of a desire not to increase rates. During the remaining period, the entire plant was rehabilitated and refurbished, additional equipment and processes installed and our ocean outfall pipe was replaced.

I believe strongly in working with other government entities as it is difficult in today's world to be everything to everyone. It makes fiscal and economic sense to combine with other entities, even private companies, to reduce costs will still providing as good if not better services to the public.

While the units I have worked in were smaller, that is not a hinderance to working in a larger community. In a smaller unit, everyone is a department head so you are dealing with as many, if not more, department heads as a larger organization.

Respectfully,

William E. Schmeling

Encs.

WILLIAM E. SCHMELING
15 Iroquois Road
Manasquan, New Jersey 08736

(732) 618-5574 WESchmeling52@gmail.com
133 Park Shores Circle, E4
Indian River Shores, Florida 32963

RELEVANT EXPERIENCE

Executive Director

April 2008 – December 2022

Township of Ocean Sewerage Authority

In charge of day-to-day administrative and financial operations of 7.5 mgd secondary treatment plant; make recommendations on personnel, policies and procedures to 5-Member Board and carry out directives; prepare budget and handle financial matters; review, approve and prepare all Purchase Orders; prepare bid specifications and bid documents; work with Authority Engineer, Authority General Counsel and Authority Bond Counsel on bond proposals, the most recent being a \$10 million proposal to replace a portion of the Authority's ocean outfall pipe; prepare resolutions and agenda for meetings.

Qualified Purchasing Agent,

Borough of Bradley Beach

January 2013 - December 2017

Prepare bid specifications and bid documents after consultation with department heads on requested equipment, improvements and services; answer general purchasing questions as submitted by the administrative staff.

Zoning Officer

January 2009 – June 2015

Borough of Hightstown

Review and approve or disapprove zoning permit submissions; make recommendations to Planning Board on zoning ordinance amendments; revise Zoning Permit Application; prepare Sign Permit Application; Portable Sign Permit Renewal Application and related documents.

Borough Administrator

May 2003 – May 2008

Borough of Helmetta

Borough Administrator/Zoning Officer

June 2006 – May 2008

Borough of Roosevelt

Responsible for Borough's day-to-day operations; responsible for recommendations to Borough Council on hiring and firing of employees; handle negotiations with personnel on salary, terms and conditions of employment; prepare municipal budget; prepare resolutions and ordinances; temporarily served as purchasing agent, zoning officer and water/sewer revenue collector in Helmetta; serve as insurance commissioner; developed employee handbook and procedure manual; revised budget reporting process; implemented employee evaluations; contact person for complaints; interact with Borough engineer and attorney; prepare county, state and federal grant applications individually and with Borough engineer; served as deputy municipal clerk in Helmetta; worked on recodification of ordinances in Helmetta.

EDUCATION

MBA - Owen Graduate School of Management, Vanderbilt University
JD – Vanderbilt University
BS (Psychology) – St. John's University (Minnesota)

AFFILIATIONS

Committeeman, Manasquan Borough Council, January 1993 to December 2004
Chairman, Law and Ordinance Committee (six years)
Chairman, Administration and Finance Committee (five years)
Chairman, Personnel Committee (1 year, Committee then abolished)
President of Council, 1997, 1999, 2002, 2004

Commissioner, South Monmouth Regional Sewerage Authority, February 2000 to February 2005, February 2010 to January 2013
Chairman, Finance Committee (four years)
Chairman, Human Resources Committee (1 year)
Treasurer, 2004

Member, Manasquan Planning Board, 1990 to April 2005
Chairman, 1991 and 1992

Trustee, Visiting Nurse Association of Central Jersey, October 2004 to February 2006

Trustee, Coastal Habitat for Humanity Board of Trustees, February 2005 to June 2006
Member, Coastal Habitat for Humanity Construction Committee, 2001 to October 2006

Trustee, FoodBank of Monmouth and Ocean Counties Board of Trustees, 1992 to 2001
President, 2000 and 2001

Candidate Introduction

WILLIAM E. SCHMELING

EDUCATION

Juris Doctor, Vanderbilt University Law School

Master of Business Administration, Owen Graduate School of Business, Vanderbilt University

Bachelor of Arts (Psychology), St. John's University (Minnesota)

EXPERIENCE

Executive Director, Township of Ocean Sewerage Authority, Ocean, NJ	2008 – 2022
Qualified Purchasing Agent, Borough of Bradley Beach, Bradley Beach, NJ	2013 – 2017
Zoning Officer, Borough of Hightstown, Hightstown, NJ	2007 – 2016
Borough Administrator, Borough of Helmetta, Helmetta, NJ	2003 – 2008
Borough Administrator, Borough of Roosevelt, Roosevelt, NJ	2006 – 2008
Construction Management	2002 – 2003
Director of Administration, Gray*Star, Mount Arlington, NJ	1999 – 2002
Executive Vice President, Orchard Crest, Wall, NJ	1991 – 1999
Various law firms	1981 – 1991

BACKGROUND

The Township of Ocean Sewerage Authority maintains the sewer conveyance system in the Township of Ocean and provides treatment services to the Township, the Borough of Allenhurst, the Borough of Deal, the Borough of Interlaken and the Village of Loch Arbour. Ocean Township's population is 30,000 and the service communities add another 8,000 residents to the service area population during the summer season. The Township has a major regional mall and several active commercial districts within the Township, it does not contain any industrial uses. The service communities comprise primarily residential properties with small business districts in Allenhurst and Deal.

The 2023 budget anticipated revenue and expenditures of \$7,298,588 of which \$1,966,764 represented Debt Service and \$103,442 transferred to Asset Management Reserves. The debt service represents the rehabilitation and replacement of three pump stations to be done in 2023 and payments on previous capital projects including without limitation, replacement of 1,000 feet of ocean outfall pipe (\$10,000,000 bond issue), replacement of the Authority's largest pump station (\$4,600,000 bond issue), installation of various improvements within the treatment plant and the installation of a new odor control unit. The 2022 budget anticipated revenue and expenditures of \$7,323,670 of which \$1,875,863 represented Debt Service and \$315,000 transferred to Asset Management Reserves.

WILLIAM E. SCHMELING

Major issues facing the Authority during my final years were:

- 1) Replacement of all or part of the ocean outfall pipe as repairs have become more common place, and the State pushed the Authority to eliminate the release of effluent from the outfall pipe. As part of the replacement issue was the question of what type of material should be used, whether the new pipe or portion thereof should be reinforced concrete consistent with the existing pipe or HDPE pipe or other new material.
- 2) Upgrading the collection system throughout the Township to reduce infiltration and inflow. Previous administrations failed to address regular maintenance of the collection system which resulted in significant areas of the system requiring repair, rehabilitation or replacement. The Authority has several large mixed commercial/residential and residential projects which have been approved by the Township Planning Board. The Authority is rated for 7.5 mgd per day but during heavy rain events or rain events consisting of several days, the flow approaches 20 mgd or more per day.
- 3) Replacing old, outdated drywell/wet well pump stations. These pump stations are inefficient and require significant maintenance which also leads to safety concerns for employees entering the drywell portion of the pump station.

GENERAL MANAGEMENT STYLE AND EXPERIENCE

My goal in every community was to leave it in a better position than when I started, and to instill a professional demeanor in dealing with the issues. I do this by setting a good example by arriving early for work and not leaving early, not taking excess days off. I treat all employees the same regardless of their position or their abilities and if it is necessary to address work behavior, it is done on a personal basis and not in a manner to belittle the employee in front of his contemporaries. Another way is to provide written notice to all employees of an action that needs either to be taken or should not be taken so the person that it is directed at is not singled out.

My managerial style is to provide support to my employees with firm and clear direction of what is expected of them in their position. I do not stand over them or micro-manage work because I do not expect that to happen to me from my board members or commissioners. I make it a point to talk to as many employees during a week as possible to find out not only what is happening with work but also if there is anything, good or bad, happening in their personal life. I find that employees appreciate being looked at as more than a cog in the wheel at work and they are willing to work with me on things that may be slightly beyond their strict role in the company. I encourage all employees to increase their knowledge of their job through seminars, classes or other training situations. This is especially important in those positions which require licenses, certifications or the like.

WILLIAM E. SCHMELING

When dealing with employees, I do not pretend to know it all and try and learn what their job entails, what they need to do their job better and how I can help. By treating employees as a person rather than a number, I have found an employee is more likely to accept the sanction. For important decisions affecting the work force, I seek input from the employees that I know are the formal or informal spokesperson for the employees. Just as employees appreciate being treated as a person, they appreciate the opportunity to provide input in major decisions since they deal with the outcome of the decisions daily.

As a councilman for twelve years, I know there is nothing worse than being approached by a resident and being questioned about something happening in the town of which you have no idea. As a result, I prepare a report for the commissioners detailing actions that have taken place to deal with issues addressed at the last meeting, background information on issues to be addressed at the upcoming meeting and general information on events that have taken place in the community or among the employees. If there is an issue that needs to be addressed at an upcoming meeting, my report will provide background information on the pros and cons of possible decisions and my recommendation. Regardless of whether my recommendation is accepted, I understand that it is my responsibility to carry out the decision of the commissioners. If an issue develops between meetings that needs immediate attention, I contact all commissioners to advise them of the issue and to the extent permitted by law, obtain direction as to the action to be taken to address the issue.

I have always had a strong and positive relationship with my commissioners. I feel they would describe me as an effective leader, knowledgeable, practical, dedicated and fair. They have always appreciated my recommendations; they know that if they ask for my opinion on an issue, I will give them a straightforward answer. My staff appreciate the ease with which they can bring issues, big or small, and my willingness to discuss how to deal with them. They know that I will take their concerns seriously and if brought to the commissioners, I will present it fairly and completely on their behalf. Finally, the staff appreciates the support and recognition I give them for their accomplishments. Both commissioners and staff appreciate my direct, problem-solving approach rather than letting issues fester and grow larger.

My greatest strength is looking at a problem and finding a practical solution. In identifying a solution, I look at all the possible solutions, determine the effect of implementing the solution and finalize the solution based on how completely it addresses the problem. An example was my recommendation to change the way excess flow sent for treatment from our largest service community was calculated. The existing agreement provided for a set annual excess flow calculation based on a fixed gallon per day per building unit. For the Authority's treatment plant, yearly flow is not an issue, but daily flow can be an issue. The yearly approach was made worse by the fact that the service community's population is not consistent year around, but it increases significantly in the summer months. I proposed that rather than a year allowance a daily allowance be calculated and excess flow would be calculated on a daily basis and charged accordingly. The resulting new agreement implemented a daily ceiling to determine excess flow, which increased revenue for the Authority.

WILLIAM E. SCHMELING

My main weakness, as I expect it is for many managers, is getting too close to employees so they are given the benefit of the doubt in certain situations. I realize this and so while I still work on developing a personal relationship with employees, I remind myself there are rules and they need to be followed but necessarily in black and white depending on the specific situation.

Besides the change in determining excess flow calculation, my best achievements at the Authority were the implementation of an Asset Management Program and removing capital revenue sources from operating revenue. The Asset Management Program was instituted to provide for funds to address capital projects that are too small to be addressed in a bond ordinance but too large to be included in the operating budget. The Program had over \$1,000,000 in available funds at the end of 2022. When I first started at the Authority, connection fees were included in determining operating revenue. Connection fees are based on capital improvements made by the Authority, and it seemed wrong to include them in determining operating revenue, especially because they cannot be determined with any precision on a year-to-year basis. This results in distorted revenue projections on a yearly basis. The connection fees have been a main source of funds for the Asset Management Program and the Authority's Reserve for Rate Stabilization (used to address unanticipated operating expenses).

My biggest failure in my career was having my law license suspended. I was the executor of an estate and felt that I could also handle the legal work in order to save the estate money; I only charged the executor fees. In the end, it was more than I could handle, and it resulted in losing my license for three years. What I learned is that you cannot do everything, and you must realize what you can do and when you need to delegate responsibilities to others.

As to disciplinary actions, I fired an employee years ago when she came to work inebriated. I discussed the situation with her and how she could not operate as a design consultant and meet with customers in that condition, and I felt that she had been in this condition on previous occasions but never was able to prove it. Because of the way I approached her about the situation, she accepted my actions without any trouble and left work. I recently had to suspend an employee for three months and take away three months on the Authority's step program because he tested positive for drugs during a drug test. The disciplinary action was met with understanding by the employee because we talked about it and what its effect was on the Authority. Since we had talked about things outside of work, I feel that this helped make the action more acceptable to the employee.

Based on my conversation with a friend who now lives in Fernandina Beach, there are two overarching challenges, which have many subsets, facing the new City manager. One is how to deal with future development at the Port and the city-owned property that may or may not be condemned to further development. A second is how to keep the character that brought residents to Fernandina Beach while addressing the growth that the City has undergone recently and continues to undergo. With this issue is how to maintain, improve and provide the infrastructure to handle the growth without placing an undue burden on the residents. I am familiar with the problems that come with addressing the need for a refurbished or new City Hall. While a

WILLIAM E. SCHMELING

councilman, I was on the committee tasked with finding a location for a new municipal building or rehabilitate the existing building. Rehabilitation was impractical and the recommendation was to purchase an existing bank building in town and build a second story which houses most of the municipal operations that could not be accommodated on the first floor. My approach has been to improve infrastructure sooner rather than later because it does not get cheaper, and an infrastructure failure results in a huge, unnecessary expense.

If hired as the next City Manager, my first six months would be spent meeting with the commissioners and department heads to learn what each of them feels is good, bad, needs to be improved and consolidate them into a “to do” list with priorities. Beside the “to do” list, I would look for the Commissioners to provide me with goals and objectives they all agree on so I work plan can be developed and implemented. Next, I would meet with the appropriate officials and support staff to determine costs so a long-range program can be prepared to determine how the costs will affect future budgets and to start determining how to raise the necessary funds. I would review the employee handbook and rules and regulations to understand the culture the City has established for its employees. I would introduce myself to the appropriate union representatives and review the existing union contracts. I would hope to meet with employees in the general flow of business rather than go out of my way to meet them. I would meet with committees and boards of the City to learn what they are working on and may need help with. I would spend time reviewing previous budgets and audits and meet with the City’s auditor to discuss the current financial situation and future projections and possible issues that will need to be addressed.

My interaction with the media is very limited but I would compare it to dealing with Open Public Records Act requests. I do not anticipate any issue dealing with the media as I would not hide anything that should be public because that just invites more trouble than addressing the question in the beginning. I would not propose to be the primary contact for media involvement unless directed so by the Mayor and Commissioners.

As mentioned above, I had my law license suspended and that could be embarrassing. I would note that I was elected twice to the Manasquan Council after this action and started my governmental career after that. I would expect no reaction from my community if I am a finalist.

Social media can be used to keep residents informed of infrastructure work that may affect them, of City events and opportunities and weather-related warnings. If not in place, I would establish a site where residents could provide their email to receive City news. I have not used social media at any of my positions.

In my spare time, I referee soccer, work on my house, my kids’ houses and my mother-in-law’s house. Any time I can go to the beach, I am there reading a book.

WILLIAM E. SCHMELING

SIX ADJECTIVES OR PHRASES I WOULD USE TO DESCRIBE MYSELF

Problem Solver
Practical
Prepared
Knowledgeable
Approachable
Open-minded

REASONS FOR DEPARTING CURRENT POSITION

I retired December 31, 2022 and spent the last six months redoing a house for my mother-in-law. I know that once that is finished, I am going to find it difficult to fill my time. I enjoy work and my attendance record proves that. I do not golf, boat, hunt, play tennis and I can only spend so much time at the beach.

CURRENT/MOST RECENT SALARY

My final compensation at the Township of Ocean Sewerage Authority was \$130,000 with paid health and dental insurance.

Section 10

CB&A Background Checks

**Background Check Summary for
WILLIAM "BILL" ELMER SCHMELING**

Criminal Records Checks:

Nationwide Criminal Records Search	No Records Found
County	
Monmouth County, NJ	No Records Found
Indian River County, FL	No Records Found
Mercer County, NJ	No Records Found
Middlesex County, NJ	No Records Found
State	
New Jersey	No Records Found
Florida	No Records Found

Civil Records Checks:

County	
Monmouth County, NJ	No Records Found
Indian River County, FL	No Records Found
Mercer County, NJ	No Records Found
Middlesex County, NJ	No Records Found
Federal	
New Jersey	No Records Found
Florida	No Records Found

Motor Vehicle

New Jersey	No Records Found
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Credit

Excellent

Personal Bankruptcy

No Records Found

Sex Offender Registry

Not Listed

Education

Confirmed

Employment

Confirmed

Social Media

Nothing of Concern Found

**Background Check Summary for
WILLIAM “BILL” ELMER SCHMELING**

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

**Background Check Summary for
WILLIAM "BILL" ELMER SCHMELING
Personal Disclosure**

Personal Disclosure Questionnaire

Name of Applicant: William E Schmeling

The following questions are designed so that we will be able to make full disclosure to our client concerning your background. Please answer them honestly. Cutting corners or misrepresenting your past will result in you being eliminated from all further searches conducted by this firm. We understand that frivolous charges are sometimes made and that charges do not mean you were guilty. We also understand that you may have been wronged and needed to seek compensation. The bottom line is that we want to be certain that our client is fully informed. If you have any questions, please contact us for clarification.

Please explain any yes answers on a separate sheet of paper.

1. Have you ever been charged or convicted of a felony?
Yes ☐ No ☒ x
2. Have you ever been accused of or have been involved in a domestic violence or abuse incident?
Yes ☐ No ☒ x
3. Have you ever declared bankruptcy or been an owner in a business that did so?
Yes ☐ No ☒ x
4. Have you ever been the subject of a civil rights violation complaint that was investigated or resulted in a lawsuit?
Yes ☐ No ☒ x
5. Have you ever been the subject of a sexual harassment complaint that was investigated or resulted in a lawsuit?
Yes ☐ No ☒ x
6. Have you ever been charged with driving while intoxicated?
Yes ☐ No ☒ x
7. Have you ever sued a current or former employer?
Yes ☐ No ☒ x
8. Please list links to all your social media accounts (Facebook / Instagram / LinkedIn / Twitter, etc.) and your personal web page if you have one.
Facebook, possibly LinkedIn and Twitter although I have not posted or visited in many years.
9. Is there anything else in your background that, if made public, would cause you, our client or our firm embarrassment if it came to light through the press or any other mechanism?
Yes ☒ x My law license was suspended in February 1999 for three years, and I did not seek to reinstate it
10. Please provide a list of any lawsuits in which you are or have been a party either as plaintiff or defendant.
In re Estate of William R. Jube

Attested to: _____

William E Schmeling
Signature of Applicant

Please email this form via PDF DOCUMENT to Monique@cb-asso.com or via fax to
(561) 621-5965 no later than 5:00 PM MST 07/17/2023.

**Background Check Summary for
WILLIAM “BILL” ELMER SCHMELING
Personal Disclosure Explanation**

From: **William Schmeling** <weschmeling52@gmail.com>
Subject: Re: Fernandina Beach documents
To: Monique Rogers <monique@cb-asso.com>

Monique:

I was the Executor of an estate and thought I would save the estate money by also acting as the attorney and not hire one. In the end I failed to set up a trust for a beneficiary and provide an accounting in a timely fashion. No money was missing, and I did not take excessive executor commissions. Required tax returns were filed. However, I was lax in responding to the beneficiaries and failed to set up the trust.

Bill

Sent from my iPhone

CB&A Reference Notes

Reference Notes
William “Bill” Schmeling

Charles Theodora Jr. – Board Member, Ocean Sewerage Authority, NJ 908-558-0327

Mr. Theodora has known Mr. Schmeling since around 2012. Mr. Schmeling was going to retire so they hired his replacement and he worked with her until she felt comfortable in the role. He retired and three months later she resigned with a three-day notice. They called to ask if he could help them with a few things and he said he would be there in a few days. He came back to work, and once again, he stayed on until the new Director was hired and comfortable in the role. He did not ask, or even want, anything from them. He just wanted to help them.

The individual that Mr. Schmeling hired to replace him was fantastic and they wish she were still there. His other hires were very good as well. His decisions are good. He kept everything in order and shared information in a way they could understand. He knew where every nickel was and how it was going to be used.

Mr. Schmeling was innovative, and he liked to try new things. If the idea worked, they continued with it. Otherwise, he went back to the status quo. He was always trying to improve operations and be more cost effective. When the Board asked him to do something they often expected it to take him a few days, or a few weeks, to get to it. However, he generally responded the same day and provided a full report the next day.

Mr. Schmeling was not asked to be out in the community, but constituents came to him with questions and issues. Everyone loved him, he worked extremely well with them. He emailed almost every day to keep the Board informed, and then followed up with a full report in detail. When something happened that was going to cost money or create problems, he emailed immediately whether it was day or night. The message could be as simple as “We had a collapse in the road, will discuss more at the meeting.”, but they were always informed.

A pipeline that went through an easement was compromised when the road collapsed. Mr. Schmeling was on site and spoke with the individuals who had previously worked on that easement. He went with their recommendations because he realized that they had more experience and knowledge of the pipeline than he did. He let those who had the experience take the reins. In every emergency he remained the calmest one in the room.

If Mr. Theodora had to give his life savings to one person to manage, it would be Mr. Schmeling. Not only is he excellent at managing funds, but he also does what is right for the person or organization.

Mr. Schmeling has not been involved in any controversy on a personal or professional level. Mr. Theodora never had an argument or issue with Mr. Schmeling or his work.

Mr. Theodora would hire Mr. Schmeling back right now if he could. He will walk into the job and those who work with him will be able to sleep at night. Anyone who has the opportunity to hire Mr. Schmeling should hurry up and do so.

Reference Notes
William “Bill” Schmeling

Words or phrases used to describe Bill Schmeling:

- Calm,
- Leader,
- Detail oriented,
- Eager to try new things to save money or be more efficient, and
- Excels at finance.

Strengths: Leadership, very calm leader but everyone knows he is the boss when he walks into the room.

Weaknesses: None identified.

Dennis Galvin – Board Member, Ocean Sewerage Authority, NJ 732-614-4500

Mr. Galvin has known Mr. Schmeling since around 2012. Mr. Schmeling oversaw the budgets and made sure they were adhered to. He was very hands-on because the organization was small. He managed around 15 personnel and dealt with permits and maintenance.

Conducting the initial interviews, Mr. Schmeling made good decisions when hiring personnel. The Committee also interviewed prospective employees to provide input. Mr. Schmeling was up for reappointment every single year, and he was always reappointed without question, which indicates that his decisions are good.

When the public attended Board meetings, Mr. Schmeling responded to their requests and worked well with them. He interacted very well with the Mayor, Council, and Township Administrator. He kept everyone informed through email or text and was responsible for preparing monthly meeting packages.

During a sewer main break Mr. Schmeling coordinated the response from the staff and the outside contractors. He stayed a step ahead the entire time. He was very timely in completing his work. In challenging circumstances, he was pretty low key and never appeared to be stressed.

Mr. Schmeling has not been involved in anything controversial. He retired from the Authority. Good leaders are not liked by everyone, because not everyone will agree with the decisions that are made. However, Mr. Galvin could not name anyone in particular who would disagree with this reference.

Mr. Galvin would hire Mr. Schmeling. He stayed calm with the public even when they were aggressive. He is even keeled and always responds with the answer that is requested.

Reference Notes
William “Bill” Schmeling

Words or phrases used to describe Bill Schmeling:

- Dedicated,
- Honest, and
- Concerned about employees.

Strengths: Budget preparation, his great ability to resolve problems before they became issues including personnel issues.

Weaknesses: He was a good administrator. That said, he did not have a technical understanding of the plant and the processes. When staff members wanted to purchase new equipment, he did not know if the purchase was necessary. Fortunately, they had some savvy staff members and some good business and technical oriented individuals on the Board who ran interference on these purchases.

Vinnie D’Esposito – Operations Supervisor, Ocean Sewerage Authority, NJ 732-567-1460

Mr. D’Esposito has known Mr. Schmeling since 2007. Mr. Schmeling was very good at his job, and he was very efficient. He was straight forward and to the point, which was appreciated.

When hiring or in making decisions in general, Mr. Schmeling did well. He maintains operations at a high-performance level. He always kept the employees informed.

Mr. Schmeling went with the staff to speak to residents, particularly when they were working on the sewer in their neighborhoods. He was very helpful to everyone who had questions and interacted very well with them.

Mr. Schmeling was a leader, he reported to the executive committee every month. When a major sewer line collapsed on Labor Day, he was at the site organizing the personnel and equipment. He ensured that staff had the resources they needed to fix the line.

A man who wore many hats, Mr. Schmeling was their Executive Director, Finance Director, and he handled Human Resources. He was in the office every day and rarely took time off. He is very mild mannered and handled the most difficult situations very well.

Mr. D’Esposito is not aware of anything negative involving Mr. Schmeling. Mr. D’Esposito has never heard anything negative about Mr. Schmeling. Mr. Schmeling retired from the Authority. Mr. D’Esposito does not know anyone who would disagree with the statements in this reference.

Mr. D’Esposito would hire Mr. Schmeling. He is a good person, and they never had any issues with him or his job performance. He has been a city manager before and would do well in that role again.

Reference Notes
William “Bill” Schmeling

Words or phrases used to describe Bill Schmeling:

- Mild mannered,
- Efficient,
- Well spoken,
- Educated, and
- Great communicator.

Strengths: Excellent at the finance aspect of the job, good people skills, good communicator, good leader.

Weaknesses: None identified.

David Kaplan – Auditor, Ocean Township, NJ 732-241-1632

Mr. Kaplan has known Mr. Schmeling since around 2012. He was essentially thrown into a situation where he had to do basically everything, much more than a normal Executive Director for an Authority that size. He stepped up and did it well.

Mr. Schmeling always provided what was needed for the audits and the process went well. He was very responsive compared to the others who Mr. Kaplan works with. Mr. Schmeling was a pleasure to work with.

While Mr. Kaplan does not recall off the top of his head if there were any findings on their audits, he does remember that he never modified an opinion.

Mr. Schmeling had to step into an accounting role that was not his responsibility, but he managed it to the best of his ability and did well enough for them to get through the audit.

Mr. Kaplan enjoyed working with Mr. Schmeling. He did more in finance than most Executive Directors would ever attempt, and he did it well.

Strengths: Always there when he was supposed to be there, provided information on a timely basis, nice personality, professional.

Weaknesses: None identified.

Reference Notes
William “Bill” Schmeling

Brian Valentino – Board Member, Ocean Sewerage Authority, NJ 732-904-2953

Mr. Valentino has known Mr. Schmeling since 2022. While Mr. Valentino was not thrilled with Mr. Schmeling’s technical competency or strategic planning, he was very good administratively and managed finance and administration very well. His decisions were acceptably good.

Mr. Schmeling communicated within the parameters that had been established for him. He was timely in completing assignments.

While Mr. Valentino has a positive opinion of Mr. Schmeling, he would not hire Mr. Schmeling. Mr. Schmeling is a nice person who is phenomenal at managing an organization, but he is not the type of person who would show the flag for the town or spearhead initiatives.

Words or phrases used to describe Bill Schmeling:

- Laid back,
- Self-confident, and
- Pleasant.

Strengths: Excellent at managing finances and administration, nice person.

Weaknesses: Technical competency and strategic planning.

Donna Campagna – Administrator, Allenhurst Borough, NJ 732-531-2757

Ms. Campagna worked with Mr. Schmeling from around 2016 until 2022. The Allenhurst Borough contracts with the Ocean Sewerage Authority for services. Ms. Campagna always had good dealings with Mr. Schmeling. He was pleasant, informative, and helpful.

Mr. Schmeling made good decisions. He was easy to work with. He communicated well and kept others informed.

The Borough wanted a quote from the Ocean Township to take over billing so that the Borough did not have to be involved in any aspect of the sewer operations. While they did not ever come to an agreement, the cost was more than the Borough wanted to pay, Mr. Schmeling was very instrumental in the process.

Ms. Campagna is not aware of anything in Mr. Schmeling’s background or conduct that would concern a reasonable person or an employer.

Ms. Campagna would hire Mr. Schmeling; he managed Tosa for quite some time which is not a small operation.

Reference Notes
William “Bill” Schmeling

Words or phrases used to describe Bill Schmeling:

- Communication,
- Helpful,
- Friendly,
- Easy to work with, and
- Polite.

Strengths: Always readily available and easy to communicate with.

Weaknesses: None identified.

John Bonello – Township Attorney, Ocean Township, NJ 732-728-1300 732-245-1224

Mr. Bonello was not willing to provide a full reference interview for Mr. Schmeling. However, he found Mr. Schmeling to be very good, competent, and a great person.

Prepared by: Lynelle Klein
Colin Baenziger & Associates

CB&A Internet Research

**Internet – Newspaper Archives Searches
William Elmer Schmeling
(Articles are in reverse chronological order)**

[CB&A Note: Only the information relevant to **William E. Schmeling** is listed below.]

<https://www.tosa-nj.org/2020%20meetings/2-4-20TOSAreorg.pdf>
February 4, 2020

TOWNSHIP OF OCEAN SEWERAGE AUTHORITY REGULAR MEETING

Others Attending:
Director **Bill Schmeling**,

Chairman Galvin called the meeting to order. All recited The Pledge of Allegiance. Chairman Galvin announced that the Meeting was being held in conformance with the Open Public Meetings Act of 1975 and that adequate notice had been duly posted where required and mailed to the Asbury Park Press and The Coaster in accordance with law.

Mr. Galvin advised that this was the annual Reorganization Meeting of the Township of Ocean Sewerage Authority and asked Executive Director **Schmeling** to act as Temporary Chairman.

ANNUAL REORGANIZATION SESSION

Director **Schmeling** opened the Annual Reorganization Meeting and acted as Temporary Chairman. He called for nominations for the office of Chairman. Mr. Theodora nominated Dennis Galvin for the office of Chairman. Mr. Stubbs seconded the nomination.

20-11

AUTHORIZING APPOINTMENT OF PUBLIC AGENCY COMPLIANCE OFFICER FOR 2020

WHEREAS, the State of New Jersey Department of the Treasury Affirmative Action Office mandates the appointment of a Public Agency Compliance Officer annually; and

WHEREAS, **William E. Schmeling** currently serves as Public Agency Compliance Officer.

NOW, THEREFORE, BE IT RESOLVED that the Township of Ocean Sewerage Authority hereby appointments **William E. Schmeling** as the Authority's Public Agency Compliance Officer for the year 2020.

20 - 12

DESIGNATING NEW JERSEY UTILITY AUTHORITIES JOINT INSURANCE FUND COMMISSIONER FOR 2020

BE IT RESOLVED that the Township of Ocean Sewerage Authority that Executive Director **William E. Schmeling** is hereby designated as the Authority's Fund Commissioner to the New Jersey Utilities Authority Joint Insurance Fund for 2020.

20 - 13

**Internet – Newspaper Archives Searches
William Elmer Schmeling
(Articles are in reverse chronological order)**

AUTHORIZING APPROVAL OF PETTY CASH FUND AND NAMING CUSTODIAN OF PETTY CASH FUND

WHEREAS, N.J.S.A. 40A:5-21 authorizes the establishment of a Petty Cash Fund and the custodian of the Petty Cash Fund; and

WHEREAS, the Petty Cash Fund should be authorized annually.

NOW, THEREFORE, BE IT RESOLVED that the Township of Ocean Sewerage Authority authorizes approval of its Petty Cash Fund in the amount of \$50.00 for 2020; and

BE IT FURTHER RESOLVED that the Township of Ocean Sewerage Authority authorizes **William E. Schmeling** to serve as Petty Cash Fund custodian.

20 - 23

AUTHORIZING ADOPTION OF CASH MANAGEMENT PLAN AND DESIGNATION OF AUTHORIZED DEPOSITORIES

NOW, THEREFORE, BE IT RESOLVED by the Township of Ocean Sewerage Authority that the following serve as the Cash Management Plan of the Township of Ocean Sewerage Authority for 2020:

1. The Executive Director is directed to use this Cash Management Plan as the guide in depositing and investing the Authority's funds.
2. The following are objectives of the Cash Management Plan:
 - a. Preservation of capital.
 - b. Adequate safekeeping of assets.
 - c. Maintenance of liquidity to meet operating needs.
 - d. Investment of assets in accordance with State and Federal laws and regulations.
3. The following are suitable and authorized investments:
 - a. Interest-bearing bank accounts and certificates of deposit in authorized banks (GUDPA-approved) listed below for the deposit of local unit funds.
 - b. Government money market mutual funds, which comply with N.J.S.A. 40A:5-15.1(e).
 - c. Local government investment pools which comply with N.J.S.A. 40A:5-15.1(e) and conditions set by the Division of Local Government Services.
 - d. New Jersey Cash Management Fund.
 - e. Repurchase agreements of fully collateralized securities, which comply with N.J.S.A. 40A:5-15.1(a).
 - f. Notes, bonds or other obligations of the United States of America or obligations guaranteed by the United States of America that matures within three hundred ninety-seven (397) days from the date of purchase, and has a fixed rate of interest not dependent on any index or external factors.
 - g. Any federal agency or instrumentality obligation authorized by Congress that

**Internet – Newspaper Archives Searches
William Elmer Schmeling
(Articles are in reverse chronological order)**

matures within three hundred ninety-seven (397) days from the date of purchase, and has a fixed rate of interest not dependent on any index or external factors.

h. Bonds, notes or other obligations, having a maturity date not exceeding three hundred ninety-seven (397) days, approved by the Division of Local Government Services for investments by local units (municipalities, counties and fire districts).

i. Bonds, notes or other obligations approved by the Division of Local Government Services for investments by local units (municipalities, counties and fire districts).

4. The Executive Director shall prepare monthly a schedule of investments purchased and redeemed, investment earnings, fees incurred and market value of all investments.

5. The Executive Director shall report to the Authority Members any accounts not earning interest.

20 - 24

AUTHORIZING REMOVAL OF SERVICE CHARGE ACCOUNTS OF \$10.00 OR LESS
WHEREAS, the Township of Ocean Sewerage Authority has determined that it is appropriate to remove all open Service Charge Accounts of Ten Dollars (\$10.00) or less from the list of accounts certified annually to the Township of Ocean Tax Collector.

NOW, THEREFORE, BE IT RESOLVED by the Township of Ocean Sewerage Authority that the Executive Director is hereby authorized to remove all open Service Charge February 4, 2020

Accounts of Ten Dollars (\$10.00) or less, together with an excess due the Township of Ocean Tax Collector, from the annual certified list of outstanding accounts; and

BE IT FURTHER RESOLVED that the Executive Director be authorized to execute any further documents or instruments necessary to affect this Resolution.

WORK SESSION

Executive Director's Report The Executive Director advised the members that with regard to the onshore section of the outfall pipe air release repair, the proposal for this work was over \$700,000. The Chairman asked Mr. **Schmeling** to find out specifically what type of pipe was used in that section.

There was some discussion with regard to the Director's report.

Mr. **Schmeling** advised that he received a few communications, one of which was from Don Brockel requesting information about some testing at Deal Lake. The Director advised that there were one or two spots where there was some E.coli. There was some discussion about dye testing in those areas.

Mr. **Schmeling** provided a review of the resolutions on the agenda, and there was some

Internet – Newspaper Archives Searches
William Elmer Schmeling
(Articles are in reverse chronological order)

discussion relative to the bill list.

Internet – Newspaper Archives Searches
William Elmer Schmeling
(Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **William E. Schmeling** is listed below.]

<https://www.aeanj.org/wp-content/uploads/AEA-2018-Member-Directory.pdf>
2018

2018 Membership Directory
47 Years of Environmental Progress

Association of Environmental Authorities

Member Organization Contacts
William E. Schmeling

Member Organization: Authorities
TOWNSHIP OF OCEAN SEWERAGE AUTHORITY
224 Roosevelt Avenue
Oakhurst, NJ 07755
William E. Schmeling, Executive Director
(732) 531-2213, ext. 110
Fax: (732) 517-0695
Email: ExecutiveDirector@tosa-nj.org
Website: www.tosa-nj.org
Five Commissioners
Monmouth County

Operates a 7.5 mgd pure oxygen-activated sludge wastewater treatment plant; collection system of 170 miles, 11 pumping stations; staff of 17, non-union; serves Allenhurst, Deal, Interlaken, Loch Arbour, and Ocean Township.

Internet – Newspaper Archives Searches
William Elmer Schmeling
(Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **William E. Schmeling** is listed below.]

https://www.bradleybeachnj.gov/wp-content/uploads/2022/04/2015_final_report.pdf
December 31, 2015

BOROUGH OF BRADLEY BEACH
ROSTER OF OFFICIALS

Other Officials

William Schmeling, Qualified Purchasing Agent

**Internet – Newspaper Archives Searches
William Elmer Schmeling
(Articles are in reverse chronological order)**

[CB&A Note: Only the information relevant to **William E. Schmeling** is listed below.]

<http://www.oceantwp.org/filestorage/10184/10186/10190/10207/8-4-15.pdf>
August 4, 2015

TOWNSHIP OF OCEAN SEWERAGE AUTHORITY REGULAR MEETING

Others:

Executive Director **Bill Schmeling**,

WORK SESSION

Executive Director's Report. The Director said that CME will drop off the final plans for the Logan Road collection project and he will review the plans prior to going out to bid. He noted that the ongoing examination of the lines with the camera truck revealed additional areas that need repair. A list of these areas will be sent to Mark Wozczak with the request that he provide estimates for this work. One of the major problem areas is Colonial Terrace with approximately 4,000 feet of pipe that needs to be lined or replaced. This work may be considered as part of the next NJEIT project.

He noted that there is a resolution on the agenda authorizing the execution of an agreement with the Borough of Deal for provision of sewer services by TOSA. Mr. **Schmeling** said that Frank Vacchiano advised that Deal brought in 350 gallons of rag material for the month of July and Deal is working to reduce the amount of rag material before it reaches TOSA.

Director **Schmeling** provided an update on the wye replacement project for the ocean outfall line. Chairman Galvin suggested that TOSA have an inspector present on the boat when the final inspection is done.

Attorney's Report. Mr. Bonello reported that he reviewed most of the items that are in the Director's report and said that he had no additional comments.

Director **Schmeling** reported that he received communications requesting additional information with regard to the HomeServe mailing that offered residents the opportunity to obtain insurance covering their sewer lines.

Resolution

Mr. Stubbs offered the following resolution and moved its adoption. Mr. Theodora seconded the motion.

**Internet – Newspaper Archives Searches
William Elmer Schmeling
(Articles are in reverse chronological order)**

[CB&A Note: Only the information relevant to **William E. Schmeling** is listed below.]

http://oceantwp.org/filestorage/10184/10186/10192/10246/2-4-14_reorganization_min.pdf
February 4, 2014

**TOWNSHIP OF OCEAN SEWERAGE AUTHORITY
REGULAR MEETING
Oakhurst, NJ**

Others:
Executive Director **William Schmeling**,

BE IT FURTHER RESOLVED that the Township of Ocean Sewerage Authority authorizes **William E. Schmeling** to serve as Petty Cash Fund custodian.

WORK SESSION

Executive Director's Report. Mr. **Schmeling** provided a written report, and provided members with additional information as well. He advised that the commercial account billings have gone out and he is getting some questions on that.

He noted that two members of the Hillel School Board of Directors were present at the meeting. Mr. Darrin Shabot introduced himself and advised that he is the Director of Buildings and Grounds. Also present was the Director of Finance. Mr. Shabot told the members that they are concerned about the amount of their current bill. Mr. Bonello advised that he has met with Mr. Shabot to discuss the billing. At this point he is not ready to give any recommendation on this matter and asked the Board to hold it for discussion at the next meeting after an investigation into this billing issue is made.

There was some discussion on the outfall pipe and location of the manhole. Mr. **Schmeling** noted that according to information provided by Jason Burke, a contractor who performed some work for an adjacent property owner, the manhole is buried in sand and completely sealed. It will cost approximately \$1,900 to locate and dig up the manhole and reopen it. Burke would do the work and the cost will be included with the outfall pipe inspection work.

The Executive Director reported that he went to the Deal Lake Commission about the outfall pipe. He advised that the existing outfall is still there and that the line from Loch Arbor feeding the station was exposed during low levels.

Operator's Report. Mr. Meholic was absent from the meeting due to illness. Mr. **Schmeling** advised that there was no additional information relative to the report.

Mr. **Schmeling** provided a review of the Resolutions on the agenda.

AUTHORIZING WILLIAM E. SCHMELING TO ACT AS AUTHORIZED

Internet – Newspaper Archives Searches
William Elmer Schmeling
(Articles are in reverse chronological order)

REPRESENTATIVE FOR NJEIT PROJECT NUMBER S340750-12

WHEREAS, the Township of Ocean Sewerage Authority intends to file an application with the New Jersey Department of Environmental Protection and the New Jersey Environmental Infrastructure Trust Fund for the Reconstruction of the Interlaken Pump Station and the Replacement of the Bulkhead.

NOW, THEREFORE, BE IT RESOLVED that the Township of Ocean Sewerage Authority hereby authorizes **William E. Schmeling**, Executive Director, (contact information: 224 Roosevelt Avenue, Oakhurst, New Jersey 07755; 732-531-2213, ext 110) to act as the Authorized Representative to represent the Township of Ocean Sewerage Authority in all matters relating to the project undertaken pursuant to the above referenced New Jersey Environmental Infrastructure Loan to be executed with the New Jersey Department of Environmental Protection and the New Jersey Environmental Infrastructure Trust.

**Internet – Newspaper Archives Searches
William Elmer Schmeling
(Articles are in reverse chronological order)**

[CB&A Note: Only the information relevant to **William E. Schmeling** is listed below.]

<http://www.oceantwp.org/filestorage/10184/10186/10196/10304/5-1-12min.pdf>
May 1, 2012

TOWNSHIP OF OCEAN SEWERAGE AUTHORITY REGULAR MEETING

Others:

Executive Director **Bill Schmeling**,

Director's Report Mr. **Schmeling** reported that proposals were received from the engineering firms regarding the Interlaken pump station evaluation. He recommended that the members review the proposals before taking any action.

He noted that he provided to the members a copy of a resume from an individual who is interested in an internship. She would be interested in working in the lab. Mr. **Schmeling** recommends that the Authority consider an internship program.

The Executive Director advised that there is a resolution on the agenda authorizing joining the New Jersey Sustainable Energy Joint Meeting. He noted that there is no guarantee that TOSA would be accepted into the program.

He provided members with copies of information relative to odor control. He previously had spoken with some companies relative to bio filters. One party just sent a proposal, a copy of which was provided to members. Mr. **Schmeling** advised that this system could possibly be in place by July. There was discussion about the process and the costs as well as the possibility of TOSA staff installing the bio filters. Mr. Galvin described the method that could be utilized by staff to do this so that the odor problem could be addressed before the summer season. Mr. Bonello advised that the project would require a design plan. Mr. Johnson also recommended that the plan be engineered to make certain that it would work correctly. Chairman Villapiano asked that Mr. **Schmeling** contact Greeley and Hansen to tell them about this concept and try to get the project done as quickly as possible. Mr. Bonello advised that the work could be done as an emergency project. This would require a letter and a resolution stating that it is an emergency situation.

Attorney's Report. Mr. Bonello reported that he has finished the searches for the siphon project. He advised that the town owns the land between the road and the water. In addition he has identified the owners of the property where the drill will be placed. He will send a letter to the owners. Mr. **Schmeling** advised that the TWA permits should be received this month.

BUSINESS SESSION

Mr. **Schmeling** provided a review of the Resolutions on the agenda.

Communications

Internet – Newspaper Archives Searches
William Elmer Schmeling
(Articles are in reverse chronological order)

Mr. **Schmeling** advised that the only communication received was from the individual interested in an internship.

BE IT FURTHER RESOLVED that the Chairman and Secretary are authorized to execute the Joint Contract Joiner Agreement, a sample of which is attached, and that **William E. Schmeling** is hereby designated to represent the Authority as a member of the State Management Committee of the NJSEM; and

BE IT FURTHER RESOLVED that the Chairman, Secretary and Executive Director are authorized and directed to execute such other documents signifying the Authority's membership in the NJSEM; and

BE IT FURTHER RESOLVED that payment of the Initial Membership Fee of One Hundred Fifty Dollars (\$150.00) as required by the NJSEM's Bylaws is authorized and directed to be delivered to the Executive Director of the NJSEM.

Internet – Newspaper Archives Searches
William Elmer Schmeling
(Articles are in reverse chronological order)

Star-Ledger, The (Newark, NJ)
February 27, 2008

Council plans end to police chief post - Helmetta's top cop fights demotion

Author/Byline: Tom Haydon

A plan to restructure the Helmetta police department by demoting the current chief, hiring a civilian police director and ending Jamesburg overnight policing of the borough is expected to be proposed tonight during the borough council meeting, officials said.

The move to demote Chief Cully Lewis comes while he is away on his honeymoon and would violate tenure protections Cully has as chief, according to his attorney, Steve Mannion of Teaneck. "They can't remove him and they can't demote him," Mannion said. Lewis hired Mannion this year because the borough has refused to negotiate a new contract with Lewis since the last one expired in December 2006, Mannion said.

Currently, the borough's 38 streets are patrolled by three full-time officers, including the chief, a sergeant and a patrolman, and four part-time special officers between 6:30 a.m. and 10:30 p.m. The nearby Jamesburg Police Department handles emergency overnight calls through a shared-services agreement that expires in March. Councilman Peter Karczewski said the borough may make the special officers full-time patrolmen to provide around-the-clock police coverage by Helmetta officers without a need to rely on Jamesburg overnight.

The proposed restructuring comes three months after a study of the Helmetta police by an outside consultant found the force "extremely deficient in several key areas" and sharply criticized the department's chain of command. "The efficiency study brought several problems to the forefront that we feel needed to be address immediately," said Karczewski, who serves on the borough public safety committee. "We want to get the police department up to where it should be, or if not fully, than 80 percent or 70 percent."

Borough attorney David Clark said the council is considering hiring a full-time public safety director who would also act as borough administrator. The current part-time administrator, **William Schmeling**, would be given different part-time managerial duties, he said. The ordinance to create the position of public safety director and eliminate the post of police chief is expected to be introduced at tonight's borough council meeting.

Karczewski said the borough has already picked a candidate for public safety director, someone he would only identify as a former police chief from northern New Jersey. Mannion said Lewis was never informed of the restructuring plans. Lewis was married last weekend and is on vacation, he said. Karczewski said the council considered rescheduling introduction of the ordinance, but heard that Lewis, while on vacation, would be available.

Lewis currently earns \$72,041, which is less than the \$73,840 paid to his sergeant, Mannion said. He said the borough, to comply with an ordinance that requires the chief have a higher salary,

Internet – Newspaper Archives Searches
William Elmer Schmeling
(Articles are in reverse chronological order)

has agreed increase Lewis' salary to \$73,841, \$1 more than the sergeant. About a week ago, Mannion said he rejected a borough suggestion that Lewis take a position as sergeant. "I will have to look at the ordinance and take what action is appropriate," Mannion said.

The Middlesex County Association of Chiefs of Police yesterday announced its opposition to the plan. South Brunswick Police Chief Raymond Hayducka, who is vice president of the chiefs association, said the organization wants to keep the chief position because only a sworn officer may make patrol assignments, conduct investigations or review internal affairs records. "We are concerned about maintaining the chief's position," Hayducka said. "It's only fair."

**Internet – Newspaper Archives Searches
William Elmer Schmeling
(Articles are in reverse chronological order)**

[CB&A Note: Only the information relevant to **William E. Schmeling** is listed below.]

<https://www.yumpu.com/en/document/read/9644413/kirk-rothfuss-joins-council-as-it-reorganizes-zuckerman-mark>

Bulletin
February 2008

Kirk Rothfuss Joins Council as It Reorganizes; Mayor and Council Members Deplore Vandalism at FDR Memorial and Laud Citizen who Paid for Repairs
Author: Michael Ticktin

While most appointments were unchanged, Mayor Beth Battel did make several changes in the composition of the Planning Board. The Mayor appoints all members of the Planning Board, without any vote by the Council, except for her own position on the Board (Class I), which she holds *ex officio*, and the Council (Class III) member, who is elected by the Council, a position to which Councilwoman Arlene Stinson was re-elected. Administrator and Zoning Officer **Bill Schmeling** was appointed as Class II (Public Official) member, replacing Michael Ticktin, who was appointed as Class I alternate, meaning that he only votes in the absence of the Mayor. Tim Hartley and Jim Alt, who had served as alternate members of the Board, were appointed as Class IV (Public) members, replacing Lou Esakoff and Ralph Seligman. Mr. Seligman was named as an alternate member, as was June Ord. At the subsequent Planning Board meeting, Jane Rothfuss was re-elected as Chairwoman, Jim Alt was elected as Vice-Chairman, and Ann Kassahun was re-elected as Secretary.

Internet – Newspaper Archives Searches
William Elmer Schmeling
(Articles are in reverse chronological order)

<https://archive.centraljersey.com/2007/10/04/lawsuit-names-individuals-including-father-and-son/>

Central Jersey Archives
October 4, 2007

Lawsuit names individuals, including father and son

Author: Jane Meggitt

The lawsuit recently filed by the local synagogue and yeshiva alleges that the borough and certain residents want to run them out of town. Filed by Congregation Anshei Roosevelt and Yeshiva Me'on Hatorah on Aug. 27 in the U.S. District Court for the District of New Jersey, the lawsuit names the Planning Board, Zoning Board, mayor and Borough Council, Roosevelt Preservation Association (RPA), Jeff Ellentuck, Peggy Malkin, Steven Yeger, Jane Rothfuss, Allison Petrilla and James Alt as defendants. Ellentuck and Malkin are members of the Borough Council, while Yeger, Rothfuss, Petrilla and Alt serve on the Planning Board.

The lawsuit aims to appeal a Planning Board resolution that reversed a decision by the borough's zoning officer that allowed the establishment of the yeshiva at Congregation Anshei Roosevelt's Homestead Lane synagogue property. All of the Planning Board defendants named in the lawsuit voted July 24 for the reversal of the zoning officer's decision.

Along with seeking a reversal of the board's July 24 decision, the plaintiffs seek monetary damages and other relief against a number of the defendants for violating the plaintiffs' civil rights under the Religious Land Use and Institutionalized Persons Act of 2000, the First and 14th Amendments of the U.S. Constitution, the New Jersey Constitution, and the New Jersey Law Against Discrimination, according to the lawsuit.

The lawsuit names RPA as a second party defendant, with Roosevelt resident Bert Ellentuck, who is Jeff Ellentuck's father, as its designated agent, because the association filed the appeal with the Planning Board seeking the reversal of the zoning officer's decision.

In a Sept. 7, 2005, letter to the zoning officer, Bert Ellentuck, who lives next door to the synagogue property, complained that the synagogue property was being used in violation of borough ordinance. According to the lawsuit, he claimed there is no provision for a private school in the district either as a principal or conditional use. The zoning officer then performed an inspection of the property and determined, after consultation with then-Borough Attorney Ira Karasick, that the property's use is not in violation of the ordinance, according to the lawsuit.

The lawsuit alleges that Bert Ellentuck, individually and through the RPA, "mobilized support among other borough residents for opposition to the yeshiva." The plaintiffs have further alleged that the RPA perpetuated "an atmosphere of intolerance" in the town toward Orthodox Jews. The lawsuit further alleges that Jeff Ellentuck and Malkin are both members of the RPA as well as

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William Elmer Schmeling
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council members. With regard to the allegation, Jeff Ellentuck said, “I am not now nor have I ever been a member of the RPA.” Malkin could not be reached for comment prior to press time. According to the lawsuit, the yeshiva presented “uncontroverted evidence” at various Planning Board hearings held in 2005 and 2006 as to what constitutes a house of worship in the Jewish faith. The lawsuit alleges that the board violated New Jersey decisional law in making its determination as to what constitutes a Jewish house of worship rather than recognizing that it must defer to the doctrines of each faith as to what constitutes a house of worship for such faith.

The lawsuit states that despite not having testimony to refute the yeshiva’s expert witness, Rabbi Zevulun Charlop, as to what constitutes a house of worship in the Jewish faith, the Planning Board July 24 memorialized its decision that the yeshiva is not operating in accordance with borough ordinances.

The synagogue and the yeshiva are alleging that the board’s decision relied on residential activities conducted on other properties in the borough that were not the subject of the proceedings before the board. “The borough and the Planning Board, spurred on by the RPA, have made it their unspoken mandate to run plaintiffs out of town,” the lawsuit alleges.

Congregation Anshei Roosevelt is described in the lawsuit as a New Jersey nonprofit with its principal office at 20 Homestead Lane and a purpose to provide a house of worship and study, consistent with the tenets of the Jewish religion. Yeshiva Me’on Hatorah is described as having its offices at 18 Homestead Lane and a purpose to teach and provide the means for students to study the Torah, the Talmud and other Jewish religious writings.

The lawsuit notes that Roosevelt is the only municipality in the state with a synagogue as its only house of worship. The synagogue, built in 1955, has had a decline in membership in recent years and has had difficulty at times getting together the necessary quorum of 10 men to conduct a prayer ceremony or service. “To revive and sustain the congregation, the [synagogue’s] Board of Trustees agreed to enter into a lease agreement with the yeshiva to operate and conduct religious and secular educational studies at the property,” the lawsuit states. “In exchange for use of the facility, the rabbis associated with the yeshiva are to provide rabbinical services to the congregation.”

The first class of students began attending the yeshiva in September 2005. In the lawsuit, the synagogue and the yeshiva allege that “certain borough residents vehemently opposed the yeshiva operating from the synagogue premises, claiming that the borough lacked the physical and financial resources to absorb the yeshiva.”

The lawsuit also notes that Jeff Ellentuck was a spokesman for the committee organized in town that spearheaded the recall of former mayor Neil Marko. Marko, a yeshiva supporter, was voted out of office in a 2006 recall election and the synagogue and yeshiva have alleged that his vocal support for the yeshiva was the sole reason for his removal.

Internet – Newspaper Archives Searches
William Elmer Schmeling
(Articles are in reverse chronological order)

Borough Administrator **William Schmeling** said the town has not yet filed its response to lawsuit.

Internet – Newspaper Archives Searches
William Elmer Schmeling
(Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **William E. Schmeling** is listed below.]

<https://archive.centraljersey.com/2007/04/12/roosevelt-mayor-carries-on-monmouth-horse-tradition/>

Centraljersey.com
April 12, 2007

Roosevelt mayor carries on Monmouth horse tradition

Author: Jane Meggitt

Millstone Township Mayor Nancy Grbelja has pleasure horses and is involved in standardbred racing. Upper Freehold Mayor Steve Fleischacker lives on a farm where his father-in-law raises harness racing horses. But, unlike the other two leaders, only Roosevelt Mayor Elsbeth “Beth” Battel actually earns her living from horses.

Even though she spent the winter on Florida’s premier horse show circuit, Battel didn’t shirk her civic duties. She flew back and forth for Planning Board and Borough Council meetings and also remained available to her constituents via cell phone and e-mail. She said she couldn’t have done it without good help, both in town and at her barn. She commended Municipal Clerk Krystyna Olejnik and Borough Administrator **William Schmeling** for their efforts while she was away.

Internet – Newspaper Archives Searches
William Elmer Schmeling
(Articles are in reverse chronological order)

<https://www.theyeshivaworld.com/news/uncategorized/3756/roosevelt-mayor-in-hot-seat-for-backing-yeshiva.html>
November 16, 2006

Roosevelt Mayor in hot seat for backing Yeshiva

Author: Unknown

For more than a year now, the Roosevelt (N.J.) Yeshiva located in the Shul on Homestead Lane has been a hot-button issue. The Borough Council discussed the controversial topic at its Nov. 6 meeting. The yeshiva signed a four-year lease last year with Congregation Anshei Roosevelt for use of the Shul property. Yeshiva classes began for a group of first-year students in September 2005. This September, the yeshiva added another class of students, bringing the total to 34. In October 2005, former Zoning Officer Bob Francis reported that he did not find the yeshiva in violation of any borough ordinances. When he inspected the school, it had 12 students, he said, and there was no residential use of the synagogue or the parsonage house on the property. In September, the borough's Planning Board overturned Francis' decision that the local yeshiva was not violating borough ordinances. At the Nov. 6 council meeting, council members complained that Borough Attorney Ira Karasick has not acted on the Planning Board's decision.

Borough Administrator **William Schmeling** said he had spoken with Karasick, who said he had to put paperwork together before taking action on the Planning Board's decision. **Schmeling** also said Karasick has claimed that he did not receive an official resolution from the Planning Board. Councilwoman Peggy Malkin responded that Karasick had been directed to act on the matter many weeks ago.

Later on in the meeting, former Mayor Neil Marko, a yeshiva supporter whom borough residents recalled in a special February election, took issue with what the current mayor wrote in the borough's newsletter regarding the yeshiva issue. In the Borough Bulletin, Mayor Beth Battel wrote that the Borough Council held a special meeting on Sept. 26 to authorize the spending of \$10,000 on special legal counsel in the constitutional law field to "better position ourselves to protect and defend our town and all of our citizens' constitutional rights."

In the article, Battel continued, "The Constitution grants everyone equal protection under the law, regardless of religion. Through this vote, the council stated emphatically that no citizen should be deprived of their constitutional rights by any citizen or group claiming superiority, and that no local government – no matter how small – should sacrifice their citizens' rights to any person or group of persons claiming superior rights." Marko asked Battel what she meant by a group claiming superiority. Battel said she was referring to any group that thought its rights were above the law. "We have laws," she said, "and if a group came in that thought they were immune – that is what I'm referring to." Marko said Battel should state what particular group the borough is trying to defend itself from. When Marko asked Battel which constitutional rights have been challenged, Councilman Jeff Ellentuck said that the council would discuss the issue in closed session.

Internet – Newspaper Archives Searches
William Elmer Schmeling
(Articles are in reverse chronological order)

Star-Ledger, The (Newark, NJ)
October 2, 2004

Helmetta officials uncertain on cause of flooding

Author/Byline: Patrick Jenkins

A 12-inch storm drain main collapsed in Helmetta during Wednesday's heavy rainfall, but borough officials are not sure if that caused or just contributed to the flooding that forced the evacuation of 60 homes. "We did have a main collapse but we're not sure what caused it, or if it caused the problem. There were a lot of factors involved," Borough Administrator **William Schmeling** said yesterday. The area where the drain collapsed is near the intersection of John Street and Brookside Place behind the old Helme snuff factory. "We're working on repairing that in case it rains this weekend," he said.

Some 60 homes on John Street and Railroad Avenue just south of the old factory on Main Street were evacuated during the day Wednesday as rising waters flooded basements and crawl spaces. **Schmeling** said no estimate of damages was compiled by yesterday, adding the tiny borough where officials serve part time is trying to help residents continue to clean up and repair the collapsed main. "We're getting the homeowners taken care of first and then we'll try to see what that cost was and what it cost the borough. "After that, next week we'll sit down with the county to see if we can find out what could have accounted for this. I'm sure there are a lot of factors," **Schmeling** said.

The neighborhood where Helmetta flooded is designated a 100-year flood zone by the Federal Emergency Management Administration. It is located at the southeast end of Helmetta Pond, a former cranberry bog in Jamesburg Park. Middlesex County officials said heavy rains flooded the pond and surrounding wetlands, and that, in turn, overwhelmed Helmetta's storm drain system there.

Residents said the area flooded once before, in 1994, and also affected their basements. Many residents lost furnaces and water heaters that were in their basements, and almost all lost their electrical service when the floodwaters came up. Utility crews have been working to restore service and repair appliances since.

Internet – Newspaper Archives Searches
William Elmer Schmeling
(Articles are in reverse chronological order)

[CB&A Note: Only the information relevant to **William E. Schmeling** is listed below.]

Star-Ledger, The (Newark, NJ)
May 25, 2004

Some relief in districts where budgets lost - Helmetta council, fearing a big increase in school spending next year, raises it this year

Author/Byline: Chandra M. Hatslett

Voters who rejected their school district's spending plan last month will see an average decrease of nearly five tax points for the upcoming school year. Eight of 24 school budgets in Middlesex County failed on April 20. When a school budget fails, town officials make cuts. If the board of education doesn't agree with the cuts, it can appeal to the state Department of Education. Districts had until May 19 to certify the tax levy.

Helmetta voters surprisingly rejected their budget, even though it was the only district in the county to propose a school tax rate decrease, from \$4.50 per \$100 of assessed valuation to \$3.73. Now, the borough council has increased the budget, rather than cut it. "The council was concerned that if (the tax rate) went down 77 cents this year, it would go up next year. They were looking to balance it," said Helmetta Borough Business Administrator **Bill Schmeling**.

So, instead of a 77-cent decrease per \$100 of assessed value, voters will see a 69-cent cut in their school tax rate. The council added \$51,116 to the budget to pay for an additional special education student, **Schmeling** said, bringing the school tax rate to \$4.42. Taxpayers in Carteret will save 11 tax points after the borough council cut \$1.1 million from the \$21.2 million tax levy. While the levy was reduced, only \$579,000 was cut. The other \$521,000 was taken from the district's surplus, said Mayor Daniel Reiman.

The council cut \$200,000 from health insurance benefits because renewal rates were greater than projected; \$40,000 was cut from additional compensation for teachers, \$30,000 was cut from supplies and \$20,000 from maintenance. "We didn't cut anything that affected teacher salaries, instruction or students," Reiman said. With the cuts, homeowners will now pay \$2.21 per \$100 of assessed valuation, rather than the proposed \$2.32. County Superintendent of Schools Patrick Piegari cut \$500,000 from Carteret's original \$44 million spending plan before it went to voters because the school board could not agree on the budget.

Internet – Newspaper Archives Searches
William Elmer Schmeling
(Articles are in reverse chronological order)

Star-Ledger, The (Newark, NJ)
February 22, 2004

Vanishing pond gets a reprieve

Author/Byline: Patrick Jenkins

Charles Breitweiser is fighting nature, but he's got an uphill battle. A fisherman who used to ply the banks of Helmetta Pond, Breitweiser wants someone to reverse the natural demise of the 30-acre tarn. Located in the Jamesburg County Park Conservation Area, a 1,700-acre Middlesex County park that stretches over parts of Helmetta, East Brunswick and Spotswood, the pond traditionally had drawn fishermen to its banks in quest for pickerel and bass.

Not lately. "There aren't any fish," said Breitweiser. "The aquatic vegetation has killed them." The pond is eutrophying, a natural process that eventually will turn the body of water into a swamp, then a meadow.

County officials were inclined to let nature take its course, but agreed last year to clear a small portion of the southern end of the pond - where Helmetta built a playground, gazebo, boat ramp, and fishing pier with a \$150,000 grant from the county. Last year, the county hired Aquatic Analysts Inc. of Middletown to clear about 1.5 acres of vegetation from the pond's bottom.

Larry Kover, the Sussex County-based firm's president, said they used an Aquamog SRX-109 clamshell rake to do the job. The machine is a bargelike float that can pick up a 2,000 pound log as well as remove aquatic vegetation by the roots, along with organic material attached to the roots. "Before we cleared it, it was totally clogged with vegetation," Kover said. "We targeted lily pads and some of the invasive species, such as cabomba, an exotic species from Europe that has infested our lakes, and pulled them out by the roots. Once we take them out of the ecosystem, it's gone. You get long-term control."

But even using county trucks and work crews to transport the debris from the pond to the county compost site in North Brunswick, it cost \$18,600 to clear just the 1.5 acres, said Ralph Albanir, director of Parks and Recreation for Middlesex County. "We're going to see how it goes, see how long it lasts. We'd like to do some more, possibly get some grants and do it on a piecemeal basis, but it is expensive," he said. Albanir is looking at the pond with an open mind, given the constraints the county is under. "We can't dredge it, but we would like to keep it as healthy as we can for as long as we can," Albanir said.

Breitweiser, however, said with the looming redevelopment of the Helmetta snuff factory complex near the pond, it would make sense to try to preserve the pond, rather than let it transform into a "stinky and mosquito-infested swamp." "This lake has not gone so far it can't be brought back at a reasonable cost," said Breitweiser, an East Brunswick resident who lives near the pond. "If it's kept a pleasant fishing pond for local people, it makes their property more valuable. If it turns into swamp, what will that do to their property values?" he asked.

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William Elmer Schmeling
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Jeff Squire of 13 John St. has no doubts at all about what he wants for the pond. "I don't want to see a swamp. My yard butts up against it. We've got those two things on Mars looking at dust. Why not take care of the things around here first? "Yeah, I'd spend some extra taxes on that," Squire said.

Joe Scotto, working in his father's Helmetta Pizza Grill on Main Street, right across from the factory complex, also wants the pond saved. "With the rebuilding, I'd rather see that. If they're going to rehabilitate the (snuff) factory and bring all those new people in, why let it become a swamp?" Scotto asked.

The borough is considering three redevelopment proposals at the snuff factory, a process expected to take another couple of months, at least. The development proposals call for a mix of residential and retail uses. Borough Administrator **William Schmeling** said it was too soon to tell just what the economic impact of the factory's revitalization would be on Helmetta, but its environmental impact on the pond would be a major factor. "It's not in the borough's interest to let it become a swamp, so one of the considerations will be the redevelopment's impact on the pond, given its proximity," he said. "That would be a concern with any large land development, especially given new regulations from the state about storm runoff," **Schmeling** said. The fact that it's such a large body of water means there will be expenses in maintaining it, he said, adding, "We'll probably have to work with the county to keep it a lake."

Mayor Nancy Martin agreed, saying it is something all residents want, but it is too expensive for any of the municipalities to undertake alone. "Right now, the redevelopment has been our priority but we will look to address this in the future," she said, adding some kind of permanent funding source will have to be found.

Neil Picurro of Monroe has a small boat that he would like to bring to the pond. "I hope to get in the water and fish for pickerel and bass," Picurro said. "I think the county should spend whatever it has to on maintenance. You don't need a swamp around here," Picurro said.

Internet – Newspaper Archives Searches
William Elmer Schmeling
(Articles are in reverse chronological order)

Star-Ledger, The (Newark, NJ)
February 19, 2004

Helmetta redevelopment raises fears - Residents voice worries about rise in traffic, school enrollment

Author/Byline: Beth Kressel

Helmetta residents expressed concern about traffic and an increase in schoolchildren at the first of three public hearings on converting the 14-acre Helme Mill factory site and surrounding land into a commercial and residential downtown area. The borough council designated about 24 acres, including the 14-acre Helme Mill factory site, as a redevelopment area in October 2002, said Borough Administrator **Bill Schmeling**.

Last night, the public heard from Edgewood Properties representatives who said their firm envisioned a mix of residential and commercial space and open land spread throughout the redevelopment area along Main and Maple streets. Edgewood attorney Howard Apgar said preliminary plans include 40,000 to 50,000 square feet of retail space, 300 to 400 condominium units and 20 to 30 townhouses.

Residents said they could not imagine that their tiny borough could handle the traffic created by extra businesses and homes. "There's been a lot of talk about traffic," said Sewell Peckham, a member of the citizens' redevelopment advisory committee. "I live about two houses away from where the project is going, and there's no way I see 400 cars in this area."

Joanne Carroll of John Street, also a committee member, said that the possible rental units might attract more families with schoolchildren and that Helmetta would have to shoulder the cost of their education. "We have already got a problem with other rental properties in town," she said after the meeting.

Edgewood's director of engineering, Ron Aulenbach, said it was too early to determine whether all or any of the original Helme Mill buildings could be preserved. "Edgewood properties would obviously like to salvage as much of the buildings as possible, however I can't stand up here and say, 'I'm going to save the buildings,'" Aulenbach said.

Tomorrow night, the public can attend the second public meeting at the Holy Trinity Church parish building on Main Street to hear the redevelopment proposal by Helmetta Lenape, the developer who owns the Helme Mill factory site, **Schmeling** said.

On Friday, Kaplan & Co. will make its presentation at the final public hearing. After that the council will meet with the citizens redevelopment advisory committee, said **Schmeling**, to discuss the proposals.

Internet – Newspaper Archives Searches
William Elmer Schmeling
(Articles are in reverse chronological order)

Sentinel-EBS News
January 29, 2004

Martin says quest continues to find savings in budget

Author: Tara Petersen

HELMETTA — Nancy Martin says she has cut costs by thousands of dollars since becoming mayor just four weeks ago. According to Martin, changes in borough employee salaries and positions have resulted in a \$13,359 savings, which in this borough amounts to a municipal tax rate savings of 2 cents for each \$100 of assessed valuation on a home.

About \$6,000 of expenditures equals 1 cent on the tax rate, according to Borough Business Administrator **Bill Schmeling**.

Helmetta residents have seen municipal taxes increase by more than 24 cents, and overall property taxes — mostly comprised of the school tax — rise by more than \$2 since 2000, **Schmeling** said. Taxes increased overall from \$5.01 to \$6.37 per \$100 of assessed valuation from 2001 to 2002 alone, he said.

Martin, elected on the independent People's Voice ticket to succeed former Mayor Frank Hague, said she wanted to try to cut costs wherever she could while making sure services to residents were not compromised. The largest cost reduction came through the consolidation of the purchasing position from two employees to one, Martin said. The result saved the borough \$8,500. Almost \$5,000 in savings came from replacing Brian Mitchell's positions with three interim employees. Mitchell, who resigned earlier this month, was paid \$21,872 as the construction control clerk, plumbing and building subcode official, and the construction and zoning official. The three new officials make a combined income of \$17,000, Martin said. Alex Tucciarone is now the interim official for plumbing, and Cheryl Dougherty is the interim construction control clerk. Robert Simonelli has replaced Mitchell in his other capacities.

Martin said another \$3,200 was saved when professionals such as the borough engineer and auditor agreed to cuts, and through the appointment of a new borough attorney, Thomas Roselli. Roselli replaced longtime attorney Gary Schwartz. This savings, however, was canceled out by additional costs associated with hiring two new tax collectors — one certified and one uncertified. Martin, who formerly served as the borough's tax collector, said replacing herself is costing the borough about \$3,200 more since a certified person is required for some duties.

The borough has hired Jamesburg Business Administrator Denise Jawidzik to act as the certified tax collector part-time while the uncertified employee trains and obtains full certification. "It usually takes about two years to become certified," Martin said. "Then we will be able to save \$3,000 because the borough will no longer need [Jawidzik]." Martin said she was disappointed that she was unable to save an additional \$1,200 when the Planning Board voted 5-2 against her selection for Planning Board attorney. "I attempted to change the Planning Board attorney but it was voted down," Martin said.

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William Elmer Schmeling
(Articles are in reverse chronological order)

Martin said she also hopes to find other areas for cost savings. "We're hoping to not do any bonding this year," Martin said. She added that she is working with the finance committee and borough professionals in reviewing old ordinances to "find other ways to cut costs without affecting services. "We're looking to see if all the money [set aside for certain purposes] has been spent, and if there is money left over we will use it for improvements so we won't incur additional costs," Martin said.

Martin also said she hopes to make improvements to the municipal building so that the upstairs, which was once leased to the Middlesex County Board of Health for \$25,535 annually, can be rented again. "We're hoping to get an elevator and make some room for recreation upstairs, too," Martin said. Martin said that an elevator is required if the public would be going to and from offices on the second floor.

Martin said she is still moving forward with plans for the redevelopment of the snuff mill property so the borough can create a major source of tax revenue. "We're still waiting to hear back from two of the developers so we can set up dates for [proposal] presentations," Martin said.

Internet – Newspaper Archives Searches
William Elmer Schmeling
(Articles are in reverse chronological order)

http://abnf.co/NJ-helme_tobacco_history.htm
Between 2003 and 2008

Helme Tobacco History

Author: Unknown

Developers can submit proposals later this month on redeveloping the snuff mill area. The Helmetta Borough Council voted unanimously at its Sept. 24 meeting to adopt a redevelopment plan for the former Helme Tobacco Co. property. The plan was drafted by a hired engineering firm and was recommended by the borough Planning Board earlier this summer. According to the engineering firm, Remington, Vernick and Vena of Toms River, a Request for Qualifications and Proposals, or RFQ&P, will be sent out to "invite the development community to submit qualifications packages and project concepts to transform the 31-acre abandoned mill property into a thriving mixed-use residential/ commercial center." Once developers submit their proposals, officials said, the council will have the authority to select a developer and a plan, regardless of the fact that the property is privately owned by a Bridgewater development firm. The proposals must be in by Nov. 14.

Many residents, who otherwise said they support redevelopment of the site, expressed objections to any redevelopment plan or zoning change that would allow housing that is not age restricted. Such residents said they fear an increase in public school students, which would ultimately increase property taxes. Planner Stuart Wiser addressed the issue during a June presentation of the redevelopment plan. Wiser said that it is best for the plan to remain flexible so that more developers would be interested and the borough can receive more options for redeveloping the mill area. He also said that the borough can negotiate with a developer to make sure that any added costs associated with more children would be covered. "It would be part of the negotiations with the hopeful developer," Wiser said. "We can say that the developer can pay 'x' (amount of money) per student. There are any number of creative ways to get there."

"It's been zoned (age restricted and light industrial) for 10 years, and you know how much interest we've had? Zero," Mayor Frank Hague said at last week's meeting. The redevelopment plan divides the property into five separately zoned parcels that encourage a mixed-use plan, Wiser said.

Parcel One, which is a 3-acre tract north of John Street and located close to Jamesburg County Park, should be preserved as open space, according to the plan adopted last week. A 1-acre area dubbed Parcel Two, near Brookside Place, should be designated for commercial use only. Parcels Three and Four, the locations of the two main high-rise factory buildings on the north side of Main Street — comprising 2.4 and 5.5 acres, respectively — would be zoned to allow both commercial and residential uses. Developers are strongly encouraged to renovate rather than demolish the main brick structures. Parcel Five, which spans about 4 acres and is located across Main Street from the other four properties, would be designated for "a mix of general retail and commercial office space," according to Wiser. Resident Tom Nugent contended that the property owner, Pizzo & Pizzo of Bridgewater, has a business association with Matrix

Internet – Newspaper Archives Searches
William Elmer Schmeling
(Articles are in reverse chronological order)

Development Corp., Cranbury, which in 2002 proposed a controversial plan for 294 luxury apartments. He was one of several residents who suggested that the council intends to allow Matrix to build there. Council President Andrew Tancredi assured the community that this was not true. "That's not going in there. Nobody wants that," he said. Hague said it would be "premature" to be concerned over the types of proposals that will be made, and which developers will make them, since the RFQ&Ps have not yet been released. "Premature around here is too late," Nugent said. Nugent, as well as others at the meeting, said the council needs to do a better job of keeping residents informed. Mayoral candidate Nancy Martin sent a flier to residents questioning the decision that a redevelopment advisory committee be made up mostly of Helmetta officials. "Why is (the mayor) handpicking the committee? Why can't the advisory committee consist of all residents?" the flier says. "What is really going on?"

Hague, who sits on the committee along with Tancredi, said the following borough officials are also members: Business Administrator **Bill Schmeling**, Planner Stuart Wiser, Attorney Gary Schwartz and Auditor Gary Stankewitz. Other members include Chris Volk, who is both the Planning Board co-chairman and president of the homeowners association for Heather Glenn, and Ron Wilson, the former Republican mayor and former Helme Tobacco Co. mill plant manager.

Hague said the advisory committee's function is to determine the qualifications of prospective developers by "making sure they have a background and the financial ability to complete the project." "There are hundreds of pages on the application. We need professionals to read through them" on behalf of the borough, he said. Hague called the flier "another way to attack me and my family. It's easy to come in and criticize, but we've accomplished a lot in this town. It blows my mind. She doesn't have the facts. "There are a certain number of people that are going to be against it no matter what. They are going to scare the developers away," he added. The mayor and council will ultimately select a developer and a project, Hague said, but members of the public are encouraged to come to council meetings to voice their opinions. "The developers (once narrowed down) will come forward and make presentations at the regular meetings. We are elected by the residents to make certain decisions. Their interest is being looked out for," Hague said. "Helmetta is getting a second chance with this project," he said. Councilman Edward Romano agreed that the council is very motivated to choose the best plan for the borough. "I don't want people stoning me when I walk around town because they don't like it," he said.

Research Compiled by: Shannon Farr
 Colin Baenziger & Associates



Section 11

W. Lee Smith

*Fernandina Beach
City Manager Candidate Report*

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Cover Letter and Resume



William "Lee" Smith, III

138 Cherryfield Lane
Savannah, GA 31419

Phone: 912-328-9492

Email: wlsmanager@outlook.com

June 26th, 2023

Colin Baenziger & Associates
2055 South Atlantic Avenue
Suite 504
Daytona Beach Shores, Florida 32118

RE: City Manager, Fernandina Beach, Florida

Mr. Baenziger,

I am writing to express my interest in the Fernandina Beach, Florida - City Manager position as shown on your website. My (35+) thirty-five plus years of solid experience in North Carolina and Georgia local governments and county management, coupled with my passion for city and county operations appear to align with every aspect of city services and operations such as finance, public works, emergency management, sanitation, recreation, community involvement, planning, zoning, water, sewer, drainage, capital construction management, etc. I have overseen staff levels from 200 to 2250 and I feel I am the perfect candidate for this position.

As my resume shows, I have been developing my skills as a local government manager over the past thirty-five years. My management and public skills are outstanding, as are my abilities to bring communities together. I have also demonstrated proficiency in Management, receiving my ICMA Credentialed Manager status years ago. I have developed and implemented 911/communication systems, major capital projects including but not limited to: roads, bridges, water, sewer, broadband, multi-purpose stadium, etc. All within or under budget. Have successfully developed a team concept for employees several times. Have major experience managing emergency events such as hurricanes with pre-planning and post storm management. It would be my pleasure to contribute similar results for Fernandina Beach.

I am very interested in joining the Fernandina Beach team and look forward to discussing the excellent opportunities Fernandina Beach has to offer. I look forward to an opportunity to be considered and hereby request the opportunity to interview and be considered for this position. I would be glad to talk or meet with you when appropriate.

Sincerely,

Lee Smith

William "Lee" Smith, III

WILLIAM "LEE" SMITH, III

138 Cherryfield Lane, Savannah GA 31419
912-328-9492 • wlsmanager@outlook.com

OBJECTIVE

To obtain a challenging leadership position applying creative problem solving and innovative management skills with a growing county, city & community to achieve optimum utilization of local resources along with my 35+ years of local government experience. Always keeping in mind "To leave where you are better than when you found it."

EXPERIENCE

County Manager

May 2014 to September 2022

Chatham County, Savannah, GA

Served as Chatham County Manager, Georgia. Served a nine-member board, responsible for 2,250+ employees, served a community with a population of approximately 300,000 people in the county and regionally over 500,000 people with an annual growth rate of 17%. Was responsible for a \$998 million budget, development of a "zero based" budget process, developed local policy and laws for the Board and carried out and implemented these activities per the Board's priorities and direction. Developed a professional executive team whereby departments were divided into groups for each deputy manager and myself within the organization for appropriate reporting and supervision of specific areas such as public works, law enforcement, building/safety, code enforcement, judicial, finance, etc.

I was successful in establishing a new county police department with the mindset of "real" community policing. Successfully consolidated communications/E-911 system that had operated individually under seven municipalities to one system. Managed several financial referendums for projects such as infrastructure, new trial courthouse, new state of the art emergency operations center and multiple major recreation facilities. Initiated a strategic planning process involving several thousand citizens which ultimately brought forth the "Chatham County Blueprint for the future." Stabilized the finances of the County which lead to a higher bond rating reducing financing costs of major capital projects.

Managed the development of the Chatham County SPLOST (Special Local Option Sales Tax) of \$400 million for roads, recreation, capital and infrastructure. Several of the projects are now under construction.

County Manager/Chief Executive Officer

December 2001 to February 2014

Wayne County, Goldsboro, NC

I was responsible for all aspects of operations and finances for Wayne County, NC. These responsibilities included but were not limited to: Budget development and presentation, financial planning, strategic community planning, development of a executive team to oversee day to day operations, answer to a seven member elected board, develop board policies and recommendations. Operations included: health and human services, finance, tax, emergency services, solid waste, sewer, law enforcement, etc. Developed the county's first capital improvement plan and was instrumental in developing a public-private economic development agency recruiting over 2000 jobs in five years. \$175 Million Annual Budget & 1100+ employees. Managed the re-organization of the local airport to an executive jetport and merged a regional public library system to a county department for better oversight. Managed the development of a county-wide digital communication system including all county operations and law enforcement and all municipalities. Implemented a new county-wide emergency medical system 24-hour paramedics from a

volunteer system at a cost reduction to taxpayers including a state-of-the-art E911 system.

County Manager

July 1993 to November 2001

Washington County, Plymouth, NC

Served as County Manager. Responsible for all aspects of operations and budget of \$12+ million annually, answered to a five-member board. Operation responsibilities included: budget development and oversight, tax, finance, health and human services, personnel, water, etc. Developed the county's water system to a true self-supporting enterprise, developed the county's first zoning ordinance, established the first county wide transportation system and served for several months as both county manager and hospital administrator while transitioning the local hospital to a private entity and first profit in 10 years.

Executive Director

December 1990 to June 1993

Columbus County Economic Development Commission, Whiteville, NC

As executive director was responsible for the recruitment and retention of all industry in the county as well as the development and oversight of an 1100-acre industrial park. This effort included: marketing for the county/city, extensive travel in the US and Europe. I was also responsible for the development of the first industrial park with all infrastructure including water, sewer, gas, rail, and interstate connection. This job created over 1,600 new jobs and millions of dollars in new tax base. I was also given the opportunity to manage a water bond referendum (successful) and project implementation.

Planner/Emergency Manager/Deputy Manager

March 1986 to November 1990

Pamlico County, Bayboro, NC

This position was responsible for: all emergency response (fire and rescue), preparedness, developed and implemented the county's first 911 system, community development including federal housing programs, tourism, zoning, mapping, etc.

EDUCATION

University of North Carolina at Wilmington, Wilmington, NC

1985 Bachelor of Science Business Administration (Cameron School of Business)

INTERESTS

Transportation - Involved in the development of a Highway 70 Corridor Commission to oversee the strategic corridor interstate project involving all of Eastern North Carolina including seven counties. The \$1.2 billion project was completed in 2015. Infrastructure - Heavily involved in regional water and sewer projects (infrastructure Summit 2008), etc. Actively involved in the Military Affairs Commission and Seymour Support Council for Seymour Johnson Air Force Base. Community - Have been majorly involved in Habitat for Humanity for over 20 years. The bulk of my time outside of the office is spent with my family and traveling. I am an avid gardener and wood worker and fly large kites at the beach on the weekends.

DISTINCTIONS

Recognized as County Manager of the Year for the Eastern Region in 2005 and Awarded Transportation Leadership Award in 2006. Certified/Accredited County Manager through ICMA since 2004. Chairman and Board member of the Year in 2012 by the North Carolina Mental Health Council. Received 30-year recognition as a member of ICMA. Manager of the Year 1999 by the Eastern NC Regional Commission.

PROFESSIONAL AFFILIATIONS

Developed the Chatham County "Calling All Manager's Group" including all local county city and county managers in the region of southeast Georgia and South Carolina. Previously an active member of the North Carolina City/County Manager's Association and ICMA and continue these activities in Georgia. Have served on several committees for the Georgia and North Carolina Association of County Commissioners including the NCPTS, Curriculum development and Productivity Awards Committee. Serve as the local Wayne County Development Alliance as Secretary/Treasurer, Wayne County Chamber Board of Directors, Downtown Goldsboro Development Commission, Wayne County Partnership for Children, Past Board of Director member of the Wayne County United Way. Chair of Eastpointe Mental Health MCO and Chairman of the North Carolina Department of Health and Human Services Mental Health Waiver Advisory Committee. Member/Secretary/Treasurer of the Highway 70 Corridor Commission. Have continued as a major advocate of mental health in the State of Georgia.

SALARY HISTORY

Chatham County - \$253,500 plus \$1200 car allowance per month all insurances paid by the county including family benefits, 401k max contribution, life insurance, employment contract with one yr. severance & fully vested retirement 4%.

Wayne County - \$215,500 plus \$1200 travel per month, individual/family insurance coverage, 401K, life insurance and employment contract.

Washington County - \$95,000 plus \$500 travel per month and employment contract. Columbus County - \$43,000 plus \$500 travel per month

Candidate Introduction

WILLIAM “LEE” SMITH, III

EDUCATION

University of North Carolina – Wilmington – BS – Business Administration – Cameron School of Business

ICMA – Certified Accredited Manager – 20 years

EXPERIENCE

Management Consultant	Jan. 2023 – present
County Manager, Chatham County, Savannah, GA	2014 – 2023
County Manager, Wayne County, Goldsboro, NC	2001 – 2014
County Manager, Washington County, Plymouth, NC	1993 – 2001
Executive Director, Columbus Co. Econ. Dev. Comm., Whiteville, NC	1990 – 1993
County Emergency Mgmt. Dir./Deputy Mgr., Pamlico Co., Bayboro, NC	1986 – 1990

BACKGROUND

Chatham County is located on Georgia’s Atlantic coast and has 2,250 employees and a population of approximately 295,000. I directly supervised 35 employees. The general fund budget is \$600M and the total budget is \$998M.

The three most important issues facing Chatham County are:

- 1) Roadway & Bridges – due to the growth of the Savannah Georgia Ports along, Visitors and growing populations, traffic is increasing at rates over 18% a year with truck traffic being the greatest causing major damage to major highways, bridges, and secondary roads.
- 2) Workforce Development – with the new industries such Amazon, Hyundai, and many logistic centers, the need for skilled, pre-trained and educated individuals must be in place prior to new industry. At the present time, Chatham and surrounding counties are having to “catch-up” causing a strain on the local technical and four-year colleges.
- 3) Drainage – Chatham County averages 13 feet above sea level. The introduction of new industries, warehousing and new housing, the county drainage system is meeting capacity. Widening and deepening of canals, flood gates, and reservoirs are now required along with participation of developments to assist with reducing runoff and cost of improvements.

WILLIAM “LEE” SMITH, III

GENERAL, MANAGEMENT STYLE AND EXPERIENCE

Fernandina Beach caught my interest due to my 35 years of experience in coastal communities. My experience with emergency management dealing with hurricanes, chemical spills, drainage, and continued growth regarding tourism matches the needs of the City. I have management skills and will offer Fernandina Beach a fresh look issues and opportunities.

My management style is one of team building and involving all levels of employees to be assessed regularly and be a part of developing solutions for city issues. I would sum it up and say my style involves participation and regular oversight of services and employees.

My staff would say that I am fair, I keep to my word, am painfully honest, ethical and care about those I work with.

Elected officials would say that I am honest, not a “yes” man, respectful, creative and a problem solver.

My strengths are that I am a consensus builder, strong community partner, have strong work ethics and am a team builder.

In terms of weaknesses, I can be impatient at times, can overload myself, sometimes not good at asking for assistance.

No one employee is the same; therefore, I have utilized a general appraisal methodology that measures effectiveness, attendance, work quality, etc. These are very numeric. The key to success is the annual development of a work plan for every employee. Whereby, all supervisors and department managers meet with employees to jointly review what they do well and where improvements are needed. At that point a jointly agreed upon plan is developed and understood so the employee comprehends the expectations and what is required to improve and know this plan must be adhered to. Last, employees should be met with at least twice a year to discuss their successes and needed improvements. If we wait an entire year, we may set the employee up for failure of management does not recognize what is occurring until the issues are major.

My most recent achievement was the establishment of a new county police force in a six-month period. The County and City of Savannah decided to part ways regarding police and the Commissioners gave me a budget and timeline of which both were met with an approximate \$3M reduction in police service but with higher service levels such as response times averaging 7 minutes or less. Most importantly we established a real “community” police force that talks with the businesses and citizens, participates in community events even on their own time and are seen as allies not enemies.

My biggest failure was in Wayne County, NC. The County developed and initiated an automated payroll system. BETA testing had small glitches; however, when the system went “live” major errors occurred causing major overpayments to employees. We utilized a third-party company to

WILLIAM “LEE” SMITH, III

aid in the transition. I believe my failure was depending too much on the third-party, not bringing my team together more closely and listening to their concerns. I have since, with projects of that magnitude, utilized a project manager to keep the process moving and keeping me informed of issues and progress.

Unfortunately, I have fired several people during my career for various reasons including but not limited to theft, disorderly conduct, inability to do the job properly, and bringing about an unsafe work environment. The firing of someone should be no surprise to them if management and supervisors have been paying attention to issues and counseling the employee. Unless the infraction was great enough to warrant immediate termination, then the process of adhering to HR policies of progressive discipline must be adhered to. It is never easy to terminate someone, but I have always approached these issues with complete data and documentation. Terminations must be done face to face in a safe environment with witnesses. Last, I try to keep my emotion out of the process; however, that is nearly impossible. Though the individual's employment must be terminated, I can help but think of the impact to the individual and families as well as the department of which the individual worked.

The challenges facing the new city manager will be getting to know the team, how they work and understanding what the city priorities of the Board are. Specifically, team building with staff, capital projects regarding roadways and equitable recreation amenities, commercial growth and drainage issues throughout the city, sea level rise and impacts on beaches.

The first six months in Fernandina Beach I would:

- 30 days – Get to know the management team as a group and as individuals, meet with board members to see as a board where my attention should place per their priorities. Also, meet with members to get a feel for processes, proper and preferred communication processes, and frequency. Budget review with team.
- 60 – review strategic plans and ordinances, continue to travel the city to inspect buildings, assets, problem areas, etc.
- 90 – meet with community leaders to get a feel for what the concerns of community are to incorporate into my work plans while being sensitive to problematic issues.
- 120 – at this point manager should have a sense of the culture of the community, regular community meetings should be scheduled, personally should be somewhat engrained in the city, need for formal community sessions to see where the city stands with projects and general concerns and if the board chooses to hold work sessions and education session with the Board for the next six months and up to 5 years forward.

I have excellent relationships with the media as I regularly communicate with them, am always honest and forthright (except in cases of litigation details, personnel, etc.). There is nothing in my background that would embarrass the city.

WILLIAM “LEE” SMITH, III

I have initiated utilization of social media platforms for public education, getting the facts out, notices, giving regular video updates and short sessions to stay ahead of community concerns. Also, there must be someone or a department that monitors all these platforms to keep the Board and management informed of trends, both positive and negative.

I do not believe anyone would contact a potential employer with concerns about me.

In my leisure time I like to spend time with my family, kayaking, concerts, festivals, travel and cook (taught by some of the best southern cooks), like to volunteer occasionally with Habitat for Humanity and Food Bank.

SIX ADJECTIVES OR PHRASES YOU WOULD USE TO DESCRIBE YOURSELF

- Results-oriented
- Engaged
- Ambitious
- Diligent
- Passionate
- Analytical

REASON FOR LEAVING MOST RECENT JOB

Fairly new board that were seeking a different direction for the county. There were a couple of highly intense projects which caused rifts among members and ultimately communication broke down which impacted administration. We negotiated a severance agreement, and I resigned on January 3rd of this year. I have no regrets or hard feelings with/towards the county.

MOST RECENT OR RELEVANT SALARY

My salary at Chatham County was \$253,000 plus vehicle allowance and benefits.

Section 11

CB&A Background Checks

**Background Check Summary for
WILLIAM LEE SMITH III**

Criminal Records Checks:

Nationwide Criminal Records Search	No Records Found
County	
Chatham County, GA	No Records Found
Wayne County, NC	No Records Found
State	
Georgia	No Records Found
North Carolina	No Records Found

Civil Records Checks:

County	
Chatham County, GA	No Records Found
Wayne County, NC	No Records Found
Federal	
Georgia	No Records Found
North Carolina	No Records Found

Motor Vehicle

Georgia	No Records Found
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Credit

Overall, very good

Personal Bankruptcy

No Records Found

Sex Offender Registry

Not Listed

Education

Confirmed

Employment

Confirmed

Social Media

Nothing of Concern Found

**Background Check Summary for
WILLIAM LEE SMITH III**

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

**Background Check Summary for
WILLIAM LEE SMITH III
Personal Disclosure**

Personal Disclosure Questionnaire

Name of Applicant: William Lee Smith III

The following questions are designed so that we will be able to make full disclosure to our client concerning your background. Please answer them honestly. Cutting corners or misrepresenting your past will result in you being eliminated from all further searches conducted by this firm. We understand that frivolous charges are sometimes made and that charges do not mean you were guilty. We also understand that you may have been wronged and needed to seek compensation. The bottom line is that we want to be certain that our client is fully informed. If you have any questions, please contact us for clarification.

Please explain any yes answers on a separate sheet of paper.

1. Have you ever been charged or convicted of a felony?
Yes ☐ No ☒
2. Have you ever been accused of or have been involved in a domestic violence or abuse incident?
Yes ☐ No ☒
3. Have you ever declared bankruptcy or been an owner in a business that did so?
Yes ☐ No ☒
4. Have you ever been the subject of a civil rights violation complaint that was investigated or resulted in a lawsuit?
Yes ☐ No ☒
5. Have you ever been the subject of a sexual harassment complaint that was investigated or resulted in a lawsuit?
Yes ☐ No ☒
6. Have you ever been charged with driving while intoxicated?
Yes ☐ No ☒
7. Have you ever sued a current or former employer?
Yes ☐ No ☒
8. Please list links to all your social media accounts (Facebook / Instagram / LinkedIn / Twitter, etc.) and your personal web page if you have one.
Facebook, Instagram, LinkedIn
9. Is there anything else in your background that, if made public, would cause you, our client or our firm embarrassment if it came to light through the press or any other mechanism?
Yes ☐ No ☒
10. Please provide a list of any lawsuits in which you are or have been a party either as plaintiff or defendant.
N/A

Attested to:

William Lee Smith III
Signature of Applicant

Please email this form via PDF DOCUMENT to Monique@cb-asso.com or via fax to
(561) 621-5965 no later than 5:00 PM MST 07/14/2023.

(Note: Please be sure to sign the form with your actual signature if you are sending Fax or PDF Document)

CB&A Reference Notes

**Reference Notes
William “Lee” Smith**

Dead Kicklighter – Commissioner, Chatham County, GA 912-507-1343

Mr. Kicklighter has worked with Mr. Smith since 2014. Mr. Smith was an excellent manager, and he did a great job for Chatham County. He was very intelligent, and he communicated well with staff and with the Commission. He made good decisions both when hiring and in general.

Mr. Smith was often out in the community. He was very personable, so he interacted well with residents. He provides the information they need in a professional way. He kept the Board informed through phone calls and texts. When they requested information, he confirmed the request through email and then followed up with a hard copy of the data.

A previous Commission, prior to Mr. Kicklighter’s tenure on the Board which began in 2001, allowed a developer to build infrastructure that did not meet County standards with the understanding that the Homeowner’s Association (HOA) was to maintain the drainage system and the roads in certain areas. Decades later when the infrastructure started failing, the HOA could not afford to replace it and the developer was long gone. Mr. Smith held meetings with staff and the HOA. He developed a public/private partnership in which the HOA pitched in a substantial amount of money to bring the system up to code, and the County took control of roads and drainage in the area. He involved employees from all pertinent departments and helped right a wrong in the community.

Customer service is important to Mr. Smith. He has good financial skills, and he is good about completing tasks within the timeframe given. He responds to stress as well as anyone.

Anyone leading a large government body faces controversial issues on a daily basis, and Mr. Smith was no exception. He handled each scenario with dignity, respect, and dedication to the County and its employees. His background is clear of anything that would concern an employer. He does have detractors in the community, which is common for those in his position, but Mr. Kicklighter did not name anyone specifically.

Mr. Kicklighter would hire Mr. Smith. He will do a great job for any community fortunate enough to hire him. They will be satisfied with his job performance.

Words or phrases used to describe Lee Smith:

- Intelligent,
- Thorough,
- Hard working,
- Compassionate, and
- Kind.

**Reference Notes
William “Lee” Smith**

Strengths: Brings solutions to the table when presenting issues, leads in a way that the staff knows he means business but in a way where he is well liked by them.

Weaknesses: As long as the elected officials clearly communicate what they want from Mr. Smith, they will have no issues with him.

Linda Cramer – Assistant County Manager, Chatham County, GA 912-433-7615

Ms. Cramer has known Mr. Smith since 2014. He led many different types of projects while working with elected officials on the Board as well as constitutional officers. Mr. Smith brought his experience from Wayne County to Chatham which was very helpful in resolving their issues. One of the first projects they worked together on was a strategic plan, which previous managers had avoided. He first met with constituents to learn of their vision for the community and then worked with staff and the elected officials to create a plan and move forward.

When hiring Mr. Smith made good decisions. He included department heads in the interview process and listened to their feedback but was responsible for the final hiring decision. His decisions in general were good. He was not afraid to implement change when it was needed if he could. Change is not always possible when working with constitutional officers. He really focused on the strategic plan and aligned the organization to develop processes around it. He was not afraid of confrontation; he handled it well while diffusing the situation.

Being out in the community was not Mr. Smith’s main responsibility. He created a public information office to relay some information. During the pandemic he led meetings on zoom. He worked well with the public in Commission meetings. He kept everyone informed to the extent appropriate as some matters were confidential.

The County police force was combined with the City of Savannah. While being very costly, they also noticed that officers spent all of their time in the city and not in the unincorporated areas of the County. They decided to reestablish their own police department and worked together on it. Mr. Smith hired the Police Chief, brought over some of the officers from Savannah, and contracted with the Sheriff until they were fully staffed.

When residents had a complaint, they previously had to call the office. Mr. Smith implemented a citizen records management system so anyone can go online and submit service requests. This system reduced call volume and improved their capacity to track and respond to issues.

While Mr. Smith had fairly good financial skills, that was not his main focus. However, he worked for smaller counties where he wore many hats and so he understands the process. He met deadlines when it was possible but at times, they all run into roadblocks. He could be firm, but he was not a yeller. During stressful situations he worked with his team to resolve the issue.

Reference Notes William “Lee” Smith

Some of their work was controversial, the police demerger is one example. They have a volunteer fire department that runs via subscriptions, but no one was paying them. The County is in the process of taking ownership and that has been controversial. Also, Mr. Smith was the final person for the grievance process on employees recommended for dismissal. Lastly, when they had to make a change in the courts, they received push back and he had to stand his ground. He handled these difficult situations well.

Mr. Smith left the County when a new Chairman came on board and wanted a change. They put Mr. Smith on investigation and promoted the Assistant Manager, who they knew, to the position. He had detractors in the community though this is common for someone in his position.

Ms. Cramer would hire Mr. Smith. He is a good manager though he needs a good admin to help him with scheduling. He is very talented, and he did well in Chatham County, but he may have even more success in a smaller municipality.

Words or phrases used to describe Lee Smith:

- Talented,
- Approachable to the staff,
- Decisive,
- Experienced,
- Creative, and
- Networks to resolve issues.

Strengths: Experience, looks to connect and collaborate rather than recreating the wheel, strategic planning.

Weaknesses: A few times he got ahead of the Board, meaning he was going down a path and had not communicated to the Board members. Also, he looked for connections between agencies which was not a weakness, but it could slow progress. Lastly, he and his two assistant managers attended all the same meetings. It may have been more effective to divide responsibilities between the three.

Michael Kaigler – Assistant County Manager, Chatham County, GA 912-657-7080

Mr. Kaigler has known Mr. Smith since 2014. Mr. Kaigler is currently serving as the Interim Manager. Mr. Smith did a good job for Chatham County. He served in several capacities in North Carolina and worked well with the former Chairman.

Chatham County has a hiring system with interview panels, though the final decisions are typically made by Mr. Smith and his assistants. His decisions both in hiring and in general were good. His strongest trait is innovation, though he was asked to be more of a change agent in

Reference Notes

William “Lee” Smith

Chatham County as the previous manager had been in the role for more than two decades and the organization was significantly behind the times.

While Mr. Smith did not attend all community meetings, he was always there when he was asked to be. He worked well with the public and many of the residents were sad to see him leave. He was good about keeping the leadership team informed and he involved them in the decision-making process.

Mr. Smith likes to be out front, rather than behind a desk. He walked through the departments and took random employees to lunch periodically to listen to their input. He coined the phrase they still use, which is “Team Chatham” and helped staff work cohesively as a team.

The County’s payroll system was antiquated, and Mr. Smith led the team to install new software. Employees who had worked for the County for years resisted the change, but he led the way and eventually they realized it was a better way to work. He also developed a customer service system where residents can submit their request for service or file a complaint. He ensured that every entry was always given a response, even when the County was not able to fill their request.

One skill Mr. Smith prides himself on is keeping up to date on the financial documentation and budget. He will take the information home and pour over it in his downtime. He coped very well in stressful situations. He internalizes some things but handles stress well.

Mr. Smith has not been involved in anything controversial. The Board changed after an election and a minority of the Board wanted things that were either not possible or were questionable from an ethics standpoint. Mr. Smith stood up to them, which eventually led to his departure. Also, following a long-term manager can be difficult and some in the community wanted the same leadership they had before, Mr. Smith’s style was different.

Mr. Kaigler would hire Mr. Smith as he is an excellent manager. Employees who work for him have very positive things to say about him.

Words or phrases used to describe Lee Smith:

- Caring,
- Outgoing,
- Sympathetic,
- Friendly,
- Decisive, and
- Outgoing.

Reference Notes
William “Lee” Smith

Strengths: Very personable, very organized, works well with others, developed the County’s first strategic plan.

Weaknesses: Time management and perhaps his willingness to accommodate some elected officials.

Paula Krissler – Executive Director, Healthy Savannah, Savannah, GA 912-272-9494

Ms. Krissler met Mr. Smith shortly after he was hired in 2014 and she is honored to be one of his references. Healthy Savannah is entirely focused on policy and systems change which requires engagement with the City and County. They met on several occasions, and he attended their meetings. He did a great job. He was very supportive of their organization and accomplished amazing things for the County.

Decisions made by Mr. Smith are good. He was visible in the community. Their organization was known for handing out inexpensive plastic bicycle pins. Mr. Smith ensured that he always had one to show his engagement with the community. Healthy Savannah had over 200 public and private partners, and he engaged well with all of them.

Ms. Krissler was surprised the first time Mr. Smith called her personally, he is very responsive. He faced both sides of any aisle and kept them equally informed. He was also good about sharing information when she was trying to understand a situation. He has a good perspective.

The grants they received for the Trail plan involved SPLOST funds, and it languished for over a decade at the County waiting for the required plans to be developed before they could move forward. Mr. Smith was an integral part of the process to create the plans and secure the matching federal dollars. The project finally moved forward through his efforts. This project was somewhat controversial because it involved neighborhoods and communities, but he was levelheaded and listened to all sides while keeping the project moving forward.

Controversy existed but Ms. Krissler stayed out of it. She does feel that the Commission tended to be less progressive than Mr. Smith is. That said, she was still shocked when Mr. Smith was suspended and does not know the reason why. She has spoken with others in the community, and they were just as surprised as she was, they just did not see any negatives in him. He handled the stress of the situation well. She is not aware of anything in Mr. Smith’s background that would be concerning to an employer.

Ms. Krissler would hire Mr. Smith, she felt he was a great manager for their community, and he was always very accessible.

**Reference Notes
William “Lee” Smith**

Words or phrases used to describe Lee Smith:

- Strong,
- Smart,
- Engaging,
- Community minded, and
- Organized.

Strengths: Courage, charisma, dependability, integrity, respect for others, and flexibility.

Weaknesses: None identified.

Will Peebles – Reporter, Savannah Morning News, Savannah, GA 706-699-4681

Mr. Peebles has lived in Chatham County since 2016. In 2022 Mr. Peebles took over the city beat, and his first assignment was to investigate Mr. Smith’s suspension. Mr. Peebles never got an exact answer of what led to the suspension and the off the record comments seemed like it was primarily a disagreement with elected officials who had a different vision for the community. Mr. Smith is not a yes man and he is also realistic. He really liked his job and if he was given a blank slate to work, he would still be the manager in Chatham County. His tenures in Chatham and in his previous positions were far longer than average for the field.

Mr. Smith was hard to crack as he is legally minded and was in the process of consulting with lawyers regarding the suspension, which shows that he is not afraid to ask for help or guidance if he does not know an answer. He was very transparent and open with Mr. Peebles.

Mr. Smith ran Commission meetings and answered questions, without running over the elected officials. Nothing ever seemed to be off in Board meetings, he worked with difficult Commissions and was often the voice of reason.

The most common comment that Mr. Peebles heard after Mr. Smith was suspended was “What did Lee Smith do?” The community seemed very surprised by the suspension. Mr. Peebles personally feels that if Mr. Smith had done something worthy of a suspension that the Commission would have had no qualms in stating these actions publicly. It seemed like Mr. Smith told some Commissioners no a few more times than they would have liked him to.

Mr. Smith knows government and he is smart.

**Reference Notes
William “Lee” Smith**

Words or phrases used to describe Lee Smith:

- Likes his work,
- Realistic,
- Transparent,
- Open, and
- Likeable.

Strengths: Capable of working with elected officials who are more politicians than civil servants, legal minded, very transparent, very open, likeable.

Weaknesses: In Mr. Smith’s personnel file the one negative that Mr. Peebles remembers is communication, but he cannot remember the date and it seems like it was noted towards the beginning of Mr. Smith’s tenure in Chatham County.

Wilbur Andy Anderson – Former Commissioner, Wayne County, NC 919-344-1202

Mr. Anderson was elected to the County Commission in 1993. He met Mr. Smith in 2001 and they worked together until Mr. Anderson retired in 2012. His comments are based on Mr. Smith’s job performance during the time that they worked together.

Mr. Smith was one of the best County Managers Mr. Anderson has ever known. Mr. Anderson was the odd man politically (meaning, the other Commissioners belonged to a different political party). Mr. Smith always made sure Mr. Anderson was well aware of anything that happened, and he treated all the Commissioners equally. He was very honest and above board.

During the interview process the hiring panel stated that Mr. Smith was the best Manager they found. He did his homework and arrived at Wayne County extremely knowledgeable of their government. He worked well with others, worked overtime to complete projects, and brought several businesses to the community. He had a good knowledge of finance. Anyone creating a team always asked Mr. Smith to be part of the group because of his expertise.

Because Mr. Smith had a great deal of foresight on what was coming, he advised the Commission well on how to budget and manage their resources. He was active in securing funding from state agencies. The County owned a small airport. He wanted to show the public that the airport was something special. He formed a team to create a name and logo for the airport and was very proactive in advertising it. He successfully applied for grant monies to install a LED light system in the airport, they were one of only three airports at the time to have this ultra-modern lighting. The Wayne Executive Airport is one of the finest airports in North Carolina, thanks to the efforts of Mr. Smith.

**Reference Notes
William “Lee” Smith**

Everyone hired by Mr. Smith was a good fit for the role and organization. He terminated the employment of individuals who were not meeting expectations. He is a go-getter and does not sit behind a desk. He is customer service oriented and stays on top of every issue. He advised the Commissioners well and they sought his recommendations on how to resolve issues. He generally completes assignments immediately, and he is always very timely.

Mr. Smith has not personally been involved in a controversial situation, but he was involved in controversial decisions made by the Commission. Nothing in his background would embarrass an employer. One of two of the new Commissioners at the time of his departure might disagree with this reference but they have a different management style and sought to make many changes within the organization.

Mr. Anderson was not on the Commission when Mr. Smith left and has no personal knowledge of what transpired. Due to an election the Commission went from having a majority of one political party to having a majority of the other political party. Mr. Anderson heard that the new Commissioners wanted a manager that belonged to their political party.

Based on what Mr. Anderson knows, he would hire Mr. Smith and highly recommends him. He is a great Manager.

Words or phrases used to describe Lee Smith:

- Knowledgeable,
- Go-getter,
- Motivated,
- Gets along with people,
- Helpful, and
- Manager and director.

Strengths: Finance, management, proactive, accomplishes tasks, visionary, manages staff well, keeps things moving.

Weaknesses: None identified.

Jack Best – Former Commissioner, Wayne County, NC 919-920-9988

Mr. Best has known Mr. Smith since 2001 and worked with him as a County Commissioner for eight years.

Mr. Smith rated 95 of 100 on his review. He took a County that was cash poor and brought it to a very comfortable position. The County now pays cash for items like cars, equipment, and

Reference Notes William “Lee” Smith

computers. He improved their bond rating and did a wonderful job handling the finances. He is his own man and has his own ideas. He knows how to get the job done and does well.

The only thing Mr. Best expects is to not have any surprises. Mr. Smith kept the Commissioners very well informed. He was willing to talk through the issues. Mr. Best did not always agree with Mr. Smith, but he was frequently right. They talked two to three times a week and attended Commission meetings every other week. Their interactions were always very good.

Mr. Smith made excellent decisions when hiring personnel. He was hands-on and he delegated authority. He improved the community during his tenure. He was innovative and he kept the organization functioning at a high level. He was not perfect when dealing with the public, but he had a good rapport with community leaders.

Mr. Smith put a team together from the staff, the County Commissioners, and residents to build a nice civics center. Residents complained about the project until it was completed, and they realized how beneficial it is. He wanted to build an animal shelter, but some Commissioners felt the cost was too high. Mr. Smith turned to the community and gathered donations equaling 10-20% of the necessary funding.

Mr. Smith is absolutely customer service oriented and a problem solver. He is very quick to complete tasks and he never procrastinates. He determines what needs to happen and does it.

The only controversy involving Mr. Smith occurred after an election. The new Board members were of a different political party than the Commissioners who had been on the Board for 100 years. The new Commissioners changed the entire focus of the organization. From day one they wanted to terminate Mr. Smith’s employment and hire a manager from their own political party. They kept him in place for a year, so they did not have to pay severance, and then parted ways. These Board members are the only individuals who might disagree with this reference.

Mr. Best would hire Mr. Smith tomorrow if he had a job available. Mr. Best likes Mr. Smith as a person and feels he is a great Manager.

Words or phrases used to describe Lee Smith:

- Very honest,
- Hardworking,
- Astute business person,
- Good financial manager,
- Manages employees well, and
- Did a wonderful job.

**Reference Notes
William “Lee” Smith**

Strengths: Good financial manager, treats employees well and gets along with most of them, managed a large staff and a \$70 million dollar budget well, did an exceptional job.

Weaknesses: If he had any, it would be that he likes to do things his own way.

Borden Parker – County Attorney, Wayne County, NC 919-735-7275

Mr. Parker is a County employee but also works in a private law firm. He has known Mr. Smith since 2001. Mr. Smith did an extremely good job for Wayne County and was a very competent manager.

Interactions between Mr. Parker and Mr. Smith are exceptionally good. Mr. Parker considers Mr. Smith a friend but acknowledges that they were not close enough to socialize outside of work.

Mr. Smith made good decisions when hiring personnel. His decisions in general were very good. He was an innovative manager who kept the organization running at a high-performance level. He was a leader who rallied the employees around the vision of the elected body.

Mr. Parker is an old country lawyer who prefers not to use email. They met in person three to four times a week. Mr. Smith was very good about keeping others informed. His work was completed on time.

The only complaints Mr. Parker heard about Mr. Smith were from individuals who wanted Mr. Smith to do something that he felt was not in the best interest of the County. He worked tremendously well with the public.

Mr. Smith managed the budgeting process very differently from the manager he replaced. He streamlined the process, added more accountability, and made it easier to understand. The Board trusted the budget was well done and overall they did not feel the need to scrutinize it. Mr. Smith has excellent financial skills.

Mr. Smith and the Board decided it was time for Mr. Smith to resign. Some might consider the incident controversial, but Mr. Parker does not. Mr. Parker is not personally aware of anything in Mr. Smith’s background that would embarrass an employer. Though Mr. Parker could not name anyone in particular who would disagree with this reference, some in the community might say Mr. Smith was too controlling and wanted to do things his way rather than how the Commissioners wanted. Mr. Parker does not agree with this assessment.

Mr. Parker was on the hiring panel that selected Mr. Smith and would hire him again. He was a good Manager for Wayne County.

**Reference Notes
William “Lee” Smith**

Words or phrases used to describe Lee Smith:

- Extremely competent,
- Very energetic,
- Intelligent,
- People person,
- Hard working,
- Willing to think outside the box.

Strengths: Good with finances, good at managing staff.

Weaknesses: Works too hard.

Rita Hodges – Former Chairman of the School Board, Lenoir County, NC 252-560-9392

Ms. Hodges met Mr. Smith in the early 2000’s. She interacted with him as the Chairman of the school Board in a neighboring County and also served on a regional mental health board with him. She has the utmost respect for and highest opinion of Mr. Smith and his abilities.

Mr. Smith was very knowledgeable, always professional, and he managed tasks well. His job performance was excellent, and he earned the highest marks possible on reviews. He interacted very well with others.

As Ms. Hodges does not live in the County, she was not privy to every hiring choice. However, the employees hired by Mr. Smith that she interacted with were top notch. Mr. Smith’s decisions in general were very good.

Mr. Smith was an innovator who thought outside the box. He assessed current operations before making any changes. He then improved processes until they functioned at the highest possible level. He was very good about keeping others informed, primarily through email but sometimes via the telephone.

The mental health board faced a very sensitive personnel issue where someone accused a provider of improprieties. Mr. Smith resolved the situation. He had good financial skills and was always quick to respond to phone calls and requests for information. Everyone that Ms. Hodges knows and works with would agree with the statements in this reference.

Ms. Hodges is not aware of anything controversial in Mr. Smith’s private or personal background. She has not discussed his departure from the County with Mr. Smith, but her understanding is that the resignation was politically influenced and not due to job performance.

Reference Notes
William "Lee" Smith

Without a doubt Ms. Hodges would hire Mr. Smith. Any community would be fortunate to have Mr. Smith as their administrator. He is an asset.

Words or phrases used to describe Lee Smith:

- Professional,
- Knowledgeable,
- Extremely competent
- Top notch individual,
- Good communicator, and
- Innovative.

Strengths: Communication.

Weaknesses: His plate is so full that he is always busy.

Prepared by: Lynelle Klein
 Colin Baenziger & Associates

CB&A Internet Research

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

Savannah Morning News (GA)
December 5, 2022

Smith GONE - Long-suspended county manager, Chatham reach severance agreement; commission appoints Michael Kaigler interim

Author: Will Peebles

The Chatham Commission on Friday approved the resignation of now-former County Manager **Lee Smith**, who has been on administrative leave since July 21, and formally began contract negotiations with Assistant County Manager Michael Kaigler, making him **Smith's** official successor. Kaigler had been serving as interim manager since **Smith's** suspension.

Chatham County Chairman Chester Ellis said after a lot of back and forth with **Smith's** lawyer, Brent Savage of Savannah-based Savage Turner Pinckney Savage & Sprouse, they were finally able to come to an agreement.

Smith, reached by text Friday, said the day was bittersweet. "Today is somewhat bittersweet for me. I tremendously enjoyed my time as part of Team Chatham and will always consider the entire team as family. I am glad the negotiations were finalized today so myself and Chatham County can move forward. I am pursuing opportunities in a number of places but consider Savannah home. I plan to maintain my home here and possibly return when retirement rolls around," a text from **Smith** read.

Ellis did not divulge any details about **Smith's** severance agreement and told reporters he would rather they "get it in writing" to avoid any inaccuracies, though he also said the contract "will be made public." Savannah Morning News acquired the agreement from **Smith's** lawyers Friday afternoon. In **Smith's** severance agreement, most questions surrounding his resignation are answered, but not all.

What we know:

Smith will officially resign as county manager, effective Jan. 2, 2023. **Smith** will remain on county payroll for a full year, receiving bi-weekly installments of \$9,931.20, for a total of \$258,211.20. The agreement outlines this as "nine months' salary in accordance with his employment contract and additional three months' salary as is stated in the Chatham County Enabling Act."

Additionally, the county will continue to make employer pension contributions until Jan. 2. The county will stop paying **Smith's** annual car allowance of \$7,200 per year and will make no further contributions to **Smith's** retirement plan after Jan. 2. **Smith** may be eligible to draw benefits as allowed in accordance with the pension and health plan not to exceed 12 months from the agreement.

Still no reason given on why **Smith** dismissed. In a previous interview with SMN, **Smith** said he

Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)

believed the reasons for his suspension to be "personal and political," but even after the severance agreement was approved Friday, Ellis refused to say why **Smith** was suspended, again deferring to the agreement itself. But the agreement didn't have any information on why Smith was suspended.

In the agreement is a stipulation: "**Smith** has not engaged in, nor is **Smith** aware of, any misconduct or wrongdoing on the party of the County of any kind or any regard." Additionally, the agreement stipulated that **Smith** will not sue the county "out of or in connection with the employment relationship, previously existing between them, or the termination of that relationship," unless the county violates the agreement in any way.

"Let me just say, I wish **Mr. Smith** well. I guess some might say I might have been his cheerleader," Ellis said.

Smith said in a previous interview that the whole process -- uncertainty about why he was suspended, dealing with severance negotiations, watching his team carry on without him -- has been rough on him both mentally and emotionally. When people ask him why he was suspended, he doesn't have an answer. "I tell them: 'I don't know, I must have been in a coma. Because I don't know what I did,'" **Smith** said. "Nobody's telling me anything. So, all I can say is: it has to be personal and very political."

In the time since his suspension, **Smith** and his lawyer have been negotiating a severance agreement with the county. **Smith** and Savage received an initial severance agreement sent by the county on Aug. 25 and a second proposal on Sept. 6. The later agreement included a smaller payout.

Smith told the Savannah Morning News last month that he sought three things from the severance agreement: vestment in the county's pension fund; health insurance in retirement; and the equivalent of nine months' pay.

Smith's contract called for the nine months' salary buyout should he be terminated without cause. **Smith's** salary at the time of his suspension was \$235,100, meaning he was contractually due \$176,325. According to Savage, **Smith** was pursuing a higher payout.

Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)

Savannah Morning News (GA)
November 6, 2022

Suspended Chatham manager speaks about his ouster

Author: Will Peebles

In July, Chatham County Manager **Lee Smith** was called into Chatham Commission Chairman Chester Ellis' office. At that meeting, he said Ellis was "very, very nice" and "compassionate," but ultimately handed **Smith** a letter, dated July 19, in which the chairman explained he was suspending **Smith** and placing him under investigation due to an unspecified "recent chain of events."

But even now, more than 100 days later, **Smith** has yet to be told what he did wrong or the findings of any supposed investigation. He still hasn't been removed from his position, not by resignation, termination or otherwise. "I do believe Chairman Ellis was trying to protect me from being fired by the [commission]," **Smith** said. "I believe that wholeheartedly, and others do also. It just was a way to block a [removal] vote, quite honestly."

Chatham County code requires a two-thirds vote -- six of the nine members -- to remove a county manager from office, but they must adopt a preliminary resolution stating the reasons for removal. This preliminary resolution must also pass by more than two-thirds vote.

In the time since his suspension, **Smith** and his lawyer, Brent Savage of Savannah-based Savage Turner Pinckney Savage & Sprouse law firm, have been trying to negotiate a severance agreement with the county, thus far unsuccessfully. **Smith** and Savage received the initial severance agreement sent by the county on Thursday, Aug. 25.

They received another severance agreement from the county on Sept. 6, this time with a smaller payout, and a request for an answer by Tuesday, Sept. 13, 51 days ago as of Nov. 3.

Smith said there are three things he's asking for in the severance agreement: He wants to be vested by the county to have a pension in retirement; to get health insurance in retirement; and nine months' salary. All three were in the agreement, **Smith** said.

Smith found the offer agreeable but county leaders reneged. "I signed it, we sent it back, and they then pulled the offer," **Smith** said. "My attorney and I, we looked at filing suit against the board for not fulfilling their obligations [in the severance agreement] and giving me something which I signed in good faith."

Now, **Smith** is still waiting, and he says the whole process -- uncertainty about why he was suspended, dealing with severance negotiations, watching his team carry on without him -- has been rough on him both mentally and emotionally. When people ask him why he was suspended, he doesn't have an answer. "I tell them: 'I don't know, I must have been in a coma. Because I don't know what I did,'" **Smith** said. "Nobody's telling me anything. So, all I can say is: it has to

Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)

be personal and very political."

A change in attitude toward **Smith**

A few years ago, **Smith** came out as gay. "I went through a pretty bad divorce after I came here, and soon after that, I came out as gay. And I don't wear pride flags or anything like that. I'm just who I am," **Smith** said. "And I will say that I felt a difference with board members after that happened. It is what it is. You can like me; you can dislike me. I am who I am."

Smith says after coming out he felt that he was viewed differently by some members of Chatham Commission, though he specifically said Ellis treated him no differently after. "I would say with the chairman. No. But with some of the other board members? Yes. I do," **Smith** said. "I can be criticized for this, whatever happens, happens. But I do believe that just the way I'm treated has changed. I just feel disrespected."

Commission complaints

While he claims to not know the exact reason some commissioners want him removed as manager, he has suspicions. **Smith** says through conversations with commission members he deduced that their complaints stemmed from two things: Their inability to review **Smith's** performance formally, and that he was not communicating "the way they thought I should communicate." But since the county has yet to provide him with reasoning for his suspension, he's not sure. All he knows is that someone -- or more -- wants him gone.

In the time since he was put on leave he's been applying for jobs elsewhere. But due to media coverage of his suspension and supposed investigation, he says employers are hesitant to give him a callback. "I've been applying for jobs. I can't even get a return call on jobs because this is still outstanding," **Smith** said. "You look on Google, and you're gonna see this first: That I've been suspended and under investigation."

"This literally has hurt me so badly. You can't imagine. And I'm going to use the words 'absolutely terrified' about my future. I'm 58 years old," **Smith** said. "Maybe some decade I can retire, we'll see. But right now, I plan to work until I'm way, way gray."

Despite missing his friends and coworkers in "Team Chatham," **Smith** is fine with leaving, he said, provided the county meets his requests in the severance agreement. "I'm just looking at what I'm owed. What I deserve for the job I've done in eight and a half years," **Smith** said. "I don't have a single thing in my file. I've never been reprimanded, in writing, or in public, or I mean, nothing."

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

Savannah Morning News (GA)
July 23, 2022

Lee Smith suspended, placed on paid leave

Author: Will Peebles

Chatham County Manager **Lee Smith** has been placed on paid leave by County Commission Chairman Chester Ellis, according to District 6 commissioner Aaron "Adot" Whitely.

Whitely said he didn't know why **Smith** was placed on paid leave, but said "I stand by the chairman's decision and trust his judgment in this matter." Ellis and most of the other county commissioners are attending the National Association of Counties conference this week in Adams County, Colorado. Multiple phone calls to Ellis for comment were not returned.

Whitely said the Chatham Commission had not yet had time to discuss the matter, and at least two members said they were unaware of **Smith's** suspension. **Smith** could not be reached for comment. He was not in his office on Friday, according to an administrative assistant.

Smith's suspension comes during a week marked by a testy negotiating session for the Local Option Sales Tax, a 1% sales tax levied on goods and services purchased in the county. The session ended at an impasse, with the county and the leaders of its eight municipal governments far apart on how LOST should be divided. LOST revenue provides approximately \$100 million a year for local governments, funds used to offset property taxes.

Smith has been the county manager since May 2014. **Smith** was hired by the county in 2014 following the retirement of longtime County Manager Russ Abolt. Abolt stayed on as a paid consultant for several months. **Smith's** suspension is with pay. **Smith** is the second highest paid county employee, with an annual salary of \$235,100. Chatham County Attorney Jonathan Hart is the highest paid at \$265,320.

Smith is a North Carolina native and previously worked as manager for Wayne County, N.C. It is unclear if Ellis intends to dismiss **Smith** from his position, but it would take a full commission vote for that to happen.

Chatham County code requires a two-thirds vote - six of the nine members - to remove a county manager from office, but they must adopt a preliminary resolution stating the reasons for removal. This preliminary resolution must also pass by more than two-thirds vote. The county manager may request a public hearing within 10 days.

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

Savannah Morning News (GA)
March 25, 2022

County to reconsider fire fee for unincorporated residents

Author: Nancy Guan

At a Wednesday morning workshop, Chatham County commissioners revisited the idea of implementing a fire fee instead of a fire tax for residents living in the county's unincorporated areas.

The Chatham Commission weighed the pros and cons of a tax versus a fee for more than an hour before deciding to consider introducing an ordinance that would allow the collection of a fire fee. This ordinance would replace one passed in December levying a fire tax.

The new ordinance could be discussed as soon as Friday's regularly scheduled Chatham Commission meeting, which prompted the scheduling of Wednesday's workshop. While the workshop was open to the public, the county failed to meet public notice standards outlined under the Georgia Open Meetings Act, which requires governments to give the public seven days notice of all meetings except those called in the case of an emergency.

The county officially noticed the meeting Tuesday.

When notified prior to the meeting of the potential violation, a county spokeswoman said the workshop had been talked about in the last commission meeting, held March 11. However, neither a time nor a date for the workshop had been set during that meeting, and a verbal discussion of a planned meeting does not satisfy the requirements of the open meetings law.

The workshop and the discussion of the fire fee are just the latest twist in a years-long debate on how the county can create a funding mechanism for Chatham Fire. Chatham Fire is a private nonprofit fire service that covers unincorporated Chatham County through a subscription service and has faced severe budget shortfalls - \$3 million in 2021 - due to non-payments.

Chatham Emergency Services (CES), which serves as the umbrella for Chatham Fire and Chatham EMS, approached the county in 2020 after discovering nearly a third of the total 35,000 properties in unincorporated Chatham were not paying the annual fire subscription fee. Although not paying into the fire subscription service has its consequences for residents and CES's budget, the organization is limited in its ability to collect from those non-paying property owners.

Since then, the county commission and staff have weighed different options that would streamline subscription costs and mandate residents within the unincorporated areas to pay into the service. Essentially, the county would fund CES while charging residents through property tax bills.

The estimated cost to fund CES, according to County Manager **Lee Smith**, is around \$11

Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)

million. But that amount, along with estimated fee rates for property owners, could change once the final audit is complete. Rates won't be decided until the budget is passed in June and collection wouldn't begin until the fall.

During the Wednesday workshop, **Smith** said state law prohibits the county tax commissioner from enforcing a fire fee, which is why the commission's original plan was to fund Chatham Fire through a fire tax. However, discussions about administrative costs at the tax commission office lead to considerations of a fee instead.

How it will be collected will depend on what's most efficient, cost effective, and who has the experience to do it, **Smith** said. "We saw a general movement that way, so we're going to move the ordinance to the fee, develop the methodology, then we can move forward with staff as far as how we do it," said **Smith**.

Whichever way the fee is implemented, commissioners ultimately stressed the importance of creating a fair fee rate -- one in which participating residents, especially the elderly on fixed incomes, will not have to be overburdened.

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

Savannah Morning News (GA)
September 1, 2021

County manager: Beleaguered 911 center for you in an emergency

This is an op-ed by Chatham County Manager **Lee Smith**.

Chatham County Communications, better known as 911, is a major service provided to our community. The department is responsible for routing emergency calls from citizens, visitors and motorists in an urgent situation or reporting an event witnessed. These calls consist of medical assistance needed, vehicular incidents, dangerous situations and the list goes on.

These calls require expeditious but concise data entry such as name, location, nature of the call, assessment of the situation and what emergency response services may be needed as directed by professional and dedicated 911 telecommunicators.

As noted in a news story published in this newspaper in early August, the 911 center has several vacant positions. However, the center consoles are always fully staffed, as 911 management has rearranged shifts to ensure full coverage as has been done for more than two years.

The county is recommending increasing salaries for telecommunicators in an attempt to better retain and attract qualified candidates. As additional positions are filled, 911 management is working to reduce 12 hour work shifts to reduce personnel fatigue.

The communication's center answers calls as quickly as possible; however, please keep in mind there are times the 911 center experiences a higher than normal level of calls due to multiple emergency events. These peak times will cause delays in answering calls and in some cases the incoming call will "roll" to an answering system. Your call has not been lost. The 911 system will automatically call the incoming number back with a telecommunicator prepared to take your information.

The 911 center receives over 10,500 calls per week with approximately 40% of those calls being administrative non-emergency calls. Citizens can help themselves and all other citizens by not calling 911 for non-emergency calls. These calls are holding telecommunicators for long periods of time creating long wait times for real emergencies.

Citizens can help to reduce the center's call volume by not calling 911 with non-emergency calls. Problems such as water meters, potholes, etc. are not emergencies. If you want to contact Chatham County with non-emergent items, please go to MyChatham.org on your mobile device's app or play store, download the app and register to report these types of incidents.

If you need information regarding a city or town service please contact them directly. We will begin a campaign to advertise these numbers in the next 30 days. The county will be working with all municipalities to begin a new process of non-emergent service calls within the next few months to direct you to the appropriate entity.

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

COVID-19 has produced a myriad of problems affecting 911. Hospitals are experiencing a heavier than normal patient load in emergency rooms. This in turn is increasing the wait time of ambulances waiting to admit patients which in turn affects 911. Additionally, people experiencing mild symptoms or possible contact with COVID-19 should contact a medical provider, not 911.

The 911 service is a crucial part of emergency response for over 350,000 people every day, including regular citizens, visitors and commuting workers coming from other areas. The County estimates receiving over 600,000 calls in 2021.

We need your help to keep Chatham County safe and allow 911 to do its job to dispatch emergency services such as fire, rescue and law enforcement to save lives.

Your Turn

Lee Smith

Guest columnist

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

Savannah Morning News (GA)
August 31, 2021

Mandate or incentivize? City of Savannah, others may pay employees to get COVID-19 vaccine - As COVID-19 cases continue to surge across Savannah and Chatham County, leaders are exploring ways to incentive the vaccine for their employees

Author: Katie Nussbaum

Less than half of the more than 4,000 area residents employed by the City of Savannah and Chatham County governments are vaccinated against COVID-19. Local leaders are hoping an incentive program will help to increase that percentage.

On Thursday, Savannah City Council voted to approve a resolution to allow the city manager to work with Chatham County, Chatham Area Transit and the Savannah-Chatham County Public School System to develop an incentive-based program to encourage workers to get vaccinated.

Together the four organizations employ nearly 10,000 people across the area. "I felt it was important for us that whatever we did, we should do it in unison and we should do it consistently because we're all connected," Savannah Mayor Van Johnson said. "It is so important for our teachers and school if our schools close and children go home, that affects all of our operations."

While it's still unclear what the local program might look like, Johnson said each entity would have its own program, and those initiatives could feature monetary incentives.

"So each of us would have our own program, but essentially, we will be giving the same amount of money to employees who have been vaccinated and as an incentive for those who want to be vaccinated," he said, adding that the program would have consistent starting and ending dates so that the vaccination rate could be tracked.

Chatham County Manager **Lee Smith** recently told state legislators only about 42% of county employees had been vaccinated. While the Chatham County Commission didn't adopt a resolution similar to the one passed by Savannah City Council, **Smith** made a plea for the public to get the vaccination during Friday's commission meeting..

"I'm not getting into the politics, I'm not going to get into how you feel about it. People are dying around the world, but they're dying in our hospitals," **Smith** said, adding that he personally knows 12 people aged 27 to 81 who had died from COVID-19 and were unvaccinated.

A Chatham County spokesperson said the county staff is still working on the issue and will be making recommendations to the commissioners soon. A spokesperson for CAT said the organization is also in preliminary discussions with the other entities, but staff has not finalized plans to present to the transit authority board for consideration.

Incentivizing people to take the vaccine isn't a new concept. Last week an Augusta Commission

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

committee voted to adopt a proposal to pay residents to get fully vaccinated. The \$100 payments would likely be in the form of a gift card.

The Augusta committee budgeted \$1.5 million for the initiative, which would include \$100 payments for as many as 10,000 residents. The majority of the money would come from American Rescue Plan Act funds.

Closer to home, Chatham Emergency Services is offering its employees vaccination bonuses. Full-time and part-time employees who show proof of full vaccination will receive \$250 and \$100, respectively.

Chatham Emergency Services operates a countywide ambulance service as well as a fire department that serves property owners in unincorporated Chatham County. The organization launched the incentive program on Aug. 25.

The discussion of incentive programs for City of Savannah employees comes as the delta variant has led to pandemic-high rates of COVID-19 cases and hospitalizations in Chatham County. Two days before the resolution passed, Johnson announced a moratorium on special event permits and revoked permits for events planned through Sept. 30.

Johnson had reinstated the city's mask mandate last month and council voted to ratify that resolution on Thursday, approving the restrictions on permits along with canceling events at the Savannah Civic Center and closing community centers.

Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)

Atlanta Journal-Constitution
August 6, 2021

You might experience delays when calling the Chatham County 911 call center. Here's why
Author: Katie Nussbaum

Savannah and Chatham County residents dialing 911 to report an emergency are experiencing delays in the calls being answered as the center faces a shortage of operators. The lags are marked by repeated rings. For those who abandon the calls, the system has a mechanism to seize those calls and give a return call with automated prompts, which will place the caller back in the queue for an operator. The 911 call center currently has about 20 vacancies, according to Chatham County Manager **Lee Smith**. "It's a major problem, but we're not at a crisis yet," **Smith** said.

The shortage creates a domino-like effect. When an emergency call comes in, operators stay on the line until first responders are on site. They cannot work other calls in the meantime. "So that means if you've got 12 or 15 people on shift that takes a person totally out of the loop. So quite frankly, when we peak out like that, there's not a lot you can do. You try to expedite calls, but expediting calls can be dangerous," he said. Several calls made to 911 recently by former Savannah City Council member Julian Miller went unanswered. Miller was calling to report a person who appeared to be having a medical episode along Abercorn Street. "He was leaning over like he was going to fall into traffic and cars were actually changing lanes to get around him. It was a dangerous situation," he said. The first two calls Miller made went unanswered for a combined 28 rings. Prior to getting elected to city council Miller served as the spokesperson for the Savannah Police Department, so he called an officer he knew to report the situation. In the meantime he received a callback from the automated system and after dialing one for an emergency, the phone rang another 12 times. Miller said the situation was frustrating. "It's kind of a hopeless feeling when you're waiting on an ambulance," Miller said.

Chatham County took over the 911 center in 2018. The operation serves Savannah and all Chatham County municipalities except for Tybee Island, which has its own 911 system. Fully staffed, the county's call center has about 100 operators and often competes with private industries and other employers like the Georgia Ports Authority for employees. "Sometimes with private industry, we're not able to compete at the same level. So it is very tough for local governments," **Smith** said.

To offset the shortage, operators are working longer shifts, but **Smith** said overtime can be dangerous for a stressful job. His office along with the 911 team and human resources are currently looking at ways to scale back the current 12-hour shifts by anywhere from two to four hours. "Twelve hours is too stressful and I think that is part of the issue; they're very stressed, that is a, a very difficult job. It's a thankless job," he said. "Those folks take a beating with folks not just trying to hear a call, but they're trying to de-escalate situations. So it's not just with medical protocols, they become mental health counselors. We deal with a couple thousand suicide attempts a year, which they de-escalate many times. That is very stressful." Non-emergency calls. Many local residents view 911 as the main contact number for local

Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)

government. Non-emergency calls accounted for 90,048 911 calls between Jan. 1 and Aug. 3, or about 40% of the 310,348 calls. Many of those calls are in regards to water, sewer or other municipal services, **Smith** said. "I know those calls may be important to you, and that you've got a concern about your water, or about a cat running through the yard. Not that that's not important, but to 911 it is not. 911 is for the safety of individuals and property, period," **Smith** said. The county is working to partner more with neighboring municipalities to put together protocols so that the call center will no longer be responsible for those non-emergency calls. If callers make their way through the automated prompts, it reverts the call back to 911. "I have made a commitment that that loop will close; it has to close. It's about lives, it's about property, a fire or it could be a wreck, those are more important," **Smith** said. "Eventually we're going to deny those kinds of calls with call takers and not take information." **Smith** said the change will happen by the end of this year.

The City of Savannah currently operates Savannah 311 for non-emergency calls related to property or city services and other municipalities might have to look at doing something similar. The county has also explored the possibility of a 24-hour call service where operators would take notes and information and forward it to the correct government entity or organization. "So we're trying to find a better effective way. It's going to cost, but when I look at putting people's lives in jeopardy, that cost is worth the investment," **Smith** said.

Recruitment. In an effort to fill the operator vacancies, the county has stepped up it's recruitment through recruitment videos and a larger social media presence. Applicants remain few in number but the county has seen an uptick in qualified candidates. New hires undergo a minimum nine-month training program, which also includes on-the-job instruction.

Smith said he considers the operators the first line of defense. "I'm not saying that anyone else is not as important, but if that first portal is not as effective and efficient as it should be, everything else fails," he said. "And that would be EMS, fire, law enforcement, marine patrol, because they have to have good data when they walk in to be able to service their calls." A communications officer trainee's pay starts at \$13.52 per hour and at a minimum applicants must have a high school diploma or GED and at least three months of work experience involving customer service, to include some experience dispatching or using a multi-line phone system. Applicants must also pass CritiCall testing, which assesses the skills and aptitudes needed to be a 911 call handler and dispatcher. Completion of various training also comes with pay increases.

Both full-time and part-time positions are available, **Smith** said. Interested applicants can apply online through Chathamcounty.org or even call the county manager's office at 912-652-7869. "I will make sure they get to talk to someone who can talk about the job, what it entails, about county benefits, about salaries. We're trying to take a proactive stance to get people to apply and to come in because they're also good jobs," **Smith** said. "I know they're challenging, but it's not all bad. They've got a great family out there. They're very close, they're very supportive of each other. You have to be in those stressful times. You know, sometimes somebody needs a hug."

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

Savannah Morning News (GA)
June 15, 2021

Residents split when it comes to possible fire fee

Author: Katie Nussbaum

Lack of payment by nearly one-third of property owners served by Chatham Fire in unincorporated Chatham County has led the organization to turn to the Chatham County Commission for a solution. Now as the commission works to remedy the problem, a survey shows that many residents are split when it comes to determining the next step.

Active during December and January, the survey garnered about 1,100 participants who responded to questions about overall confidence in their service providers, service usage, cost and the possibility of having the cost included on county tax bills.

"I really did think the survey results would be sided a little more on some of the issues, but they really were not," said Chatham County Manager **Lee Smith**.

When it comes to the possibility of having the county add the cost of fire protection services onto tax bills, 479 people were in favor while 504 people were against the idea. The remainder of the respondents, 202 people, didn't answer the question.

There was a similar split on the issue of the county creating its own fire department to serve the unincorporated areas. There were 376 people in favor of the idea and 466 people against it. The formation of a county fire department would be the most costly option for the county.

The county began exploring the different options after Chatham Fire and several other departments that service for unincorporated parts of the county brought attention to budget shortfalls due to lack of payment from subscribers.

Chatham County Commission Chairman Chester Ellis said finding a solution is a work in progress. "Right now we have to take a pause from all of it because we have to finish the (county) budget by the end of this month, so the budget hearings are going to take up 99% of our time," he said.

Aside from including costs on tax bills or creating a county fire department, other options include enacting an ordinance to require that property owners in the unincorporated area subscribe to the department that services their district. They could also leave the current process in place, or a go forward with a Special Service District tax increase, which would be based on property value and wouldn't be able to be capped.

The majority of people surveyed said they paid their fire services subscription fee, but 60 people answered that they did not. Another 75 opted not to answer the question.

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

Smith said the results are likely a little skewed. "I do believe, and this is conjecture on my part, they would be afraid to say, 'no,' could we track it. In fact somebody asked me about that, could we see who they are?," **Smith** said, adding that the county could not track survey participants.

While the survey provides a snapshot of the issue, there is no doubt that the number of non-paying customers is well into the thousands. After switching software last year Chatham Fire found that about 10,000 of the 34,576 properties Chatham Fire services aren't opting into the subscription.

The Pooler fire department covers about 30 square miles, three of which are in unincorporated Chatham County and include 765 homes. Less than 200 paid the subscription fee last year, Chief Wade Simmons told the commission in December.

While nearly 300 people didn't answer the question, 601 respondents said they felt that fire protection services should still be provided even if the subscription isn't paid. "We don't have, as a county, a legal requirement, but I think we have a moral obligation to make sure people are protected," **Smith** said.

The majority of those who responded, 854 participants, are served by Chatham Fire; 241 by Isle of Hope Fire Department and 31 by the City of Pooler Fire Department.

In total there are nine departments that provide fire services to unincorporated areas of Chatham County. Chatham Fire, which is a nonprofit and Isle of Hope is a volunteer department. The remaining seven are operated by municipalities: Bloomingdale, Garden City, Pooler, Port Wentworth, Savannah, Tybee Island and Thunderbolt.

More than 700 respondents felt that their current level of protection met the needs of their household and were 'very confident' when it came to their confidence in their fire service provider.

Smith said the fix isn't an easy or simple one and they must work together with the providers to find a solution. "We're going to crawl a little bit, stand up and walk and if we need to sprint we will, but this isn't a marathon. We need to take our time and figure out how to help them stand up a healthy budget," he said.

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

Savannah Morning News (GA)
February 12, 2020

New dental clinic gives kids a reason to smile

Author: Mary Landers

Thirteen-month-old Jackson Smalley doesn't have all his teeth yet, but he's no stranger to the dentist. On Monday, Feb. 10, he settled into his mom's lap in an exam chair at the new pediatric dental clinic at the Chatham County Health Department, watching dentist Deb Smith as calmly as if she were a Peppa Pig cartoon. "You are doing so good," Smith told him as she took a photo inside his mouth. Getting kids in early is important because tooth decay is a transmissible disease. "Babies are born without cavity-causing bacteria in their mouth and parents need to know how to prevent the transfer of the cavity-causing bacteria," Smith said. "We are advocates of the first dental visit as soon as the first tooth erupts, no later than the age of one year."

Jackson's mom, Cassidy Smalley, had taken him to this clinic once before. "I was at a WIC appointment and they told me he's old enough to go to the dentist now," Smalley said, referring to the Women Infant and Children nutrition program. "And we have one here." She brought Jackson back Monday to make sure a swollen area in his mouth was nothing to worry about. Smith examined the area on the photo. A new tooth was clearly visibly, almost pushing through his gums. "I want to see him again in 30 days," Smith said. I want to see the area again once the tooth comes in. I think it'll be gone but it's always good to check."

Providing regular dental care for children can improve their overall health, school performance, even improve eventual job opportunities, officials noted at the grand opening of this three-chair clinic at department's main building on Eisenhower Drive. The clinic has been open since May but not widely advertised. The clinic's installation cost about \$500,000. Its annual budget is \$370,000. The need is big. "If you talk to school nurses, students are rampant with dental health problems," said Dr. Lawton Davis, district health director. "I started with public health 22 years ago and it's been the biggest unaddressed clinical need that I've seen." A survey of area dentists indicated only 28% of them accept at least one of the five Medicaid dental plans, Smith said. But those same dentists may not be accepting new patients or may limit the number of Medicaid patients they see. Savannah dentist Felix Maher, who has long advocated for and helped provide free and low cost dental care, said patients come from as far away as Baxley for the free weekly clinic at Savannah Tech, held on Fridays.

The consequences of poor dental health are far-reaching, including cardiac issues, said County Manager **Lee Smith**, who recounted that the Sheriff's Office has taken inmates with these complications to the emergency room. "So people don't understand the extent of it," he said. "They're like 'well you'll lose a tooth;' no you'll lose your life over an abscess." The county will consider expanding the clinic to other locations based on the experience with this pilot program, **Lee Smith** said.

Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)

Savannah Morning News
June 24, 2019

Chatham County prepares for 2020 census

Author: DeAnn Komanecy

Chatham County Manager **Lee Smith** told commissioners on June 14 the upcoming U.S. Census is going to present some challenges. "We are really going to have to go out there and beat the bushes to make sure the count is accurate," **Smith** said.

Population totals from the census are used in a number of ways, including determining federal dollars provided to communities. The population numbers are also used to determine how many seats each state has in the U.S. House of Representatives. They are also used for redistricting at the state and local levels. Georgia gained one seat from the last census in 2010.

To help make sure Chatham County gets an accurate count, commissioners approved a resolution on June 14 to create a complete count committee. Complete count committees have been recommended nation-wide to maximize participation.

Smith said the committee's role will be educational. **Smith** noted the 2020 census has a big difference from the 2010 count. "It's totally electronic," **Smith** said. "There will be no paper." **Smith** said that will make this count "tough."

The U.S. Census Bureau states on their website that 95% of households will receive an invitation to participate in the census by mail, with about 5% getting the invitation by a census worker.

The invitation will include information on responding online. In areas that are deemed less likely to respond online, the invitation will include a paper response form. "A lot of people aren't going to know that," **Smith** said. "We have to get the word out."

Residents will also be allowed to respond by phone. **Smith** said the cost of the committee's work will be shared and billed to each municipality based on current population numbers. **Smith** said the committee will be reaching out through advertising, clubs, churches, groups, libraries and news stories to educate the public about the census.

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

Savannah Morning News (GA)
June 24, 2019

Stranded veteran prompts new 911 protocols for Chatham County

Author: Tandra Smith

The Chatham County Police and Sheriff's Department now has new protocols put into place regarding 911 calls after a man was stranded for hours on Interstate 95.

As of noon Monday, all calls made to the Chatham County 911 Communications Center where an incident involving a locked car poses a major safety concern will have an officer dispatched to them. This includes, but is not limited to, being stranded on a major thoroughfare or having a child or animal locked in the car.

The changes come after a woman called the center Saturday about a man being stranded on the interstate. The Navy veteran, only identified by the name of Paul on a Facebook post by Lisa Quanstrum, was sitting on the side of the road after locking his cell phone, contacts and other personal items in his car.

According to Quanstrum's post, Paul had been on the side of the road for close to two hours before she stopped to help him. Quanstrum called 911 and was informed that nobody would be able to come out and help the stranded man because it would be a liability to unlock car doors for individuals, according to her Facebook post.

Lee Smith, county manager, confirmed that they did receive calls about the stranded man in a press conference Monday. **Smith** said that an agency was not dispatched because the man was located outside of their jurisdiction, Port Wentworth's, to be exact.

Though **Smith** wishes that more information, particularly medical, was communicated more clearly, he said that he really faults no one in this situation. **Smith** said the lack of a response was a combination of where they were and the protocols not being what they should have been.

Smith also said that the changing of the protocols would have occurred whether or not the Quanstrum's Facebook post had gone viral or not. "If we get one call on something, we have it investigated," **Smith** said. "We don't work for ourselves here; we work for our citizens and for 15 million visitors and people that pass through."

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

Savannah Morning News (GA)
May 25, 2019

No tax hike in county draft budget

Author: DeAnn Komanecy

No tax rate increases are recommended in the fiscal year 2019-2020 Chatham County budget presented to commissioners for a first look at their regular meeting on Friday.

County Manager **Lee Smith** said the budget was planned using the current millage rate of 11.543 mills in the general fund and 4.99 mills in the special service district, which covers services the county provides in the unincorporated areas including police, public works, engineering, and building safety. The budget for the general fund is listed at \$203 million and \$36 million for the SSD. Commissioners will be meeting one on one with **Smith** and county staff to review the budget before a public hearing is held on June 14. The budget will be adopted on June 28.

The general fund budget proposal includes an almost 7 percent increase. The SSD budget would increase by almost 5 percent. Some highlights in the recommended budget include 21 new full-time and two new part-time positions along with 20 reclassifications and four salary adjustments.

Smith said five of the positions are to create a new department, juvenile indigent defense. The new department will be supervised by the county's indigent defense department head and will use county staff and contract attorneys.

The change is being made due to the high costs associated with indigent defense in Juvenile Court, **Smith** said. Probate Court will have two part-time positions changed to full-time, if the budget as written is approved. The county also plans to set aside \$1 million to use for debt service on the new Trial Court facility.

The new courthouse is estimated to cost \$80 million. The court is in the design phase which should be complete in early 2020. Phase 1, to demolish the old county jail to make way for the building is complete. The site is located at Montgomery Street next to the existing courthouse. The building will provide eight courtrooms for the Superior Court, four for the State Court, a jury selection room and administrative space for judges and staff.

Special Local Option Sales Tax funds from the upcoming SPLOST VII include \$50 million for the new courthouse. Voters will decide whether to approve the one cent sales tax in November. During the upcoming year, county staff will work on developing requests for proposals for the project and finance options. The county also plans on securing a canal clearing contract, estimated at \$250,000 to help Public Works in maintaining the drainage system. A \$250,000 mowing contract for roadways is also planned.

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

Savannah Morning News (GA)
January 31, 2019

Public libraries' fiber internet service a bargain

Author: Ann Meyer

Three counties worked together to make a new fiber-network internet a reality for Live Oak Public Libraries' 16 locations at a minuscule cost to local residents. Live Oak Public Libraries, which is largely supported by the three counties it serves - Chatham, Effingham and Liberty - is paying just \$6,500 for the year for the new Comcast Metro Ethernet high-speed service, which was officially unveiled Wednesday. The new service has a total price of \$84,000 per year, but the federal E-rate program is providing \$67,000. Grants from the Georgia Public Library Service are covering about \$10,000 of the cost, said Tom Sloan, executive director of the Live Oak Public Libraries. The cost of Live Oak's internet service previously was \$35,000 per year, which also was subsidized by the E-rate program, he said.

'A great investment'

"The high speed internet is just making us more competitive as a region," said **Lee Smith**, county manager of Chatham County. "I'm just thrilled. It's a great investment." The \$6,500 per year Live Oak is paying now after subsidies amounts to \$33 per month per branch if divided evenly among the locations. "It is shocking, especially if you take the number and break it down to per library," said Derek Kolb, director of IT for Live Oak Public Libraries.

The federal E-rate program, which is subsidizing most of the cost based on the level of poverty in the area, receives funds from the Universal Service Fund, the Savannah Morning News reported Jan. 30. The fund generates revenue from telecommunications companies based on a percentage of their end-user revenues, and most pass on this cost to their consumer customers.

Live Oak Public Libraries had the Comcast Metro Ethernet service on its wish list for about two years, Kolb said. With the new service, Live Oak's ability to connect the 16 branch locations has improved, he said. "This particular piece is a foundation piece for the library. It supports everything," Kolb said, from checking out books to managing the libraries' email accounts. Live Oak provides about 357,000 computer sessions and about 95,000 WiFi sessions per year to the public. Each branch is directly connected to the Comcast fiber network and most of Live Oak's internal systems that keep track of its holdings and operations data use internet cloud storage. "Everything's been migrated to the cloud. That's our lifeline," Kolb said, so improved reliability will improve the library's customer service overall.

Critical to patrons

In Effingham County, the faster system is expected to be a "critical component" to the library's service, said Becky Long, chair of the Effingham County Library Board. "Our folks still use books. For the computers, they stand in line. They're heavily used," she said. The new fiber

Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)

network will improve internet service reliability, as well, Kolb said. "Patrons may not see that, but they do experience redundancy when there are less outages and less interruptions of service," Kolb said. The Comcast Metro Ethernet network is deployed on fiber and is capable of providing 100 gigabytes per second, which is the highest speed available, said Mike Thibodeaux, senior director of enterprise sales at Comcast. It's also more reliable. "This isn't the coffee shop's system," Thibodeaux said.

The new internet service has redundant routes that provide a backup within the Comcast system so if part of the fiber was interrupted, the service would continue to run. This reduces the likelihood of an internet outage at Live Oak, Thibodeaux said. The service does rely on the libraries' electrical systems, however, he said. In the event of a hurricane with a power outage, the system wouldn't operate, but Comcast hotspots in Savannah would provide service, Thibodeaux said. By using fiber, the system will better resist corrosion, which can lead to outages. "It's not susceptible to water," Thibodeaux said.

While the typical library visitor might not notice a difference when they open a laptop or browser on their smartphone, the system provides the capability to download files at much faster speeds. As the libraries require a faster speed, the new system can provide it, Thibodeaux said. Sloan, Live Oak libraries' executive director, said the Bull Street location was using a speed of 300 megabits per second on Wednesday. "One of the things we're able to do is really monitor the use of the service. It's scalable and it can grow as our demand grows."

A public service

Smith, who as Chatham County manager serves on a Live Oak Public Libraries advisory board, said the libraries' faster internet provides a public service. "My board sees the library as an extension of education." From students to the underemployed looking for work or studying for the GED, free internet service at Live Oak Public Libraries is important to Chatham County, **Smith** said.

Smith said his daughter attends the Armstrong campus of Georgia Southern and often studies at the Oglethorpe Mall library. She goes there to avoid distractions, he said. "She says, 'I get my papers done. I get my reports done,'" he said. For people who don't have internet at home, the libraries help to level the playing field by providing access to online classes, job applications and online resources. "Our goal is to make people self-sufficient," **Smith** said. "People want to have pride. They want to be able to support themselves," **Smith** said. Most people don't want to be on public assistance, he said. "They want more for their kids. They want more for their lives." The county managers of the three counties that support Live Oak Public Libraries will be following up on the internet service, **Smith** said. "All three counties are asking for outcomes. That's fair. My board has to be able to say this is what you got for your dollar."

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

Savannah Morning News (GA)
September 21, 2018

Chatham County receives national award for branding of Chatham County Police Department

Author: Staff Member

On Sept. 6, the Chatham County Public Information Office accepted the City, County, Communications and Marketing Association Silver Circle award at the Savvy Awards in Milwaukee, WI. Chatham County was a finalist in the new logo, artwork and branding campaign category for the branding of the Chatham County Police Department, said spokeswoman Catherine Glasby.

"I am so proud of my Public Information Team, especially Abby Murphy who created all the logos and artwork," she said. "While the Silver Circle award is a 2nd place award, it shows the depth of talent that we have on this team. The winner of the Savvy Award was Clark County Water Reclamation, NV (Las Vegas). Clark County worked with a marketing company and we did everything in house."

Chatham County competed against a number of communities in this category, according to Glasby.

At Friday's county commission meeting, County Manager **Lee Smith** commended team members for their hard work.

"In 2018, the County has received national awards from organizations like the Association County Commissioners of Georgia , National Association of Counties , Government Social Media Organization, Facebook and now 3CMA," he said. "It shows the dedication of Team Chatham to deliver high quality services to our citizens. I am very proud of all the members of Team Chatham for their accomplishments."

Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)

Savannah Morning News (GA)
June 8, 2018

Chatham doubles dry trash fee
Author: Eric Curl

Chatham County is planning on maintaining the existing property tax rate, but residents of the unincorporated county will have to pay double to have their yard waste and bulk items picked up. After his predecessor, Russ Abolt, made failed attempts to implement a similar increase for years, County Manager **Lee Smith**, who took the job in 2014, managed to convince the majority of the Chatham County Commission to raise the annual fee charged for dry-trash collection from \$43 to \$85. On Friday, County Chairman Al Scott joined commissioners James Holmes, Tabitha Odell, Jay Jones and Chester Ellis in approving the increase that **Smith** and Finance Director Amy Davis said was needed to cover most of the costs of the \$2.4 million operation, which includes weekly curbside yard waste collection and monthly bulk item pickup.

A solid waste management fee to use the landfill was also increased by state legislators from \$1 to \$2.50 per ton. Some of the \$1.6 million in additional revenue generated by the landfill fee will be used to cover annual depreciation costs of about \$255,983 needed to replace about \$4 million worth of aging equipment and vehicles, under the approved plan. "Public works was cut so deeply back in 2007 and 2008 that they never caught up," **Smith** said.

Commissioners Patrick Farrell, Dean Kicklighter and Helen Stone voted against the changes after raising concerns about the need for the increase and the impact on residents. Farrell said the county had increased property taxes in previous years and police costs are down after Chatham split from the city in February to form a stand alone department. "I don't see the case for raising it," he said. "I see the case that we reduce it from \$43 to zero personally." The dry trash fee had been increased to \$173 last year to recover the costs of removing debris from Tropical Storm Hermine and Hurricane Matthew the previous fall, but the \$130 increase was to be a temporary measure to restore the reserve funds used for the cleanup.

Kicklighter had suggested using reserve funds to cover the costs of the dry-trash service and equipment since the county now had enough to cover more than three-months of operations, while two months is what is generally recommended. "I think we need to try not putting the fee on the citizens," he said. "Use some of the reserves, buy the capital improvements and see how it shakes out next year." But Ellis and Holmes both said that the three-month reserve amount, which was agreed to as a goal of the commission's, was needed to prepare for more storms. "We need to look at our immediate past," Ellis said. "If we have one, two or more hurricanes like we had with Matthew and Irma, we are going to wind up spending \$30 million up front." The fee increase was approved as part of a revised revenue ordinance for the 2018-2019 fiscal year, which begins in July. The proposed budget maintains the existing property tax rate for the county and Special Service District, which pays for services provided outside Chatham's municipalities. The commission is expected to adopt the budget on June 22.

Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)

Savannah Morning News
June 3, 2018

City, county spar over Truman Parkway
Author: Eric Curl

City Manager Rob Hernandez refused Chatham County's request to have the city take responsibility for maintaining the entire Truman Parkway last fall after Chatham County Commissioners approved \$259,180 in repairs with the understanding the road would be taken over by the city. "Operating and maintaining expressways such as this will bankrupt us," Hernandez wrote to county officials in October. "The only way I would consider accepting full responsibility of the roadway is if we put a tollway in place. We can jointly talk to the state tollway authority if you like."

Hernandez said last week that he never seriously entertained the idea of using toll revenue for Truman's maintenance and the idea was quickly dismissed by the city's attorney since the city has no authority to charge tolls. But the city is incapable of maintaining the parkway and its many bridges for the long-term and he is now looking at having the state take over maintenance responsibilities, Hernandez said. However, the Georgia Department of Transportation is under mandate to not increase the number of roadways in its inventory and if it wants to add a highway it must lose a highway, he said. As a result, Hernandez said the city would have to take over stretches of another state road as a trade off and he is considering portions of Ga. 204 and 37th Street that would be less costly to maintain.

In the meantime, the city has been negotiating with county officials to have Chatham commit to maintaining of the final three phases of the Truman stretching from DeRenne Avenue to Ga 204/Abercorn Extension.

There is disagreement as to the status of the talks, however.

In March, County Manager **Lee Smith** sent Hernandez a letter outlining the agreement putting Chatham in charge of maintaining final three phases, which he asked the city manager to sign if he agreed with the terms. The maintenance would be any activity required of the roadway, including mowing, patching, striping and signage, **Smith** wrote.

Hernandez in return sent his own letter describing the terms. Maintenance would include mowing, litter control, roadway repairs, signage and paving, Hernandez wrote.

It is the city's understanding that the agreement is now in place, Hernandez said last week. However, it is **Smith's** opinion that the only agreement in place dates back to 1997, when the city agreed to maintain the first two phases of the parkway, county spokesperson Catherine Glasby said last week. "It was discussed in the letters between **Mr. Smith** and Mr. Hernandez but no agreement was finalized or signed," Glasby said.

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

Road work

The county has been making repairs to the parkway with the expectation the city would take over the road, according to government records and correspondence obtained by the Savannah Morning News in an open records request.

Repairs to the parkway's third phase that had been requested by the city were set to be completed last November, according to an email County Engineer Leon Davenport sent to city officials in October. Davenport sought in the email to find out when the city would inspect the parkway for acceptance. "If there are any deficiencies in the work in your staff's opinion we would like to know that as soon as possible so that we can address," Davenport wrote.

Last June, the Chatham County Commission approved a \$259,180 with E&D Contracting Services to make the repairs after being informed by staff that the section of Truman Parkway would be conveyed to the city once the project was completed.

The project included shoulder repair, erosion stabilization and the replacement of the concrete slope under the bridge over DeRenne Avenue, according to county officials. "The City of Savannah walked the entire Phase 3 section of the roadway (DeRenne to Wheaton) with staff to point out any issues they wanted corrected before acceptance," Davenport said in an email Tuesday. "All items were completed."

In his October email, Hernandez informed Davenport and **Smith** that he did not intend on accepting responsibility of the parkway. "It is my belief that the county plays a major role in transportation planning, operations and maintenance from a regional perspective and that there are certain roads like the Truman that are more appropriately provided for by the county since they provide a regional benefit," he wrote.

The city would continue being responsible for the first two phases of the Truman as dictated by the original agreement, Hernandez said.

Hernandez has also suggested in an April 28 letter to **Smith** that they should look at incorporating the roadway under the State Road and Tollway Authority or creating an independent expressway authority to maintain the parkway.

The State Road and Tollway Authority does not just manage tollways, but also manages other roadways across the state and offers various programs to fund roadway projects, according to city spokesperson Michelle Gavin. Those funding programs - not tollways - were what the city manager was referring to in his April memo to the county Manager, Gavin said.

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

Savannah Morning News (GA)
December 30, 2017

**CHATHAM DOWNPLAYS POTENTIAL LANDFILL RELEASES - ARSENIC,
COBALT FOUND AT CHEVIS ROAD, SHARON PARK**

Author: Mary Landers

Routine monitoring of two Chatham County landfills has raised a concern about heavy metals leaking into groundwater at Chevis Road and Sharon Park.

Chatham County advertised its findings as public notices in the Savannah Morning News in early November. "Arsenic has been detected in groundwater at levels significantly above background concentrations and above Georgia EPD-approved groundwater protection standards," the notice for Chevis Road Landfill reads.

"Metals have been detected in groundwater at levels statistically significant above background concentrations and above Georgia EPD-approved groundwater protection standards," the notice for Sharon Park Road Landfill reads.

The metals detected at Sharon Park were arsenic and cobalt, with readings of up to five times the limit for arsenic there.

Chatham County Manager **Lee Smith** said the county doesn't see a public health concern because elevated levels of either metals were detected in only two of a dozen monitoring wells at Chevis and two of 14 such wells at Sharon Park. The county's environmental consultant at both sites since 2008, Advanced Environmental Management, wrote in its report for Chevis Road Landfill that "Arsenic appears to be naturally occurring in the soils at this facility" and that "turbidity is at least partially influencing arsenic detections."

AEM is "ascertaining where to put additional wells" to determine where the contamination is coming from at both sites. "If it is the landfill then mitigation will be required," **Smith** said.

The Georgia Environmental Protection Division's Jeff Cown said last month his agency had not yet confirmed the release, despite the fact that the sampling occurred in March. EPD confirmation is what triggers the requirement for the public notice. Like **Smith** and AEM, he noted there are high levels of naturally occurring arsenic in Chatham County. "We want to inform the public. We don't want to scare the public," said Cown, chief of the land protection branch for the Georgia EPD.

The public notification requirement came about with a 2016 law requiring landfills to notify local authorities of the release of contaminants "dangerous to human health." The legislation was prompted by the releases at Broadhurst Landfill in Jesup where large quantities of coal ash were shipped in and local residents didn't know about the releases from the landfill until well after the fact.

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

The law requires municipal solid waste landfills to notify local governing authorities of the city and county where the landfill is located if there is a release of a contaminant that is likely to pose a danger to human health. It doesn't specify which contaminants fall into that category. The law also requires notice in a local newspaper within 14 days of "confirmation of the release by EPD."

Smith said that while the lack of that EPD confirmation meant the county was not obligated to publish the notice he wanted to do so to be proactive. "We are getting ahead of the curve so we don't wait six to nine months for this to be exacerbated," he said.

Smith said the new law was meant to target coal ash but has unintended consequences for other landfills. He expects to see changes to the law in the upcoming legislative session.

But Altamaha Riverkeeper Jen Hilburn called for continued notification. "This is another of many examples of leaks of toxic heavy metals from improperly stored contaminants. With coal ash being moved around for proper storage we must move towards placing all contaminants, coal ash and more, in lined and capped facilities away from our waterways," said Altamaha Riverkeeper Jen Hilburn. "A little arsenic here, a little thallium there, a little toxaphene here a little benzene there....when contaminants are regularly leaking at statistically significant levels, we all suffer as these pile up in our rivers, in our drinking water supply. Death by a thousand cuts is still death."

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

Savannah Morning News (GA)
October 28, 2017

**JAIL GETS LAST-MINUTE HEALTH CONTRACT \ SHERIFF, COMMISSION
CHAIRMAN HAMMER OUT DEAL FEW HOURS BEFORE ITS EXPIRATION**

Author: Kelly Quimby

With just hours left to go before it was set to vacate the facility, Atlanta-based inmate health services provider CorrectHealth was awarded a contract Friday to continue providing health care at the Chatham County jail.

On Friday afternoon, Sheriff John Wilcher reported that he was able to work with Chatham County Commission Chairman Al Scott to draw up the extended contract with the company, which will continue through the June 30, 2018, end of the current fiscal year. Wilcher said he hand delivered the document to the chairman just before 4 p.m.

The sheriff said now that the contract is in place, county staff will be posting a request for proposals for inmate health services and take bids for Fiscal Year 2019, which starts July 1, 2018. "It's just a continuation of the contract, it's the same rate as the old contract," the chairman confirmed Friday. He added the document will also have to be approved by the rest of the commission.

Assuming the contract is confirmed by the other commissioners, Friday's agreement with CorrectHealth brings to an end a dramatic series of negotiations over inmate health care at the Chatham County jail.

In a summary of the talks provided to the commission last week, County Manager **Lee Smith** said Chatham staffers kicked off the renegotiation efforts with CorrectHealth early this year, and that they continued even after the county commission voted to enter into a new contract with the company on Oct. 6.

But by the following week, **Smith** said, he made an executive decision not to renew the company's contract based on a "lack of response, budget and impending deadlines, but more importantly the legal requirements to ensure health care at the detention center."

Smith wrote that he immediately contacted representatives of Vienna, Va.-based Centurion Inc., to see if they could take up the contract on an emergency basis until the county could re-advertise the service and select a new inmate health services provider. The company indicated that it could, and the county commission narrowly approved the emergency contract at its meeting Oct. 20.

Even with that approval, however, it was unclear in the days leading up to Friday's down-to-the-wire contract whether Chatham County officials would have a company in place to provide health care to inmates at week's end.

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

Although the Chatham County Commission vote was for Centurion to take up health care services beginning today, a series of letters sent back and forth in the days after that vote indicated that, despite its best efforts, the new company would not be in place by the time CorrectHealth had vacated.

In a Tuesday letter to the commission and the sheriff, **Smith** wrote that he had requested that CorrectHealth remain in place through mid-November to assist in the transition, but CorrectHealth President Dr. Carlo Musso firmly declined.

Musso wrote, in a letter sent in response to **Smith's** request, that the county manager had misrepresented to the county commission the facts about previous efforts to come to new terms over his contract with the county, and he was unwilling to continue his contract past Oct. 27.

"When I initially read your request to extend our contract, I was inclined to agree to continue to provide services, as long as necessary, given the prevailing interests of the health care needs of the inmates at the CCDC and the needs of the Sheriff's Office," Musso wrote.

"We are simply unable and unwilling to extend our relationship with Chatham County, as you have repeatedly and unnecessarily disparaged our reputation and the quality health care services we provide. We simply have no trust in the honesty or integrity of your office. Our last day will remain Oct. 27, 2017 for which full payment will be demanded."

County spokeswoman Catherine Glasby did not respond to repeated requests for comment on the charges levied by agents of CorrectHealth or on the status of the inmate health care contract this week.

The sheriff, however, said the new contract with CorrectHealth is basically an extension of the company's previous contract at a monthly cost of just less than \$600,000. And unlike the previous contract, which was between the Chatham County Commission and CorrectHealth, Wilcher said the new version also includes him. "The chairman and I ... sat down and came to an agreement," Wilcher said. "It's the same contract from last year. Everything should go status quo. I'm happy with it."

Moving forward, the sheriff said CorrectHealth has agreed to pursue accreditation under the National Commission on Correctional Health Care, a designation he expects they'll receive by April.

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

Savannah Morning News (GA)
September 21, 2017

COUNTY APPROVES PURCHASES TOWARD NEW POLICE DEPARTMENT\ - NEW POLICE CARS, SALARIES ON DOCKET FOR FRIDAY'S COMMISSION MEETING

Author: Kelly Quimby

Chatham County staffers have gotten the green light to make the purchases and hires necessary to reestablish a standalone county police department. And based on some of the expenses already incurred, it would no longer be feasible for Chatham officials to continue to negotiate with their counterparts at the city of Savannah to maintain a joint Savannah-Chatham police department, County Manager **Lee Smith** said in a telephone interview Wednesday.

To meet the Feb. 1, 2018, deadline set by the Savannah City Council in a July vote to dissolve the Savannah-Chatham police department, the county commission has already agreed to make purchases that, if the merged department were to be salvaged, would no longer be usable, **Smith** said. In addition, the county manager said, staffers have received bids for other equipment and services, and completed the design of the official seal and badge for the reformed Chatham County Police Department.

"I've been giving marching orders," **Smith** said. "We've already sought bids for uniforms, we've chosen the badges, the seals, the colors of the uniforms (and) the car decals. We've got the bids back for weapons we have to purchase - guns, tasers - so we'll be bringing those budget amendments. You'll probably see them at every (commission) meeting or every other meeting from now until winter."

One of those budget requests is going before the commission Friday. Staffers are recommending that commissioners approve the purchase of 20 new Ford Explorer Police Interceptors from Hardeeville, S.C.-based O.C. Welch Ford-Lincoln at a cost of \$538,500. In a memo submitted to the commission along with its agenda for Friday's meeting, Fleet Operations Director Calvin Turner said he was suggesting the purchase because the county police department has "an immediate need for police pursuit vehicles to establish and handle patrolling the unincorporated areas of Chatham County."

"In order to have the vehicles ready to patrol, Staff contacted several Ford dealerships to obtain pricing information and availability," Turner wrote. "O.C. Welch confirmed to staff that he has six ... vehicles on the lot which are available for immediate delivery and is expecting the balance to be shipped any day."

If approved by the commission Friday, the vehicles would be added to the growing tab for the county police department.

The commission on Sept. 8 approved the purchase of a new phone system and radios for the Chatham County Police Department at a combined cost of more than \$400,000. The board

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

also voted earlier this month to amend its budget for police services and create three new information and communication services positions for the police department. According to a budget amendment on the agenda for Friday's meeting, those ICS positions are expected to cost \$247,900 in the current fiscal year.

In the meantime, staffers reported at the commission's meeting two weeks ago that more than 100 applications for various positions in the department had been received and return offers had been extended to the 29 officers on the county retirement plan who now work for the Savannah-Chatham department. And **Smith** said Wednesday the search firm Stanton Chase has already begun interviewing candidates from across the state and nation to lead the department as chief.

"This is a big deal," he said. "It sounds very easy to do this, but there are parts that are very complicated, like getting a chief on this fall and two assistant chiefs. ... (But) since the city gave us the February deadline it's what we have to do."

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

Savannah Morning News (GA)
February 1, 2017

UNCLAIMED HUMAN REMAINS: LET THEM REST IN PEACE

Author: Opinion

Chatham County Coroner Bill Wessinger calls it unacceptable - the fact that the cremated remains of about 275 people are stashed in an office storage room in midtown Savannah.

He's right and more. This storage process is also disrespectful and shows a callous disregard for the sanctity of life, as each of these boxes of ashes used to be a living, breathing human being - someone's son or daughter.

To his credit, Dr. Wessinger, a retired surgeon whose life's work was preserving life, and County Manager **Lee Smith** want to humanely correct this intolerable situation. Both officials are working on a plan to establish a county cemetery this spring in southwest Chatham so that the remains of each individual can be given a proper burial and respectful final resting place. "Out of general respect of humanity, we need to do something," the county manager said.

He's absolutely right.

Indeed, it's deplorable that the county waited so long to act. Apparently, the nondescript white boxes of ashes have been stacking up for years. Each box is numbered and has a name attached. If that's the case, it's possible to wonder if the county could do something to improve the process of tracking down the next of kin.

Dr. Wessinger says his staff exhausts all options, but with so many unclaimed remains, perhaps more can be done.

The county coroner is the official custodian of cremated remains that go unclaimed, possibly for financial or for other reasons. The going rate for funeral, burial and cremation services in Chatham County has been estimated at about \$1,000. In some case, relatives may not be able to afford this cost, or more simply, they may not want any association with the deceased person and refuse to collect their remains.

The saddest reason is that sometimes there's no one to claim the person's remains, as in the case of deceased homeless people or people who spent their last days alone and mostly forgotten in nursing homes until they died. If no one comes forward to claim a body and the decedent had financial assets, those can be used to pay for cremation. The coroner's office picks up the cost when that's not the case, and will release remains to family members who can provide reimbursement.

Dr. Wessinger also cited the beneficence of the hospitals and sometimes the funeral homes to store bodies for a period of time until his office can make a proper disposition. That includes

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

going through the Probate Court judge.

Every person in a civilized society should receive a proper, respectful burial. The county's warehousing of these remains must end, and it's encouraging that it apparently will.

Mr. Smith said he hopes to establish a burial ground, complete with a special memorial to the dead, on a tract of county-owned land in southwest Chatham County. The county manager is hoping that local volunteers would pitch in and help make this plan a reality, which is a fine idea. Residents who are interested in contributing to the project can call the Chatham County Coroner's Office at 912-355-0257 or the Chatham County Manager's Office at 91-652-7869.

It's also to **Mr. Smith's** and Dr. Wessinger's credit that they doesn't want this project to be a kind of afterthought, something that the county is reluctantly doing because it has run out of other options.

"I don't want it to be something - nor does the coroner - that we tuck away in the corner and forget," **Mr. Smith** said. "We want it to be something people can be proud of."

Indeed, as former British prime minister Sir William Gladstone once said, "Show me the manner in which a nation cares for its dead and I will measure with mathematical exactness the tender mercies of its people, their respect for the laws of the land and their loyalty to high ideals."

There's nothing respectful or merciful about keeping someone's remains in an office storage room indefinitely. These former citizens should have a place where they can rest in peace, not rest with all the other cast-off or forgotten everyday items that have been locked away out of sight in an obscure county office.

The coroner says he has no current money in his budget to purchase land or build a mausoleum for the project. Thus the plan to develop a county burial ground shows good financial sense in addition to compassion.

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

Savannah Morning News (GA)
January 29, 2017

COUNTY'S STORM RECOVERY COSTS NOW TOP \$36M \ WORK EXCEEDS 100 DAYS; REMOVAL OF ABOUT 2 MILLION CUBIC YARDS OF DEBRIS LIKELY

Author: Kelly Quimby

Chatham County's budget for Hurricane Matthew is now \$36.6 million, and the county's chief administrator says that number could climb even higher. This latest figure - estimated earlier this month to be the total cost for response, repairs and recovery in unincorporated Chatham since the hurricane brushed the Georgia coast in early October - marks an increase of more than \$7 million since the last time the county amended its hurricane budget in mid-December. It is now well over double what Chatham County officials initially estimated for the hurricane's immediate costs. According to the latest summary of the costs the county government is bearing from Hurricane Matthew, more than \$11.4 million has been spent on storm-related activities so far. Once Chatham County is reimbursed by the Federal Emergency Management Agency, at 75 percent, and by the Georgia Emergency Management and Homeland Security Agency, at 12.5 percent, its remaining 12.5 percent will be about \$4.8 million.

But County Manager **Lee Smith** said it's likely the costs could continue to increase before Chatham County closes the books on Hurricane Matthew. "When all is said and done, I think we will broach \$40 million," **Smith** said in a recent telephone interview. He estimated the county's total share after state and federal reimbursement could be between \$5.5 million and \$5.8 million.

DEBRIS

In an update to the county commission earlier this month, Public Works Director Robert Drewry said Chatham's debris removal contractor, AshBritt, is now making its final passes through neighborhoods in the unincorporated areas. Drewry said the work has now spanned more than 100 days. The projected cost to remove debris from public rights-of-way and private roads now combines to more than \$32.7 million, or about 89 percent of the estimated total cost associated with Hurricane Matthew. Dennis Jones, the director of the Chatham Emergency Management Agency, said the amount of storm debris generated in Chatham County has defied professional methods of estimating the volume of debris a hurricane can create. Predictive models run by the Army Corps of Engineers produced estimates that equated to just a fraction of the county's actual debris count, Jones said. Jones, who was appointed at the start of the year to manage CEMA after serving for about two years as interim director, said the culprit behind these unexpected volumes of debris is Chatham County's dense tree population, which unlike areas more regularly affected by Atlantic storms, had not been thinned out by strong tropical winds over time. "We have just a huge tree canopy in Chatham County," Jones said. "What we've seen in September and October has really been a benefit - to clear out some of the old limbs and old trees that were sort of having a weak root structure. It's part of a clean-out that comes with a normal system. This (debris) just happens to be after years and years of not having a storm here." In his report Jan. 20,

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

Drewry said the debris cleanup will continue for the next couple of weeks, and he urged the public to notify the county of any debris piles AshBritt might've missed. Drewry added that regular dry trash and bulk pickup services have resumed for customers in unincorporated Chatham. "I'm very pleased with the progress," he said. "I think we really did shine both internally and with our contractors."

OVERTIME

Meanwhile, Chatham officials report they racked up more than 5,200 overtime hours on hurricane preparation and response from Oct. 4 through Oct. 21. According to a summary of the county's personnel costs that was submitted to FEMA, the Chatham County employees were averaging more than \$10,000-per-day in overtime costs for the 17-day period - a total cost of more than \$183,000. These costs have been combined with the rest of the county's labor, equipment and materials costs for that two-and-a-half-week period and are expected to reach a collective \$690,000. Overtime has been a huge expense for Chatham County in the current budget year. By mid-January, a little more than halfway through its fiscal year, the Chatham County government had paid nearly \$3 million in overtime to its employees - an amount that far exceeds the \$1.7 million the county budgeted for overtime in all of Fiscal Year 2017, and there's still another five months to go.

The county manager (**Lee Smith**, CB&A Insert) said that while he couldn't immediately provide exact figures, much of the costs are related to the response and recovery from the hurricane, and from Tropical Storm Hermine, which struck the area just a few weeks before Matthew arrived. Because the damage in the case of Hermine wasn't considered enough to warrant a federal disaster declaration, Chatham County was forced to pay the costs to recover from that storm on its own. "Any overtime during Hermine, which is predominantly public works, the sheriff's office and facilities, is totally a county cost," the county manager (**Lee Smith**, CB&A Insert) said. "Anything related to Matthew in the approved time period, we're going to be able to get back 75 percent (from the Federal Emergency Management Agency), plus 12.5 percent (from the Georgia Emergency Management and Homeland Security Agency). We would be responsible for 12.5 percent of that."

In the portion of the county's public works budget funded by taxpayers in the unincorporated county - known in the budget as the special service district - overtime costs had blown past the \$24,000 budget for the fiscal year. By mid-January, nearly \$236,000 had been spent to pay public works employees for overtime work. Drewry said Hermine does bear a lot of the blame for the overages in his department. After the tropical storm hit in early September, Drewry said his staff worked from daylight to dusk, six days a week for about a month to pick up the downed tree limbs, trunks and stumps. And that storm generated only about 30,000 cubic yards of debris. In facilities, overtime by mid-January had exceeded the budget by nearly \$23,000. The sheriff's department was only slightly over budget, about \$7,000 or so, but the county reported to FEMA that law enforcement officers from the Savannah-Chatham police department and the county sheriff's department had earned a combined 1,700 overtime hours responding to Matthew in the first two and a half weeks - about \$52,400 worth.

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

COUNTY PROPERTY

After the costs for debris removal, repairs and improvements to county property have been among the highest expenses Chatham has faced since the hurricane. Work in county-maintained canals, on roads, buildings and other facilities has been projected to cost more than \$2 million. According to the summary of the county's recovery efforts produced this month, the county is projecting the following costs:

- responded to erosion and washouts and removed debris from county-maintained canals, \$1,208,111;
- repaired 360 traffic signs, \$47,650;
- cleaned, back-filled, graded then stabilized rights-of-way along roads, \$92,752;
- shored up the shoulders along the Truman Parkway, \$44,300;
- repaired four county lift stations and one manhole, \$19,150;
- conducted repairs at 14 county parks and related facilities, \$121,290;
- conducted repairs at 18 county buildings, \$59,375;
- conducted repairs at nine libraries, \$25,000;
- and mitigated erosion, repaired bridge washouts and conducted site improvements and mitigation at the McQueen's Island multipurpose trail, \$407,000.

Jones said he met with FEMA representatives on Friday and outlined the county's plans to submit requests for reimbursement. So far, Jones said, the county has submitted four reimbursement worksheets to FEMA, one of which has made it to its final checkpoint for approval. He said the first check is expected in the next 45 days. The county's goal is to submit all of its requests - a total of 18 reimbursement worksheets - by the end of February. But he cautioned that the recovery may go on for quite a bit longer. "Recovery is going to go on for a while because you have repair that needs to take place," Jones said. "Any flood mitigation issues, generally long-term projects, those will go on probably through the summer, maybe even longer in some cases."

Once the final accounting for storm recovery is complete, **Smith** said the county will be setting its sights on preparing for the next big storm. A strong reserve helped Chatham County pay the upfront recovery costs for Hurricane Matthew, he said, but that fund will need to be replenished.

In addition, the county manager said, Chatham is still planning to construct a new headquarters for CEMA and its emergency operations center. "The EOC we have right now is inadequate; it's an old building," **Smith** said. "It worked ... but we've got to look at improving things as far as how the staff operates. We learned a lot from Matthew. The thing that's interesting, if you look at our cost, we broached \$40 million ... (but) this was a minor storm. We in Chatham County have such a dense tree canopy. It could be less, or a lot more (next time)."

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

Savannah Morning News (GA)
December 22, 2016

**CITY MUST WAIT ON COUNTY MONEY FOR POLICE ASSISTANCE \ SAVANNAH
WANTS HELP WITH BODY CAMERAS, MORE OFFICERS, RECRUITMENT**

Author: Eric Curl

The city is going to have to wait before it can get a commitment from Chatham County to split the costs of some planned Savannah-Chatham police investments. As the city finalizes its budget for 2017, City Manager Rob Hernandez and Mayor Eddie DeLoach had attempted Wednesday to secure assurances that the county would help pay for DNA testing services, a local match for grants for body cameras and 18 additional officers, and a digital recruitment campaign to keep the police department fully staffed as applications decline. Also discussed during the meeting was sharing the ongoing costs of storing the video taken by the body cameras, the costs of allowing officers to take home vehicles outside the county, and the overtime costs officers accrued during Hurricane Matthew. FEMA will reimburse 75 percent of the costs, but the rest needs to be allocated between county and city. "There is only so much money I have to provide for services outside city boundaries," Hernandez said.

County Manager **Lee Smith** and County Commission Chairman Al Scott said they were unable to make the commitments at that time, partly because the county is in the middle of its fiscal budget year and the expenses had not been included in the spending plan. Scott said that he was open to including the investments in the county's next budget, which begins in July, although the costs would have to be approved by the commission. Also, Scott said he would like to discuss sharing the costs of the DNA testing services with the county's other municipalities, when the administrators of those governments all meet next month.

Smith said he had concerns about agreeing to the expenses before the completion of a police operations study that is supposed to determine each government's share of costs. That funding formula by Berkshire Advisors is supposed to be finished before the end of April and be retroactive to Jan. 1, 2016, according to the police merger agreement approved earlier this year. The merger agreement calls for a flat budget and there should be no increased costs, **Smith** said. "I'm not saying they are not necessary, but I'm saying if you did it now the city would have to bear the cost," he said.

Hernandez said that the merger agreement leaves room for additional costs, however. "Whenever any party wishes to add services that benefit both parties, they can seek funding assistance from the other party," he said. "That's what we are trying to do here." The city will move forward with paying the grant match for the cameras and officers, as well as the DNA services and advertising campaign, with the hope that the two governments will eventually come to a funding agreement, Hernandez said. The committee decided that the city and county manager, along with the finance department heads of each government, would meet within the next two weeks to discuss the expenses and come back with a recommendation.

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

Savannah Morning News (GA)
August 6, 2016

**FLOOD ORDINANCE ADDITIONS CAUSE CONFUSION\ - HOMEBUILDERS,
COUNTY OFFICIALS WANT MORE TRANSPARENCY AS FEMA TACKLES NEW
RULES**

Author: Kelly Quimby

Chatham County officials and community stakeholders are pressing for transparency and collaboration as a new ordinance for local flood damage prevention moves ahead.

The calls for inclusion this week came after county staffers sent a proposed new flood damage prevention ordinance to the Federal Emergency Management Agency for review. But the document submitted to FEMA was markedly different from a version reviewed by the Chatham County Commission during a first reading of the ordinance on July 29, and that created consternation among community stakeholders - including some members of the Savannah Area Homebuilders Association, one of the original driving forces behind the push to change the ordinance.

Jeff Schofield, an executive officer with the homebuilders association, said Friday he preferred the version of the document acknowledged by the commission during its meeting last week.

Local homebuilders, Realtors and some property owners have complained that the county's existing flood damage prevention ordinance - passed in 2014 - is too restrictive because it doesn't allow for the use of off-site fill in AE flood zones. The unintended result of the 2014 version is that many undeveloped lots in AE flood zones in Chatham County are "unbuildable," the homebuilders argued, because there is no method for allowing for drainage of stormwater off a low-lying property.

That concern was addressed to some extent in the version considered by the commission at first reading last week. In that proposal, builders had more options for using fill dirt, as long as certain criteria were met.

The commission made no comments about that proposal during its first reading last Friday. Commission Chairman Al Scott said at the time that comments would come during the second reading of the document, after the county received comments from FEMA. It was important to get a review from the federal agency, the chairman said, because FEMA sets the standards for communities that participate in the National Flood Insurance Program.

But the version submitted to FEMA less than a week after the first reading was held, while still less restrictive than the existing 2014 version, had tightened up the requirements for the use of fill dirt in AE zones.

County Manager **Lee Smith** said Friday the ordinance transmitted to FEMA was based on the

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

opinions of county staff, FEMA representatives and the homebuilders association during a joint meeting of the three groups last month. The draft read by the county commission last week, he explained, was essentially a stand-in for the board to review until a better version could be drafted.

"We had to put together an ordinance in less than a week," **Smith** said Friday. "That was impossible. We at least went with the model, and adjusted that model from what we've heard. That was the model ordinance and we knew it had to be changed. (And) the board authorized us to make adjustments." **Smith** said he anticipates even more changes to come to the document once FEMA officials return their comments.

At that point, Schofield said, he would like for his organization to be invited to make their own suggestions about the proposal. He said he's requested that the county have another meeting with interested stakeholders to discuss the proposed ordinance before it comes up for second reading.

The stance of the homebuilders association, he said, is they want the development of the new ordinance to be collaborative. "We understand we have to make concessions," Schofield said. "(But) they have to make concessions, too, for the good of the community."

Smith said it no longer appears that the board will hold its second reading of the ordinance at its next meeting, Aug. 12. But once the comments are received from FEMA, they'll be passed on to the commission to review and determine what to do next.

The county manager stressed that at this point, the ordinance remains a "work in progress." "Everybody's got to remember this isn't final," **Smith** said. "We need the board to review, and once the board reviews we'll take action based on what they want to do next. I'm not going to commit to meetings with anyone until we get something back from FEMA. The board is the entity by which this thing gets voted on."

But Commissioner Pat Farrell, for one, said that once the comments from FEMA are received, he'd be willing to hear what the homebuilders have to say. "At the end of the day, it's the commissioners' ordinance," Farrell said Friday. "I'd like to hear from stakeholders, I'd like to hear from staff and make my informed decision of whether it's a good ordinance or not. I'd like to have a good understanding before I vote on something."

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

Savannah Morning News (GA)
February 28, 2016

DA: No crime discovered in alderman's gun buyback effort

Author: Jan Skutch

Chatham County District Attorney Meg Heap says her review of a gun buyback program did not reveal any evidence of "criminal wrongdoing" by Savannah Alderman Van Johnson in connection with a grassroots program here. "Upon review of the GBI investigative report in this matter, I concur with the GBI's assessment that there is no evidence of criminal wrongdoing by Mr. Johnson," Heap said in a one-paragraph letter to GBI officials in Statesboro. Heap's findings, supported by a GBI review she requested last summer, puts to rest a probe of alleged irregularities in the handling of guns from a Savannah gun buyback initiative.

Heap sought the GBI review after discussions with County Manager **Lee Smith**, who made a formal request for a "criminal investigation into the allegation" involving the nonprofit Savannah Youth City Inc. "gun buyback program, process of buyback, securing of firearms, etc." The request, and Heap's conclusion, were sent to GBI Agent-in-Charge Bill Bodrey in Statesboro.

Johnson said Tuesday that his intentions "were clear and they were pure and within the confines of the law. "We have a significant problem in our community that guns are being used by people who should not have them," he said. "They need to get rid of them. ... The most important thing is to get the guns off the streets before they hurt someone."

"I'm still collecting them," Johnson said in what he called "a direct attempt to be able to get some of these guns off our streets." **Smith's** request identified "circumstances surrounding the surrendered firearms collected by Savannah City Youth Inc.'s program."

"The firearms were surrendered to Chatham-Savannah Counter Narcotics Team to be secured while the matter is being investigated."

"We're doing safekeeping," **Smith** said during a news conference. "We had concerns about it, and I had gotten calls in my office. I had worked with CNT and said to them, I think for the safety of the public, the best thing that could happen ... (was that) CNT hold those (and) inventory them."

Johnson announced the gun buyback program in late November 2016, in concert with the nonprofit. He called it a local gun effort to prevent local gun violence in Savannah and unincorporated Chatham County where there were 280 aggravated assaults with a gun in 2016.

That same year, the Savannah-Chatham police recovered 1,092 guns, according to department officials. "Each one of those guns represents a minimum of one life that can be taken if it's in the wrong hands," Johnson said at the time.

Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)

Savannah Morning News
December 5, 2015

**CHATHAM SELLS WATER SYSTEM\ - \$6.9M WILL HELP STAVE OFF
BANKRUPTCY, HELP WITH REPAIRS**

Author: Kelly Quimby

Chatham County has put an end to its public water system. In an 8-1 vote Friday, the Chatham County Commission approved a purchase agreement with Savannah-based Water Utility Management, doing business as Chatham Water Utility, for the majority of the water system - all but the systems at Little Neck Road and Modena Island.

The private company will buy the system for about \$6.9 million. The agreement also sets the company up to manage the county's sewer system for about 10 percent of its revenues. The county was unable to sell the sewer system because the city of Savannah treats wastewater from unincorporated Chatham and won't accept it from a private vendor.

With the cash from the water system's sale, the county intends to make repairs to the sewer system, which County Manager **Lee Smith** said is decades behind on its maintenance schedule. **Smith** has said Chatham's water/sewer fund has been operating at a loss for years and would have gone bankrupt within the next two years.

The contract requires Water Utility Management to offer positions to county staff affected by the sale and to maintain current rates for three years. But the contract also left some unknowns.

Commissioners Dean Kicklighter and Helen Stone pointed out that with the sale, the cities of Savannah and Pooler, which have provided a backup water supply for customers of the Runaway Point and Hunter's Ridge systems, will no longer do so. "It's just a concern that I have if we don't have a backup here," Stone said Friday.

Kicklighter added that based on a text message he received from Pooler City Manager Robbie Byrd on Friday morning, the county should consider negotiating with the city of Pooler for the sale of the Hunter's Ridge system. In that way, he argued, the county could ensure that customers of that system never pay more for service than their fellow Pooler residents.

Citing a desire to hold off on the purchase agreement to meet with Pooler, Kicklighter was the sole vote against the contract Friday. Other board members charged that Pooler had an opportunity to express an interest in the system's purchase when a request for proposals was issued earlier this year.

Water Utility Management President Mark Smith said he's optimistic of reaching an agreement with the city of Savannah to provide backup water in the event of a failure. He said he's also optimistic his firm will work out an agreement with Savannah for the future acceptance of wastewater from his company.

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

Commissioners also voted to sell the Little Neck portion of the water system to Savannah-based Consolidated Utilities for \$63,000.

County Attorney Jon Hart on Friday estimated he could bring an agreement for the future operations of the Modena Island well to the commission by its next meeting on Dec. 18. The county has been in negotiations with property owners on Modena for the future of that system.

In unrelated business Friday, the commission voted unanimously to approve an agreement with the city of Pooler and the Savannah Economic Development Authority to de-annex the Megasite at Interstates 16 and 95.

The goal, Commission Chairman Al Scott said Friday, is to make the Megasite more attractive to prospective corporations by placing it within the boundaries of a government that exempts manufacturing inventory from taxation. "Pooler doesn't want to do away with (inventory) taxes in the entire community, which is what they would have to do," Scott said.

The chairman said Pooler officials haven't expressed any problems with the de-annexation. The Pooler City Council is slated to hold its vote on the agreement at its meeting on Monday.

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

Savannah Morning News (GA)
September 29, 2015

FOLLOW-UP AUDIT SHOWS IMPROVEMENTS IN BUILDING SAFETY DEPT.

Author: Kelly Quimby

A follow-up review of the Chatham County department that oversees building inspections and issues occupational tax certificates reveals that staffers have corrected some of a number of cash-handling problems identified last year by internal auditors. The Building Safety and Regulatory Services Department also is responsible for code enforcement and the tags for animal vaccinations.

According to the document produced by internal county auditors in May, five of nine internal control deficiencies in the department had been addressed since the first report, including problems with the security of the department's finances and the lack of daily deposits.

Four issues remained, however, including a concern that the department's operations coordinator had too much oversight of the department's finances. This finding had not been corrected in the eight months since the first audit was completed, despite the department head's written response that he intended to "implement all the recommendations identified in the report."

The follow-up audit is dated May 15 - the same day the Savannah Morning News put in a request for any and all internal audits completed since the start of the year. The follow-up audit wasn't produced, however, until another request for internal audits was made Sept. 14.

WHAT IMPROVED

Last September, internal auditors with Chatham County sent a memo to the county manager that reported a slew of problems at the department. Among the concerns were missing receipt books, unsecured registers, an unlocked safe, cash deposit shortages and late deposits. In the response letter included with the audit, director Gregori Anderson promised to improve those operations. County Manager **Lee Smith** said in an interview in March that administrators would be monitoring the department to ensure improvements.

Although one follow up has been completed, Assistant County Manager Michael Kaigler said Friday administrators will continue to require additional follow-up audits at building safety. "One of the thing we saw is a disconnect. We didn't have departments doing continuous communication," **Smith** said Friday. "(Kaigler) is doing regular meetings with all these department managers, decision makers. ... That's really helping because those disconnects mean mistakes. We're able to avoid those situations because we're all talking now."

According to the most recent audit of the department's operations, building safety staffers have completed a required annual risk assessment - the first in at least two years. In addition, the department began maintaining animal registration records as the county's records retention policy

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

required. Locks were installed on the cashier's drawer and bank deposit slips are now stored in the department's safe. The department also reconciles and deposits money collected daily.

Unlike the original audit, the follow-up makes no mention of cash shortages or missing funds, late deposits or poorly secured funds. "We actually met with the Homebuilders Association, and although I can't speak for them, they were very complimentary, saying we were acting in a timely manner ... that things were going well," **Smith** said. "We do know we're going to take a look at moving animal control ... (and then we) won't be collecting the animal control fee out there. We'll consolidate up front and be a bit user friendly."

WHAT DIDN'T IMPROVE

A recurring finding in audits of building safety has been the lack of segregation of duties. Last year, auditors reported no change in this condition since the previous report, and a similar note was made in the follow up - despite assurances from the director that closing the department's Chatham County annex location "eliminated the segregation of duties issue." This time around, the concern was that the department's operations coordinator continued to be involved in every level of handling and depositing cash, a practice that had led to cash shortages in the past. The operations coordinator had also continued to process and record payments from a personal office - despite previous audit recommendations and instructions to conduct all processing at the cashier's booth - "up to and including ... the day before auditors reported to Building Safety."

"An effective system of internal control over cash receipts requires that the reporting and depositing functions be separated; this decreases the likelihood of errors (or) misappropriation," auditors wrote. "Conversely, the likelihood of errors and possible misappropriation increases when employees responsible for handling these cash receipts also maintain the records used to document such receipts."

Assistant County Manager Linda Cramer said this concern could be explained by a staff shortage at the time of the internal auditor's visit. The department was without a cashier during that period, she said. "There is a cashier up there now, and I think she's working out really well," Cramer said Friday. Meanwhile, auditors found that in some cases, receipts had been erased from the system without explanation and without management's knowledge. In some cases, daily reconciliation reports were inaccurate, missing or incomplete. The auditor also pointed out that the department had ordered another receipt printer, even though an assistant county manager had instructed them not to last August.

The report suggested more in-depth reviews of businesses to which occupational tax division issues permits and an update to the department's cash-handling policy. The county commission voted in January to require all departments that handle cash to develop written financial policies and ensure these policies are followed. In an email last week, Chatham County Finance Director Amy Davis reported that most departments had followed through. Some, she said, are still working on their policies with the help of a consultant because of changes to their software or

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

recommendations in their audits. The internal audit department is reviewing the policies one-by-one, Davis wrote.

A final concern in the follow-up audit about an "outdated" computer software used by the department wasn't thoroughly reviewed, auditors wrote, because the county was in the process of replacing it. Cramer said she wasn't sure this aspect of the audit report will ever be fully resolved. All totaled, of the 16 recommendations made by auditors last September, the department by May had implemented nine of them, the follow up says.

NEW ISSUES

The follow-up identified two additional areas of concern. In two separate cases, customers of the building safety department were subjected to charges that violated county policy. The occupation tax department had implemented a \$5 fee for businesses seeking copies of their occupational tax certificate, despite a county ordinance that sets the cost at 25 cents per page.

Customers paying by credit or debit card at the office, meanwhile, were being charged convenience fees, despite a recent change to county policy that waived these fees for walk-in customers. Cramer said these charges have since been rectified.

In addition, she said, outside auditors are in the process of reviewing the operations at Building Safety and Regulatory Services as part of their annual audit of Chatham County. "They've been out there for a couple of days," Cramer said. "I'm interested to see what they're going to say. They're the ones that caught on to this in the first place."

Smith said county managers in the meantime are continuing to hold regular discussions with various departments and are planning regular visits to those departments. "We need to be more visible as a management team," he said. "I think that helps with morale. It's tough when you're in a department and you're seen as having problems. People have pride in what they do and they want it done well."

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

Savannah Morning News (GA)
May 28, 2015

**FORMER N.C. OFFICIAL COMPLETES ONE YEAR IN SAVANNAH: MR. SMITH
COMES TO CHATHAM**

Author: Opinion

During the past 12 months, Chatham County Manager **Lee Smith** has been a familiar name in a variety of reports related to county government and its activities, whether it's negotiations over a potential extension of the city/county police merger or putting together a new county budget.

As a refresher, **Smith** came to Chatham County in May 2014 from Goldsboro, N.C., to succeed Russ Abolt, who was retiring after more than a quarter of a century as the county's top administrator. **Smith** emerged as the sole finalist for the position from among 41 candidates after spending most of the previous 13 years of his 26-year public administration career as manager of Wayne County, N.C., southeast of Raleigh.

Since he arrived, he has made his presence felt in a low-key but firm manner, a primary example being the role he has played in the question of whether the Savannah-Chatham County police merger should be extended. **Smith** was straightforward in his early assessment of the original merger agreement, saying, in effect, it was a bad deal for the county and needed to at least be renegotiated. Otherwise, he said, it might be time for the county to re-establish its own police force.

After several twists and turns and a bit of public posturing by city and county officials, negotiations between **Smith** and City Manager Stephanie Cutter have produced a proposed framework for the merger that addresses many of the concerns he raised. County commissioners have given initial approval to the framework, and it goes next to the City Council, possibly as early as today.

During the interaction, **Smith** went from indicating the county was getting little to no response from the city to embracing the "relationship" between the city and county. In other words, he displayed the skills of a proven negotiator familiar with the art of compromise.

In an interview earlier this month with reporter Kelly Quimby, **Smith** said it's hard to believe a year has gone by already and talked about how much time has been spent responding to questions and comments from the public or meeting with his counterparts in the county's various municipalities. He also meets regularly with his executive team and Chatham Commission Chairman Al Scott, who says **Smith's** goal to improve relationships with the municipalities and others seems to be working. "That's what I like about him," Scott said. "He spends a lot of time reaching out."

On the administrative side, **Smith** had barely settled into his office when he found himself facing audits and lawsuits that showed systemic problems in some county departments. These are

Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)

problems, **Smith** says, but he describes them as opportunities for improvement and says many of the issues he's found in different departments can be traced back to inconsistencies in oversight and not following policies. Problems identified in the county's courts, he says, occurred with the county having little or no oversight, something that has to change. As for county administrative departments, a new financial policy approved by the county commission in January - each department has to draft financial policies that include internal controls - should help avoid future problems, he says.

Departments that handle cash will be under video surveillance, **Smith** says, for the safety of the county's customers and for its employees. "Everybody's heard me say, people respect what you inspect," he says. "I think (the problem) has been inconsistent policy and our inability to inspect the departments on a regular basis (but) now we're doing that. One of the things you're going to see this year is we're upping the security systems. I'm going to have a camera that (records) every transaction."

Smith also has brought a new approach to county budgeting. He has required each department to develop a zero-based budget, one that requires justification for every expense. He also has eliminated contingency amounts stashed in departmental budgets to allow executives to pay emergency expenses without having to get commission approval, a move that could save as much as \$700,000. "People are a little nervous about that, but it forces you to budget better," he says. "(A contingency) falsely inflates the budget. I think it needs to be a true budget."

In another move that reinforces **Smith's** belief in planning, he says the county's policies for capital improvement projects have to be changed to ensure the county funds them up front instead of paying for them by "Let's see what's left over." Developing a capital plan, he says, won't happen immediately because it will take at least five years to get a capital budget in good working order.

The bottom line is **Smith** has brought a sense of fiscal responsibility and professional management to county government, one that was much needed. And he has brought a notion of customer service as he stresses to his employees that the public deserves to be respected, to be heard when they have a problem. "Genuinely listening to them, caring about what's going on with them, is important," he says. "I hear too much about government for the sake of government, and none of us are entitled to these jobs. We're here to work for 200,000 and some people." The results, so far, would indicate **Smith** is true to his word, and the bureaucracy of Chatham County is moving in a new - and more professional - direction. Let's hope the next year brings more of the same.

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

Savannah Morning News (GA)
May 1, 2015

**EMERGENCY EXPENSES AT HEART OF BUDGET\ - COUNTY'S \$200M PLAN
INCREASES TRANSPARENCY**

Author: Kelly Quimby

Chatham commissioners on Thursday got their first look at a \$200 million budget proposed to operate the county for the upcoming fiscal year. The spending plan presented by finance director Amy Davis includes nearly \$170 million in the general fund and \$30 million in the county's special service district. It anticipates a 1 percent increase in the county tax digest.

Though the county is continuing the thorough, zero-based budgeting process that began with this year's budget, the upcoming budget marks a shift in the county's spending philosophy. Previously, the county had built in contingencies to provide department heads with flexibility to make emergency expenses, but the proposed budget for the upcoming year has cut all the contingencies - about \$700,000 worth, Davis said.

County Manager **Lee Smith** said this was an intentional change to increase transparency in budgeting process. "It was one of my policies to eliminate contingencies," **Smith** told the board during its non-voting workshop. "If I need to make a change in the budget, I need to come to you."

The change will require more than just the county manager to present his need to the board, commission Chairman Al Scott said. All of the county's constitutional officers such as the sheriff and district attorney will be required to justify their emergency expenses before they're allowed to make them.

Another first is the development of a capital improvement plan, which the county manager expects will track capital expenses and keep them in line with the commission's forthcoming strategic plan.

Currently, **Smith** said, the county isn't funding capital projects on a regular basis and the result is a backlog of needs that have not been addressed. "Capital assessment management is something our team has talked about a lot," **Smith** said. "There are hundreds of millions of dollars of capital needs that the county is saying we need that are not funded. ... That's not how you fund capital. You incorporate that in a long-term capital reserve and you begin to put money away to pay for that."

Other expenses expected during the next fiscal year, which runs from July 1 to June 30, 2016:

* The budget includes a pay increase for jurors and grand jurors. In February, the county signed off on a request from Superior Court Administrator Crystal Cooper to grow the allowance for jurors from \$10 to \$15 for the first day of service and from \$20 to \$30 for grand jurors and for

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

jurors sworn in on a panel. This will be paid for out of the general fund.

* The general fund includes a 1.5 percent increase to the salary table and considers new positions, including a public communications officer and audio/video technician.

* The board is still weighing two options for the \$30 million budget for the special services district. One option includes a \$14 million contract with the city of Savannah to co-fund the Savannah-Chatham police department. The other provides for \$16 million to restart and operate a county police department. No agreement has been signed by either side to continue the joint department, and a scheduled presentation on a framework proposed for a new agreement did not take place Thursday.

Smith said he expects officials from both sides to release a joint statement related to a new merger agreement early next week. That will include a new division of costs for Chatham County Recorder's Court.

Scott said the county has incurred about \$2,000 in expenses to hire a search firm to find a county police chief in the event negotiations don't pan out. The expense for a county police department is expected to decrease after the initial startup costs. **Smith** said the commission will get a more thorough view of the budget document during its meeting Friday.

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

Savannah Morning News
April 11, 2015

**COUNTY: MAYOR MISSES MARK \ DESPITE LETTER, OFFICIAL SAYS POLICE
MERGER STILL NEEDS WORK EVEN THOUGH SOME ISSUES RESOLVED**

Author: Kelly Quimby

As Chatham County administrators prepared to head back to the bargaining table with officials from the city of Savannah, county officials on Friday were making it clear that an agreement over the future of the Savannah-Chatham police department wasn't as close as city officials had made it seem.

In the latest chapter of the public back-and-forth between Savannah and Chatham County officials, county manager **Lee Smith** said the two governments have not agreed upon a framework for a new police merger agreement - despite claims to the contrary made by Savannah Mayor Edna Jackson in a letter delivered to Chatham Commission Chairman Al Scott earlier this week.

There are still points to be worked out between staff members, **Smith** said during an impromptu discussion of the subject at the county commission's meeting Friday. It's true that some issues have been resolved, Chairman Scott said.

Scott said he discussed many of the items in Jackson's letter - including cost sharing for animal control, mosquito control and for property crimes investigations - with her during a regular lunch meeting earlier this month. But something was missing from her list, the chairman said. "One of the things we discussed at lunch that's not in her letter is that after two years, we would move to an evidenced-based funding formula - no ifs, no ands, no buts," Scott said. "That's not in the letter. Outside of that, those are points we discussed."

The county in recent months has proven unwilling to budge on this funding proposal. Arguments against it have been that it would prove too expensive for city residents. That, Scott said, is not the county's concern. "I want this to be as clear as a bell. The county's policing responsibility is to the unincorporated area of Chatham County," he said. "This isn't about crime-fighting in Savannah. We have no responsibility for it. Period. This must be emphasized. "I just wanted to make it clear ... I don't have any responsibility for policing anything in the city of Savannah."

Addressing pleas for third-party mediation that have come from officials in Savannah and the business community, **Smith** said the county has received few to no specifics about how a mediation would be conducted.

Chatham officials previously said an agreement with the city needed to be reached by the end of March, but **Smith** told Commissioner Dean Kicklighter on Friday the "drop dead date" for an agreement will have to be sometime this month. It has been nearly seven months since the county voted unanimously Sept. 26 to end the current merger agreement and set an 18-month

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

deadline to reach a new one.

Last month, the county voted to approve a contract with Baltimore-based Stanton Chase to search for a county police chief at a cost not to exceed \$65,000. Scott reported that while money hasn't yet been spent, work to develop a profile for the right candidate has begun. The search firm will be billing its work at an hourly rate.

Smith said a new chief could be in place as early as August or September, and the county could then move ahead with its plans to rebuild and operate a department at an annual cost that Smith said will be less than what the county is currently paying for police service under its agreement with Savannah.

Smith told a skeptical Commissioner Yusuf Shabazz he'd bet on his position with the county that the savings would come in by at least \$2 million a year. "We've looked at the model ... I think we will be well within \$2 million (in savings)," **Smith** said. "We've had our experts look at it. You will pay less than you're paying today. I will guarantee you, I will place my job on the line you will not (pay more)."

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

Savannah Morning News (GA)
May 9, 2014

COUNTY'S NEW BOSS STARTS MONDAY

Author: Marcus E. Howard

Following retiring Chatham County Manager Russ Abolt's final county commission meeting today, his successor is set to begin work Monday - though a salary agreement has yet to be finalized.

Lee Smith has not signed and returned the county's one-page compensation offer, which was sent to him via FedEx along with paperwork and a copy of the county's employee manual. **Smith** has been dealing with a family illness in Durham, N.C., but is expected to travel this weekend to Savannah, said Al Scott, commission chairman.

As there is no agreement to consider, the commission will likely take up **Smith's** salary at the May 23 meeting, said Scott, who has been working with the county attorney to determine whether **Smith's** employment benefits are subject to commission approval. **Smith's** nomination as county manager was approved unanimously by the commission on April 11. The details of his compensation package have not been disclosed. However, he will be paid less than he made as county manager in Wayne County, N.C., Scott confirmed.

Considered among North Carolina's highest paid county managers, **Smith** received \$221,408 annually, plus a \$12,000 travel allowance, as part of a six-year contract that was terminated earlier this year when he and Wayne County reached a \$325,000 settlement over his severance package following his resignation.

According to Scott, the salary range for the Chatham County manager position was between \$175,000 and \$220,000. "I said to him that I wasn't willing to match his salary in North Carolina, at least not the first year, because based on performance you want to be able to reward somebody," said Scott.

However, **Smith** has been offered an open-ended contract that could be renegotiated in July 2015. And should he be forced out of office this calendar year, under the terms of the contract **Smith** could be entitled to six-months of severance pay, said Scott.

In addition to a transportation allowance, **Smith** - who turns 50 this month - would be entitled to benefits under the county's defined benefit retirement program based on salary and years of service, self-insured health plan and life insurance coverage of one times his salary.

Meanwhile, Abolt, who has been cleaning out his corner office of 26 years this week, will work for the county as a paid consultant over the next few weeks, not to exceed 90 days. He will, according to Scott, be compensated based on his nearly \$190,000 annual salary, which could amount to a little more than \$700 a day.

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

In 2012, commissioners granted Abolt a retirement package that included \$30,000 a year for six years after his retirement, plus coverage of his and his wife's health, dental and life insurance premiums, as well as a \$200,000 non-term life insurance policy. Abolt also elected to continue participation in an independent defined contribution plan.

As county manager, **Smith** will oversee about 1,544 county employees and a half-billion-dollar county budget. Approximately 98 percent of the fiscal year 2015 budget will have been completed by staff by the time **Smith** sits down next week at his new desk in the Old Courthouse on Bull Street. A budget workshop with county officials has tentatively been scheduled for June 3.

One of **Smith's** first tasks will be to meet with county employees in various departments and later with Scott and the two assistant county managers to discuss what it will take to successfully work together. Scott and Abolt were scheduled to meet Thursday to talk about his consultation. "That's why Russ is so invaluable so that he can sit down with him and just go over all that," said Scott.

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

Wayne-Wilson News Leader (Fremont, NC)
February 13, 2014

Smith steps down as Wayne Co. manager

Author: *Barry Merrill NL Publisher*

The dance that began six weeks ago that would lead to **Lee Smith** leaving his post as Wayne County Manager ended suddenly Monday afternoon. County Commissioners adjourned from a session to discuss school funding to an executive session to discuss with their attorney an offer to resign from Mr. **Smith**. When they reconvened in open session, a unanimous vote approved paying Mr. **Smith** \$325, 000 in settlement of his employment contract and agreement to leave the office. The agreement which was made part of the public record and released to the public states all parties agree not to make written or verbal statements that hurt the personal or professional reputation of those involved. All questions to the county on the matter are to be directed to County Attorney Borden Parker.

Mr. **Smith** had been the target of County Commissioner Joe Daugherty for many months, criticizing the costs of his contract which the former Democrat-controlled county board had approved. In October, Daugherty made a motion to fire Mr. **Smith**, but none of the other commissioners voted in favor of the motion.

In late December, the county granted an emergency leave of absence to the county manager, by some accounts reacting to stress from pressure from the board. In early January, his status changed to a paid leave of absence, with Commissioner John Bell, the lone Democratic holdover from the former board, voting against. Mr. Bell offered the motion Monday afternoon to accept the resignation agreement.

In January Mr. **Smith** retained an attorney to represent him in negotiations with the county, and his attorney publicly asserted if the county fired Mr. **Smith**, the county would owe Mr. **Smith** \$1.4 million under the terms of his employment contract.

A motion by Daugherty was not on the agenda for Monday's meeting, but a resolution had been anticipated. Chairman Wayne Aycock had appointed a working group to begin interviewing potential candidates to assume an interim manager position. They had begun interviews on Friday. Commissioners Ray Mayo, Bill Pate and Ed Cromartie are serving as that working group. They had a second interview on Tuesday. Commissioners are hopeful that an interim manager can be named by the end of February, as the county should be deep in the budgeting process at this point of the fiscal year. As there has been no deputy or assistant county manager on the staff, it is widely anticipated that the county will have to recruit someone from another county to take Mr. **Smith**'s place. The NC Association of County Commissioners has been contacted for help finding suitable candidates.

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

Wayne-Wilson News Leader (Fremont, NC)
January 9, 2014

Wayne Co. Manager is suspended

Author: *Michael Jaenicke; Staff Writer*

Wayne County Manager **Lee Smith** was suspended with pay last Friday during a special meeting of the Board of Commissioners. The board voted 6-1 with District 3 Commissioner John Bell casting the lone vote against the measure, which was decided after a 2½ hour closed session meeting.

No one on the board would say the reason for the suspension and when or if Smith would return to his post. Smith had been on a leave of absence since Dec. 17 when At-large Commissioner Wayne Aycock was named acting county manager. Smith was not at the most recent meeting, held in the Wayne County Administrative Building. County Attorney Borden Parker said the closed session meeting was necessary because it involved attorney-client privilege and the board would be considering "the performance and fitness of county employees."

Smith had seemingly no problems during his first decade plus time in the manager's box. But that changed when the board switched from a Democratic to Republican majority a year ago. Six months later, the board voted on whether to keep **Smith** or remove him.

Upset about a payroll issue, District 6 Commissioner Joe Daughtry made the motion to void the contract with **Smith** at the board's July 16 public meeting. Daughtry cast the lone vote against **Smith**. And since the board refuses to give specifics to the public, rumors, guessing and misinformation abound. What is known is that **Smith** makes more than \$200, 000 annually and may not return based on his life situation and/or the board's decision.

When Aycock took over, he said **Smith's** leave of absence was temporary. "Lee has asked for some time off and I think it's well deserved," Aycock said. "It's only going to be a couple of weeks."

Wayne County does not have an assistant county manager or for that matter anyone with a track record of being responsible for nearly every aspect of county business, including financial matters. The Democratic board gave **Smith** a six-year contract on Jan. 1, 2012.

The county can terminate the contract by giving **Smith** a 30-day notice, but would have to pay his salary and provide benefits, even if **Smith** were suspended from his duties. The county would then have to pay **Smith** a one-time payment to cover any accrued vacation and personal time and also pay his salary and benefits for 12 months. The board set no timetable for **Smith's** return, nor did it say he would return.

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

Mount Olive Tribune (NC)
November 27, 2013

Commissioners get \$1.87 million shopping spree

Author: *Michael Jaenicke; Staff Writer*

The demise of the North Carolina Eastern Region group has turned into an economic development tool for Wayne County. On Tuesday, Nov. 19, the Wayne County Board of Commissioners decided to take advantage of money it gave to the organization to fund four projects for a cost of approximately \$1.87 million.

County Manager **Lee Smith** and District 3 Commissioner John Bell, a member of the Eastern Region board, put a quick plan of action together that includes the purchase of a 45-acre site in the Mount Olive Industrial Park, 50 acres for a veteran's cemetery, equipment for Wayne Community College and renovations at the Wayne Executive Jetport. The four projects will be funded fully and Wayne County can also borrow up to \$576, 000 with the one thirteenth-allocation portion from the 13 counties in the Eastern Region. The five-year loan has a 1 percent interest rate.

"These are long term investments that will do good for the county and citizens in different ways," **Smith** said. "This money is an investment in our future. We tried to target how we use the money, so that it would have an impact for 20 to 30 years."

Bell was instrumental in making sure the county would get its share, an amount that was collected from license plate sales since 1998.

Smith drew up the action plan, which he said couldn't tackle an extremely costly project, such as infrastructure concerns, but one that would help several places in the county.

Bell said the Eastern Region group is closing in June 2014 "Let's make this clear, this is \$1.8 million that already belongs to Wayne County, but indeed, Mr. Bell is getting his wish," District 1 Commissioner Ray Mayo said. "This could set us on a pace for economic development and our No. 1 concern, creating jobs. But at the same time it will increase the quality of life for all of Wayne County. It also helps Seymour Johnson (Air Force Base) with flight encroachment."

Smith has worked out a deal to purchase the property in the Mount Olive Industrial Park for \$420, 000. The county already owns two plots of land next to it, which are 47 and 24 acres. All three plots are located behind Hwy 55's headquarters (formerly known as Andy's) and between Old Mount Olive Highway (SR 1938) and U.S. 117. Mt. Olive Pickle Company owns the property on the backside of the county's land. Fifty-plus acres for the cemetery, located along Long's Plant Farm Road, would cost \$462, 600.

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

Welding equipment that will be stored and used at Wayne Community College was a part of the Wayne Economic Development Alliance's proposed Manufacturing Center of Excellence. The county will spend nearly \$300, 000 on welders, \$130, 000 on simulated welding

Smith training equipment, and \$275, 000 on a waterjet machining center and \$69, 500 on a CNC mill that works in conjunction with WCC's engineering lab. Workers and students will then be able to use computer-aided manufacturing, or CAD, with computer-aided manufacturing (CAM). The hands-on CAD-CAM will allow students to learn about the realities of modern industry.

"These are the jobs that are in manufacturing today," said District 5 Commissioner Bill Pate. "And they're good paying jobs. I'm hoping some day we find a bigger facility to put this in."

Smith said discussions on that matter are already on the table. He also said the money from the Eastern Region has to be used quickly. "I had been advised to draw it down as quickly as possible," **Smith** said. "So we're looking to having it done by spring to June."

At-Large Commissioner Wayne Aycock said the plan for spending the money was well devised. "All four projects are worthy, and I'm most excited about the WCC because it has educational opportunities and all that equipment," he said.

While **Smith's** spending plan passed unanimously, not everyone was happy it took flight so quickly. District 6 Commissioner Joe Daugherty expressed his dismay in not being in the loop as the plan took flight. "My concern is there wasn't any discussion on this and I wish I were at least asked for my input on how the funds would be used," he said. "This is the first time I'm hearing about this. It seems to me everyone on the board should be

Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)

Wayne-Wilson News Leader (Fremont, NC)
July 18, 2013

Wayne Commissioner's bid to oust Smith fails

Author: *Michael Jaenicke Staff Writer*

Wayne County Manager **Lee Smith** sat somewhat nervously at his chair during the ending of Tuesday's meeting with the Board of Commissioners. **Smith**, one of the highest paid managers in the state, stared intently at his paperwork as a vote was taken to terminate his contract - immediately. As it turned out, only one man, District 6 Commissioner Joe Daughtery, raised his hand for **Smith's** ouster. Daughtery got a few words of support from his six fellow commissioners but no votes on his motion.

But the drama on the fourth floor of the County Courthouse was better than most cable television shows. When the final scene was played out **Smith** appeared to be given a reprieve - for now at least as the Republican-controlled board seeks to make changes after years of being on the wrong side of partisan votes. The sudden change in events was spearheaded by a report that said the payroll system cost the county more than \$500, 000.

Daughtery, a first-term Republican, went after **Smith** - and perhaps decisions of the past boards that were merely carried out by **Smith** and his staff - like a hound dog with a scent in his nose. While sounding orderly, Daughtery aggressively questioned **Smith** and his management decisions "Numerous times you said there were a handful of overpayments and there was a glitch in the system," Daughtery said. "I don't call 600 (overpaid employees) a blimp in the system. Do you remember telling us it was \$200, 000?" "Yes, **Smith** said, "based on the information I had at the time. Yes."

Daughtery made his motion just after the board had returned from a closed session meeting. "I find myself in an uncomfortable position, but I've lost all faith and confidence in Mr. **Smith**," he said. "He's given inaccurate and false information to this board and prior boards. He states things that are untrue and inaccurate. I cannot make decisions based on information from Mr. **Smith**. I've lost my faith. This is the latest episode and there have been many where the taxpayers lose. There has to be some accountability. I move that we terminate him immediately."

Democratic District 3 Commissioner John Bell, who is starting his fourth term, strongly disagreed with Daughtery.

"I've worked with Mr. **Smith** for 12 years and know how things were before he got here and where they are now," Bell said. "We've went from not having as much money as we showed to being one of the most successful counties in eastern North Carolina. It was under the leadership of Mr. **Smith** that we got a AAA credit rating. "The last I checked a county manager does not make decisions on his own; he dictates the orders of the board. I don't know where Mr. Daughtery is getting his information, but I disagree with him 100 percent. A retirement fund I'm

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

in, which has been around for 100 years, didn't pay me for two straight months. That, unfortunately, is not uncommon."

District 1 Commissioner Ray Mayo sided with Daughtery in some areas but said the time was not right to let him go. "We are not prepared for this," he said. "There have been no applications filled out for a replacement. We're not ready. We could be in two or three months if we prepare ourselves."

District 2 Commissioner Ed Cromartie said **Smith** was not given proper protocol and could not state his case. "Often in organizations this is done by formally writing a letter and then sitting down and letting the person in question answer," he said. "That something like that hasn't been discussed tells you right there that there's been no talks to make this change. He must have been adequate, if not above adequate or there because there has been no discussion about this before today."

Board Chairman Steve Keen said he was not in favor of giving **Smith** a recent five-year contract extension. "I wanted to see his performance record and was beat down by previous boards," Keen said. "I voted to give him one more year after the 2012 elections, thinking he had it in him to finish the one-year race. I think he understands Wayne County more than we are giving him credit for. And whenever I've asked him for something he's embraced me. But as your chairman I am not ready to make a change."

Just before 2 p.m., Keen was the last person to speak at the meeting. "We have 122, 000 people in Wayne County looking at us to set ordinances and policy that will move this county forward," he said. "We have a county manager that today certainly has heard a lot and that impact is not a bad thing. It was good we would vet this information."

Keen said that perhaps new ground might have been broken via the discussion, stressing accountability from every county employee and official. "Today has been a wakeup call for the staff and the commissioners," he said. "While I did not support it in the vote I applaud the county commissioner who called out the county manager. It's all about what happens at the end of the day."

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

Wayne-Wilson News Leader (Fremont, NC)
February 21, 2013

Audit report praises state of Wayne County's finances

Author: *Michael Jaenicke Staff Writer*

The recently elected Wayne County Board of Commissioners received an audit report Tuesday morning for the fiscal year that ended in June 2012. The report came from Paul Nunn and Danna Layne, accountants from Nunn, Brashear and Company. The twosome delivered good news on how the previous leadership had built up the county's reserve funds and that its credit rating had skyrocketed in recent years. Nunn said the county's finance department was awarded a certificate of achievement for excellence in financial report. "It's probably the 16th year in a row you've received this award," he said. "Your finance department has done a very good job."

The unqualified opinion from the accounting firm, the highest ranking given during an audit, showed many positives for the county. "Our debt ratio is very, very low compared to other counties," said County Manager **Lee Smith**. "This has helped us get a high rating and enables us to get loans and helps out in obtaining grants and money."

The county's reserve and general funds are extremely healthy. Nunn said the county does not have much in terms of outstanding capital loans, with the exception of those that funded new buildings at Norwayne and Eastern Wayne middle schools, which came via Qualified Construction School Bonds. It increased the county's long-term debt to \$13.77 million.

The county's net assets increased by \$1, 918, 372, mainly because of governmental activities. The unassigned funds in the general fund checked in at \$28.1 million, or 34 percent of total general fund expenditures. The state mandates that eight percent of the general budget be set aside as unassigned. Two Republicans questioned why the unassigned fund was such a high percentage. "Your officials in the past wanted an additional 14 percent, which is not that uncommon," Nunn said.

Final budgeted revenues for the general fund were \$97.9 million, while actual expenditures were \$83.8 million. Wayne County gets 55 percent of its governmental revenues via property taxes, nearly 21 percent from human services and 17.6 percent from sales tax. The county spends 32 percent of its governmental money on human services, 31.7 percent on education and almost 20 percent on public safety.

In the coming weeks, five Republicans will get a bigger input on the budget as **Smith** and his staff prepare the 2013-14 fiscal year. The commissioners will meet with every department head in the county on March 11-12. **Smith** said each department would be given about 15 minutes to talk with the board. The board has also scheduled a meeting with the Wayne County Public School board and high-ranking officials on March 15. These discussions will likely center around the school system's capital improvement projects, specifically buildings. Other topics at the meeting included: - The board talking with County Planning Manager Connie Price about

Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)

having his department approved small subdivisions, rather than bring them to the full board. Price said this would not include subdivisions or plans that affect the schools, fire departments or sheriff's office. They will revisit the topic at a later date.

Commissioners questioned a \$200, 000 budget amendment for the detention center. **Smith** said the money would hold the county over through the year in terms of paying to have prisoners outsourced to other facilities. He said the jail is always over its capacity of 200, usually by at least 40 inmates. He said that figure has spiked in the past six months and could rise even higher. "If it got as high as 60 it will take more," **Smith** said. "When you hit the 240 mark, the jail inspector starts writing you up."

The board also balked at forgiving \$26,000 that is owed to the county by Wayne Opportunity. The nonprofit handles the county's recycling and uses residents as workers. CEO John Chance said the company has laid off 18 staff workers, but still has 55 employees and 96 clients. Chance said one program has been eliminated and that the company owes \$27, 000 in back taxes. **Smith** said the county has an interest in keeping a relationship with Wayne Opportunities, mainly because it saves the county money.

Chance said the current price of \$54 a ton it receives for recycling materials is too low. "We're losing money until it goes over \$60 a ton," he said. "We've stopped our contributions to employees' 401K programs and are making every effort to stay in business." **Smith** said the county used to subsidize Wayne Opportunity but saves \$75, 000 to \$100, 000 annually from its agreement with the nonprofit. - Commissioner Joe Daughtery suggested the county look into options on residents who file late for present value use of land. The board has granted every late application in the past four months, and has to deal with the concern nearly every time it meets. The board approved a final resolution authorizing a grant programs for ACX Pacific Northwest, Inc.

In another matter that required more discussion, the board talked about whether it would sign off on a grant that would create a walking trail from Wayne Memorial Hospital to Wayne Community College through a medical park and residential district in Goldsboro. The county owns the land and would use it as part of the 25 percent match (\$200, 000).

But the deal is contingent upon the city of Goldsboro taking responsibility for liability concerns of the trail. County Attorney Borden Parker said the county could get off the hook, but since it owns the land, it could be subject to responsibility in court, even after signing off to Goldsboro.

Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)

Princeton News-Leader (NC)
October 18, 2012

Wayne agrees to pay EMS workers time and a half for overtime hours

Author: *Michael Jaenicke Staff Writer*

The Wayne County Commissioners approved a measure on Tuesday that pays emergency workers time and a half for overtime. The move was made months after numerous problems were found in the new payroll system used to tabulate paychecks for about 60 emergency workers. In the new system, adopted in July, many workers were both overpaid and underpaid. Bob Jackson, chairman of the Wayne County Republican Party, instigated the topic during the public comment portion of the meeting. "We continue to hear about problems and they have not been solved," he said. "Now I'm hearing some employees have obtained the services of an attorney. We're led to believe other departments have problems as well. And a \$200 gift of forgiveness for overpaid, why don't we give that to the underpaid?" Emergency worker Rich Swinson III, who lives in Princeton, said all employees have heard are promises that are not kept.

"Today, it was proposed by email by Mr. **Smith** (County Manager **Lee Smith**) we will get straight pay for up to 40 hours and all the hours over (are) time and a half," he said. "We welcome that as long as the hourly rates don't change. We would also like to pay back money in equal increments over the course of the coming year."

District 1 Commissioner Ray Mayo jumped on the topic as the first speaker during a time when commissioners can comment openly on any matter. "We need to approve time and a half today," he said. "I'm told Mr. **Smith** has already done that, so I ask the county attorney if this isn't something this board should have done? I'm not against what is being done, but the protocol. The commissioners should have been involved." Borden Parker, Wayne County Attorney, responded. "In my opinion, the board would need to approve it, and if it costs more, a budget amendment would have to be made," he said.

Smith said he felt the board was behind the move. "My understanding was in concept you accepted it," he said. Determining overtime has been the biggest concern, according to **Smith**. "It's only for EMS workers that we used Chinese, or fluctuating overtime came into play," he said. "I've never been able to figure it out. There's no incentive to work more and get paid less (per hour)." **Smith** said the problems would cost the county money. "Probably at least another \$200, 000 through this year," he said. "But we can afford to do this, and we owe these employees. We have the money, and I will bring an amendment to you in January."

"Somewhere down the line, that guessing about overtime has to stop," Commissioner Jack Best said. **Smith** agreed, but added there are unknown variables. "We have to have a cushion, such as in the case when there's a hurricane or disaster," he said. "We're not going back to the old system, we'll just inputting the data differently. We will be stronger after we come out of this." Emergency workers filled the seats at the previous two meetings. On Tuesday, about 10 showed up. They clapped when the proposal was approved.

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

Wayne-Wilson News Leader (Fremont, NC)
June 7, 2012

Smith presents budget proposal to Wayne County Commissioners

Author: *Michael Jaenicke; Staff Writer*

Wayne County Manager **Lee Smith** laid out his proposed 2012-13 budget Tuesday morning to commissioners. The board's initial reaction to the budget seemed to be positive, as everyone liked the proposal, trusted **Smith** to make the right decisions, or felt it was best to discuss any differences they had during the June 21 workshop. **Smith** said many big capital projects are being put into the budget, while others needed to be discussed.

The budget must be in place by June 30.

Among the wish list projects were:- Helping Wayne Community College with its power plant woes and possibly providing a new building.

- Helping the Division of Social Services - Helping the Agriculture Extension Center - Providing money for needed renovations at Wayne County Public Library's Goldsboro branch and the need for a hub library in the northern part of the county to match what is offered in Mount Olive and Goldsboro.

- Assisting in the master plan of the Wayne Executive Jetport.

"I'm asking the board to take a look at these, so we can choose our next step," **Smith** said. "We have to plan our future based on needs, mandates and money." The budget he has put together is chock full of projects that the county has already started, and a few that were once covered by the state or federal government, but are now in the hands of county officials.

The \$159 million budget will not include a tax increase. The number of county employees has dropped from 927 in 2003 to 700, and **Smith** has asked all department heads to make 2.5 percent cuts. He also said there would be a job freeze on new employees. "I don't know if we can do that, but I'd like to try," he said.

"These are painful and tough economic times. There's a limit to the freeze in that, for example, we have to replace someone like a DSS worker who has an unbelievable caseload. By law, we can't shift that to another employee." Big items included in the budget include: - Replacing about \$120, 000 lost from funding the Day Reporting Center, which **Smith** said saves the county about \$850, 000 annually.

Setting aside about \$1 million for renovations to the jail. Work started this week, but it will not include repairing the roof, which could cost another \$1 million. Spending about \$300, 000 to add quick response vehicles for the Emergency Services and additional help. The move is in lieu of adding another EMS station, and to keep the response time to about eight minutes. Paying out

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

2.7 million and \$3.85 million for building projects for the Service on Aging and Mount Olive's Steele Memorial Library, respectively. Investing \$400, 000 for the fuel farm at the Jetport. Giving \$500, 000 to the Development Alliance. Giving \$250, 000 to the Wayne County Public Schools for money lost from North Carolina's Low Wealth allocation.

Smith worked out a deal where \$16 million in renovations at Norwayne and Eastern Wayne middle schools were paid for without raising taxes or stepping on anyone's toes, using lottery funds to pay for the principal and local funds to pay the interest, which is later replaced by federal funds. The projects will be complete some time this year.

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

The News Argus
March 11, 2012

Smith elected to lead state panel
By Staff Reports

Wayne County Manager **Lee Smith** has been elected chairman of the state Department of Health and Human Services Waiver Advisory Committee.

The committee works in aiding development of performance and outcome measurements of the new local management entities and of managed care organization members.

The 20-member committee is comprised of mental health providers, medical personnel, agency staff who work with people with intellectual and developmental disabilities, mental illness and substance abuse challenges, local management entities (LMEs) and managed care organization (MCO) members.

"I'm excited about participating on a committee that will be the catalyst to a better Mental Health provider system to our clients in North Carolina," **Smith** said. "The major directive is to set measurable actions ensuring proper patient care at an affordable cost."

The committee is responsible for reviewing quarterly and annual report summaries of LME-MCO performance; providing consultation around local and statewide system goals; reviewing outcome measures and trending data; and will assist with problem identification and resolution. "Mr. **Smith** is a perfect fit for this position," said Wayne County Commissioner Chairman John Bell. "He was instrumental in pulling the Eastpointe organization together and has expanded it from four counties to 12 counties."

Bell said that **Smith's** outstanding job as Wayne County's manager and as chair of Eastpointe has gained him recognition and respect throughout the state. "He's known to be well-organized, likable, fiscally conservative, while having the ability to get things done," Bell said.

Smith has been the Wayne County manager for the past 10 years.

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

Mount Olive Tribune (NC)
September 22, 2011

Commissioners discuss Eastpointe merger, approve new hazard plan

Author: *MICHAEL JAENICKE; Staff Writer*

Wayne County Manager **Lee Smith** briefed county officials on work being done that will combine three health care Managed Care Organizations during Tuesday's meeting of the county commissioners. Wayne County MCO provider is Eastpointe, which also serves Duplin, Lenoir, and Sampson counties.

Smith said the state has required many of the MCOs across the state to merge, resulting in fewer organizations that state authorities need to work with. **Smith** Eastpointe is trying to become the lead agent in a merger with the Benson Center, which serves Edgecombe, Greene, Nash, and Wilson counties, and Southeastern Regional, which serves Robeson, Bladen, Scotland, and Columbus counties. Eastpointe has a Medicaid population of 58, 600. The Benson Center serves 51, 168, while Southeastern Regional serves 68, 912.

Smith said the new 12-county organization would be more cost effective and look to stay out of "owning and maintaining buildings" to cut down on overhead. "Statewide, they are looking to trim the number of MCOs to seven or eight," **Smith** said.

Another benefit of the managed care merger approach is that the new organization can re-invest any money it saves. "In the old system, all the money that was left at the end of the year went back to the state," **Smith** said. "We are also not required to have programs that work well in one area, but not another. We might find it works well in Lumberton, but not needed here, and vice versa." The new group is hoping to be formed by Jan. 1, 2013. Based on today's figures, the Medicaid population base total would be 178, 680, with an available Medicaid funding pocketbook of \$40 million.

Smith assured the commissioners that no one would come back looking for money from Wayne County in the event of overspending. He said a recently passed N.C. House Bill does not hold county governments responsible or financially liable for such expenditures. **Smith** said neighboring Johnston County was asked to join the new configuration, but has declined, choosing to stay with a partnership that includes Cumberland and Wake counties.

Commissioners approved the Hazard Mitigation Plan following a public hearing where no one spoke up on the issue. The plan outlines in great detail what needs to be done in emergency situations such as floods, thunderstorms, drought, tornadoes, and hurricanes.

No one spoke up during another public hearing on the county's appropriation of \$206, 220 in funding for the Rural Operating Assistance Program. The programs give money for transportation needs for the elderly, disabled, and poor people with medical needs.

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

About \$62, 000 goes for the elderly and disabled, \$36, 00 for an emergency transportation assistance program, \$560, 000 for a rural assistance program for people without public assistance to pay for their transportation needs, and \$28, 000 is geared to the rural general public.

Other topics at the meeting include: The board approved five people to Goldsboro's Municipal Planning Organization.

Residents appointed to the board include J.E. "Pete" Parks, Vicki Simmons, and Ann Ham, all of Goldsboro. LaGrange's Jo Ann Summerlin, of the Wayne County Planning Board, and Cooperative Extension head Kevin Johnson, of Pikeville, were also selected.

Pamela Holt and Angie Boswell were named as primary and secondary agents on Wayne County's Emergency Management team. Wayne recently got approved for individual assistance from FEMA, and many of the money decisions will fall under the authority of Holt and Boswell.

Smith said second notices on property taxes would be mailed to those who appealed their revaluations within two weeks. He said there were about 1, 800 appeals, and that nearly half will see changes when they open their letters. Any appeal beyond that would have to come within 15 days.

The board approved rezoning 29 acres in Pikeville to Residential-Agriculture 20. The land, which the town of Pikeville released to county authority, is owned by Brian Marcoux.

Three subdivision plats were approved. They included one lot on the north side of Old Grantham Road owned by Darryl and Karla Thompson; one lot on the east side of Mt. Carmel Church Road that is being developed by Dale Perry, and one lot on the west side of Price Road near N.C. 55 for developer Lynn Davenport.

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

Wayne-Wilson News Leader (Fremont, NC)
August 18, 2011

Board accepts bid for Norwayne and EW projects, turns attention to funding

Author: *Michael Jaenicke*

The Wayne County Board of Commissioners took another step forward with building projects at Norwayne and Eastern Wayne elementary schools on Tuesday by agreeing to allow County Manager **Lee Smith** to accept the lowest bid and seek financing options from banks. Monteith Construction's bid of \$14, 535, 000 for both schools earned that company the contract, edging out two other companies by less than \$200. Three firms also bid separately on the two schools as separate projects, but **Smith** said Monteith's bid on both schools was the most cost-effective. The bid came in low enough to include items listed on the project's alternate list, which included \$12, 000 for mobile units at Norwayne and a \$250, 000 update to climate control projects for the school's cafeteria and gymnasium. Eastern Wayne's \$227, 000 climate control project for its gymnasium was also included.

Before Monteith, which has offices in Wilmington and Charlotte, can start, financing has to be arranged. The total bill for both projects is \$16.4 million. **Smith** said the county could now seek \$15 million in Qualified School Bonds. Lottery money and local funds -mostly sales tax receipts - will be used to pay the principal, while federal money can be used to cover the interest, which is about \$750, 000 annually. The county must pay the interest and wait to be reimbursed by the federal government, however. "These reimbursements are on a year-to-year basis, so we have to be prepared if something happens and we don't get reimbursed," **Smith** said. County Attorney Borden Parker said this could save the county \$11.7 million over the term of 14 to 17 years. The bonds have to be sold before December or be forfeited. The county then has a three year three year period to spend the proceeds and complete the project.

Smith said he originally planned to seek bank financing and get approval from the Local Government Commission in November, but because of fluctuating rates, he decided it would be best to do it in September. "There will still be some funds remaining from the lottery money, and I've advised (Superintendent) Dr. Stephen Taylor to allocate it for a solid project to protect it," **Smith** said. Both Eastern Wayne and Norwayne will have old structures demolished, and new twostory classrooms built. The county will use school buildings and property as collateral. Then, the county will lease the buildings and land to the schools until construction warranties expire. **Smith** said the county did not have put up collateral for its last three school projects. A public hearing on the resolution to seek Qualified School Construction Bonds is in the works. Commissioner John Bell asked **Smith** if there was a sales tax advantage if the county owned the schools. **Smith** said the checks and balances are such that it would likely not make sense.

Other topics at the meeting included: · New Wayne County Cooperative Extension Director Kevin Johnson spoke to the board about having his new title and also the title of Crops Agent. **Smith** said that one man cannot do both jobs, and that farmers in the area have bombarded him about the importance of a Crops Agent. The county pays 75 percent of the crops

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

agent's salary. Johnson said the state has not filled the position in part due to its 12.3 percent cut, and that 80 vacant positions have not been filled. The board is sending a request letter to fill the position to North Carolina State University, legislators, and other key parties. **Smith** said the county sends \$30, 000 annually for the position, and asked the board to consider paying the entire salary.

- **Smith** distributed new literature to the board concerning the policy of naming county properties and facilities.
- **Smith** told the board that the Wayne County Multi-Jurisdictional Hazard Mitigation Plan it approved in June was approved by the N.C. Office of Emergency Management and FEMA. The delay in getting it approved was because the city of Goldsboro was not included. Goldsboro is now included, joining Mount Olive, Fremont, Pikeville, Eureka, Walnut Creek, and Seven Springs.
- The board approved a fireworks demonstration in Pikeville on Sept. 10.
- **Smith** said a Veteran's Medical Clinic would be established in Goldsboro. "With the many veterans in the area, this is great news," he said.

Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)

Mount Olive Tribune (NC)
June 9, 2011

Citing shortfalls, Wayne plans to raise taxes
Proposed budget for 2011-12 includes 2.35-cent tax hike
Author: *MICHAEL JAENICKE; Staff Writer*

The price of living in Wayne County is going up. County Manager **Lee Smith** is asking taxpayers to dig deeper. There is a 2.35 cent increase in the 2011-12 budget that county commissioners got to look at for the first time on Tuesday. The increase would provide and additional \$1.3 million for the county's coffers. A person with a property value of \$100, 000 would pay an additional \$23.50 annually. **Smith** said it would pay for future debt service.

Smith has several big ticket items on the table, including \$15 million for projects at Norwayne and Eastern Wayne middle schools, \$13.8 million to renovate a building on William Street for the Health Department, \$3.5 million for Wayne Community College, \$3.85 million for Mount Olive's library renovation and a new senior citizen's building in Goldsboro.

The Commissioners, who didn't have time to read the budget in its entirety, didn't question the tax hike. They will quiz **Smith** on it on Monday at 8:30 in the commissioner's room on the fourth floor of the courthouse. "The \$1.3 million can be accounted with the \$450, 000 we need for social services, balance." Many residents are also getting socked with property tax increases via revaluation.

Every residence and all but a few businesses in Goldsboro have been mailed revaluations. They won't start paying the new rates until September. The \$158 million budget keeps a hiring freeze for "non-essential employees," cuts service hours at the libraries, could delay response time by law enforcement, and will mean longer waits at health and human services.

"The state continues to cost shift to county governments," **Smith** said. "Our focus remains on providing high quality service, provided in a professional manner and as The price of living in Wayne County is going up.

County Manager **Lee Smith** is asking taxpayers to dig deeper. There is a 2.35 cent increase in the 2011-12 budget that county commissioners got to look at for the first time on Tuesday.

The increase would provide and additional \$1.3 million for the county's coffers. A person with a property value of \$100, 000 would pay an additional \$23.50 annually.

Smith said it would pay for future debt \$250, 000 in health costs, loss of lottery money and state retirement," **Smith** said. "Just these are 2.35 cents. We can't even do these without going into the reserve fund "The \$1.3 million can be accounted with the \$450, 000 we need for social services, \$250, 000 in health costs, loss of lottery money and state retirement.. the state continues to cost

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

shift to county governments." quickly as possible. "**Smith** said that while he felt Wayne County was in good shape, it was being cautious.

"The outlook for the county's financial condition can be characterized as cautiously optimistic as we see the first signs of what is expected to be a recovery," he said. "While some revenue sources are experiencing flat or declining revenues, others are showing early signs of improvement. We cannot be sure if or when revenue growth will return to historical levels if every, which makes planning for the future speculative and maintenance of reserve funds even more critical at this time." After **Smith** delivered the proposed budget, he was confronted with another problem, Senate Bill 756, which would require all persons placed in jail to come up with a 15 percent bond payment. **Smith** said passage of the bill would fill the jail in no time. "We'll have 300 to 350 (inmates) by late summer, and at \$50 to \$75 per day, we will have to build a new jail," he said. "We had that planned in the next 7 to 10 years, but not this soon.

Smith said it would cost about \$75 million for a jail to house 500 prisoners. "The day reporting centers and electronic devices work, and it's a lot cheaper," **Smith** said. Our local legislators get it, but four legislators in the western part of the state have stonewalled us.

"The debt service for a new jail is \$3 to \$3.5 million a year, which by itself is a 12 cent tax increase. We're not talking about violent criminals here, either. A jail bond issue would put our capital improvement plan on its head." Wayne County Sheriff Carey Winders, who has gone four years without having money for a new deputy in the county's budget, said he's out of room already.

"We have 245 people today and a facility that should hold 200," Winders said. "If misdemeanor offenders are kept in jail it will go out the roof. There's also no federal or state money for meth lab cleanups, so it will be up to us to pay that cost."

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

Wayne-Wilson News Leader (Fremont, NC)
January 13, 2011

Wayne Co. manager asks commissioners to hold off on new building plans

Author: *Michael Jaenicke NL Staff Writer*

Wayne County Manager **Lee Smith** has saved taxpayers plenty of money over the last five years via creative financing, aggressively seeking grants and knowing how to form partnerships. Through it all, progress has been made. Now, it appears as if **Smith** is holding back. At the last County Commissioner meeting he told the board to put a temporary hold on plans for a new building for the Health Department and Services on Aging. The move came just before the board was to put its stamp on a \$838, 480 architectural contract.

Smith's concerns were the state's sluggish economy and a projected \$3.7 billion budget gap. While Wayne County's unemployment rate was 8.5 percent, statewide it stood at 9.9 percent. Fifty-two of 100 counties have double-digit numbers.

And hardly any talk about money is done in 2011 without mentioning the Republicans as a new force in Congress, which was a Democratic majority for the past two years. "I just came back from a conference and the forecast doesn't look promising," he said in taking the building off the docket. "I am talking May or June. I'm afraid to sign any contracts starting a project. This is a \$13 to \$14 million project. I've been pushing for this but I will tell you I am fearful until I see what the state economy and state budget is going to do. I'd rather hold off." As usual, **Smith** was trying to make something better and also save money. His department's plan was to renovate the Mason's Department Store on North Walnut Street in Goldsboro.

The \$13 to \$14 million project looked like a bargain compared to building one for \$40 to \$45 million from the ground up. So a year of talking up the plan now sends it to the back burner.

But **Smith** didn't back off a long ago proposed plan to spend \$15 million for capital improvements at Norwayne Middle and Eastern Wayne middle schools. The \$15 million plan is divided equally between Eastern Wayne Middle and Norwayne Middle schools. The plan in Pikeville is to build a two-story classroom, air-controlled gymnasium and renovate the current cafeteria. The plan at Eastern Wayne calls for a two-story classroom and administrative building, and air-controlled kitchen and gymnasium. But the bonds must be sold by Dec. 31. The county will then have three years to complete the projects. Commissioners plan to visit each school later this month.

Most people in the Norwayne district have heard expansion talk so much they've become "doubting Thomas" about whether it will ever be done. Talks about it started at the county level in 2006. Norwayne Middle has more than 1, 100 students and is the biggest and most crowded school in Wayne County. Additionally, Norwayne was built on a flood plane, and there has been talk about constructing a building on higher ground the school owns.

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

Both schools have buildings that are aged and in need of repair/demolition.

The system is still hurting from projects last year at Brodgen Primary, Mount Olive Middle and Greenwood Middle.

Wayne County Superintendent Steven Taylor also showed concerns about the economy. He's worried about jobs being sliced. But the plan is to begin construction in the spring and have it completed within a year. Taylor said his system is already down 100 positions, and fearful of what 5 to 15 percent cuts in the budget will do to his staff. About \$4 million was cut from his state budget the past two years. "We've been told our state agencies will take a share of the hit and education is a big part of that," Taylor said. "Any way you slice it, when you cut personnel, you cut services to children, and it makes remaining personnel you have do everything they can to get the job done." But Taylor remains optimistic about the building projects and the collaboration they have with county officials.

Commission Andy Anderson said money was tight and warned school officials about adding "padding" to the two projects.

Smith saved the county \$750, 000 to \$800, 000 in interest that will be reimbursed by the federal government. **Smith** seems to think the bid process and sale of bonds will move rapidly.

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

Wayne-Wilson News Leader (Fremont, NC)
October 14, 2010

Wayne government gets 'A' rating

Author: *Michael Jaenicke; NL Staff Writer*

The Wayne County Commissioners and the county's courthouse were given sparkling report cards recently. County Commissioner Roland Gray delivered the good news about the people running the county.

He said a report card on all 100 counties in the state said Wayne was graded an "A." Wayne County was one of 13 to get a top rating. Seven counties were on the B roll, 33 were on the C roll, 24 were on the D roll and 24 were giving an F. "We've done all this by trimming government while at the same time increasing the numbers," Gray said.

Additionally, Gray reported that Wayne County's 8.4 percent unemployment rate is low for a state gripped in a recession. Every county touching Wayne has a higher rate. The county courthouse's monitoring cameras also earned kudos from County Manager **Lee Smith**.

Ten days ago someone stole items from the courthouse, but did not get away with it in large because of the video surveillance system.

"The cameras did what they were supposed to do and helped us apprehend the suspect within 36 hours," **Smith** said.

Smith said more cameras will be added and more servers are being purchased to hold the video data. "If folks want to do something around here and think they can get away with it I'd like to let them know we've got them on 'Candid Camera.'" **Smith** said.

The bi-weekly meeting was the slowest of the year for **Smith** and the Commissioners.

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

News Argus
May 5, 2010

County bond rating goes up

By Steve Herring

Wayne County could realize millions of dollars in interest savings in coming years and find itself more attractive to economic development as the result of action by Standard and Poor's Rating Services. County officials were notified late Friday that S&P has raised its long-term rating on the county's general obligation debt from "A+" to "AA-." "It is hard for me to believe in the hard economic times we are going through that we have had a bond (rating) increase," county commission Chairman Jack Best said during the board's Tuesday session.

It is the first such increase in at least 25 to 30 years, County Manager **Lee Smith** said. "It shows that the county, county management, county board and finance people have done a great job," said consultant Robert High, vice president of Davenport and Co. and past secretary of the N.C. Local Government Commission, during a telephone interview. "They have been fiscally responsible. They have maintained the financial health, in fact have improved the financial health of the county, which is all for the betterment of the residents of Wayne County. "It's hard to put absolute terms on a bond upgrade. For one thing, it should be something that the folks of Wayne County should be proud of. I think it is very helpful to the businesses in the community. It gives them, and should give them, comfort that they are not going to be caught with any surprises from their government trying to dig out of a hole, so to speak. I think from a business standpoint a rating is also good for industrial recruitment for the same reason -- it shows stability and strength in the government." The upgrades do not happen by chance, High said. "Upgrades are not freely available, they are rare. I don't know that you ever anticipate an upgrade, especially in a down economy."

An upgrade also brings benefits, just like a higher credit score benefits the consumer, High added. "From a credit standpoint, the better your credit rating, as with individuals, you should be able to borrow money at a lower cost and the availability of credit in a tight credit market is improved. The benefits are many. The benefit is more derived from the reasons that they got the upgrade -- the fact that the government is well managed and you don't have tax rates bouncing up and down. It is consistently managed. So they are able to step up and help in bad times."

Smith called the news, "a dream come true." "We know we have capital programs in the future," he said. "This shows that we are stable. Companies that invest in areas look at things like this because they want to go to areas where you have secure services. Also, in future interest this saves us money. This will save us millions of dollars over the coming years."

Reading from the S&P report, Best said the rating reflected the county's:

- * Continued growth and diversification of the local economy
- * Strong financial management and growth in the level of the general fund balance reserves
- * Low overall debt burden and rapid amortization of debt.

Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)

The report cited the county's consistent "sound financial operations which have contributed to consecutive operating surpluses since 2003." In particular it noted the 2007 unreserved fund balance of \$22.9 million or 27.1 percent of expenditures. By 2209 the balance had grown to \$26.5 million or 31.7 percent.

The growing fund balance has been a favorite target of critics of the board. "In the past we have been criticized for the fund balance," **Smith** said. "What are people going to say if we grow fund balance? The story is we stuck to it because it is fact, you have got to have it to survive."

Smith said the county knows it will have future debt and is preparing for it, adding that rating agencies are looking at how that is being done. "A lot of things, including the economy, are out of the county's control, but you can prepare for it," he said. "Commissioners have allowed us by hiring the right experts, putting the policies in place, putting reserves in place -- we were prepared for the downturn. We are weathering it, but we have a long way to go." **Smith** also had high praise for Pam Holt, the county finance officer. A number of other factors have played into the county's economic picture, **Smith** said.

"Our saving grace has been the state, by virtue of Cherry Hospital, the federal government with Seymour Johnson Air Force Base, and growing manufacturing in the area -- AT&T, AAR," **Smith** said. "I think that to me validates the investment we have made in economic development and the investment we made in things like WORK Keys because that has produced jobs, and if you have a good stable labor market the positions are going to come and they have started coming. I think those things have put us over the top."

Also of importance is the new U.S. 70 Bypass that is under construction that will connect to Interstate 795 that connects to Interstate 95. "Business and industry coming to our community should say that this is a community that is stable and growing and that is reasonable in what they charge and how they do business," he said. "This is positive all the way around."

The county has been able to diversify and the goal is to be even more diversified, he said. "That is what the Wayne County Development Alliance is working on, the chamber," **Smith** said. "So you don't worry about one single industry that closes their doors tomorrow that would shut you down. We have been able to suffer through economic hits and loss of jobs."

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

News Argus Newspaper
May 5, 2010

County bond rating goes up
Steve Herring

The local economy has been bolstered by Progress Energy's \$900 million planned new natural gas-fired turbines at its Lee plant on the Neuse River. Another \$15 million in transmission lines are to be added within next two years.

Home prices have stabilized even though some people did suffer losses, **Smith** said. Wayne County was not on the housing bubble, and **Smith** attributes that to Seymour Johnson and the ebb and flow of military personnel into the county.

"We suffered, but we did not suffer like a lot of other communities," he said.

Commissioner Andy Anderson said he has seen a lot of things happen that contributed to the new rating such as AAR, Spirit Aero Systems in Kinston and now the proposed Sanderson Farms plant.

However, having the better rating does not mean the county can relax its efforts, **Smith** said. "When you get to a certain level you have to fight to stay there," he said. "It doesn't mean that you can relax now, you work harder."

"Managing county government is big business, it is a complex business and you do have to stay ahead of the game," High said. "It is a constant challenge to keep things moving forward."

Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)

News Argus
March 9, 2010

Officials: They saw Northrop Grumman decision coming

By Steve Herring

Wayne County officials said they are disappointed, but not entirely surprised by Northrop Grumman Corp.'s announcement that it is dropping out of the competition to build refueling tankers for the Air Force. Despite the Monday announcement, the local leaders, who are in Washington, D.C., for the National Association of Counties' annual legislative conference, remain hopeful that local companies, such as AAR Cargo Systems, may still be in the running for some of the work associated with the tanker construction. Northrop had been competing against Boeing Co. for the \$35 billion contract to build the refueling tankers. Had Northrop, which was partnering with the European Aeronautic Defense and Space Co., won the contract, AAR likely would have been a beneficiary of that work.

County Manager **Lee Smith** and commission Chairman Jack Best met Sunday in Washington, D.C., with a delegation from Mobile, Ala., as well as representatives of EADS. The group from Mobile also was interested in securing some of the contract work had Northrop won the contract "EADS told us Sunday it was a possibility they would not compete, that they felt it was too much of an uphill battle," **Smith** said in a telephone interview today. **Smith** said he had heard the same comments Monday, before receiving the call about the decision.

Northrop's decision probably knocks out EADS, a major international competitor, that had partnered with Northrop Grumman to vie for the tanker but was not expected to be able to compete against Boeing on its own. The delegation from Mobile also had an interest in Northrop getting the contract and had contacted Wayne County officials about the issue.

"It is a shame," **Smith** said. "That is pretty disappointing. It was really going to help us with AAR and other local companies. Northrop really looked better, with an Air Force multi-use plane that could carry troops and equipment as well as fuel and operate 25 percent less (cost) than Boeing."

Smith said that Boeing has a large "footprint" in the country, but would not be as much of a direct help to local companies as Northrop would have been in a position to be. "We are still in the game," he said. "Northrop and EADS build the booms for the new tankers."

Smith and Joanna Helms, president of the Wayne County Development Alliance, said Alliance officials have not yet spoken to anyone from AAR about the announcement. "Oh, it is a loss," Mrs. Helms said. "It is a lost opportunity for Wayne County and North Carolina. It would have been a great thing anytime a local company like AAR to be involved in such a large project."

The impact would be felt on the local, regional and state level, she said. Mrs. Helms also expressed some frustration about the decision-making process. "There is not a lot on the local

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

level we can do," she said. "We are kind of so far out of the loop as far as decision making. It is out of our hands and it can be frustrating."

State Sen. Don Davis, D-Greene, also had begun to work toward a different outcome -- lobbying federal officials to pursue a dual-source procurement solution to allow both Northrop and Boeing to build tankers.

Such a solution, which was also being proposed by officials from Alabama, a nonprofit, nonpartisan coalition called American Jobs Now, and a Gulf Coast aerospace and aviation business and economic group called The Aerospace Alliance, was estimated to be able to produce 100,000 jobs across the nation, as well as build the tankers at twice the speed.

However, at the very least, Davis said, the fact that only one company is bidding on the project is distressing. Even local governments are required to secure at least three bids whenever possible - - and their projects aren't ultimately worth trillions of dollars.

"I believe competition is important. Right now it is apparent we may be on a pathway of giving a blank check to a defense company," he said. "Obviously taxpayers win when there is competition. Whether it was dual procurement or not, I'd have loved to have seen a competitive process. It seems like something is broken there."

AAR officials could not be reached for comment prior to press time this morning.

Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)

News Argus
August 13, 2009

Smith told Price to hold off on hearings

By Steve Herring

Wayne County Planning Director Connie Price might have been hesitant Tuesday night to say who told him not to schedule community meetings to discuss zoning, as had been ordered by the county Planning Board. But County Manager **Lee Smith** had no such problem. "I told him," **Smith** said Wednesday. The issue came up after Planning Board member Steve Keen reminded fellow board members that they had agreed to hold a series of public meetings starting with one on the U.S. 70 Bypass interchange at Wayne Memorial Drive. The meetings were to gather public input and interest in zoning. Keen asked Price if he had scheduled the meetings and Price replied he had been told not to but declined to say who ordered him to hold off.

At issue, **Smith** said, is the danger of zoning being confused with a multitude of other issues currently facing commissioners. In addition, county commissioners need to be aware of what the Planning Board would be sending out beforehand, he said. **Smith** said it was not an attempt to censor the Planning Board, but rather to allow commissioners to be aware of what was going on when people began calling about the meeting. The Planning Board's first attempt at having a zoning meeting earlier this year was the victim of such confusion, he said.

The original concept was to have a series of meetings across the county starting in the areas along U.S. 70 west at Rosewood and the U.S. 70 Bypass and Wayne Memorial Drive interchange.

A brewing controversy over the Goldsboro Municipal Planning Organization erupted prior to the start of the meetings. The meetings were canceled out of concern that the issue of zoning would be lost in the confusion. Conditions are ripe for the same problems to develop again, **Smith** said. "I am concerned there are a lot of issues out there," **Smith** said. He cited the lingering MPO uproar, possible changes in the subdivision and mobile home ordinances and zoning. "There are a lot of irons in the fire," he said. "I said (to Price) let's be clear (about the issues). I am telling you not to do this now. Let's get these other issues out of the way and settled. "I have no authority over the Planning Board, but I do over the planning staff."

There has been a lot of "mixing" of the issues, he said. As such, he added, it is important to get good information to people and not waste their time. "They need to be educated on the subject matter," he said. "It is as simple as that. Also, the commissioners need to at least know what is going on. They are going to get calls and they are going to be in the dark. I am telling you right now we need to keep the issues separated."

Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)

The News Argus
August 11, 2009

County manager vows to help schools

By Phyllis Moore

Stepping out of his role of county manager Monday night, **Lee Smith** made a commitment to Wayne County Board of Education to enlist an army of volunteers for the school system.

A parent himself, **Smith** took on the mantle after serving as a test proctor at his daughter's school in the spring. Witnessing some of the students' frustration in being able to finish the tests struck a chord with him, he said. "It was obvious they were not going to make it," he said. "I left there very upset, very concerned. ... What I saw in talking with some of the staff was the frustration of the teachers, though they have these kids seven, eight hours a day, nine months a year."

While parents have the most important job in the world raising a child, teachers are in second position, **Smith** said. "They influence our children, but they have got a disadvantage also. They become parents for eight hours a day," he said.

There's a question bandied about the county commission when challenges present themselves, the county manager said -- "What am I going to do about it?"

Smith said he took the question to heart and decided to take action. "What I'm about to tell you is nothing new," he told the board. "It's no great idea. It happens every day." Mentors and tutoring are needed in the school system, experts say -- to provide individual attention that the teachers often can't give. **Smith** proposed the "local government volunteer partnership," starting with the county staff, volunteering and being trained for the job. "Every one of my county commissioners have made a commitment" to do that already, **Smith** said. Since, a total of 30 volunteers have stepped forward. "My goal is 100," **Smith** said. "I want to exceed that goal. We have all volunteered to give our time."

If it takes a village to raise a child, then who better to set the example than its leaders? "We have to take care of our children by giving them an opportunity," **Smith** said, citing something he recently heard schools superintendent Dr. Steven Taylor say at a seminar -- "Children must have at least one person who believes in them." A few volunteers will make a dent, but many can make all the difference. **Smith** said he has made a commitment to "go after 100 folks," but added he is confident the number could exceed that.

In addition to the commission and county staff, he expanded his challenge to include the City of Goldsboro and outlying areas -- Mount Olive, Fremont, Pikeville -- "because everybody has a talent, to go into our schools." It's time for the community to step up, **Smith** continued, because the school board cannot do it alone. "It's put up or shut up time for this community. I mean it," he said. "We're committing our staff to take time, mentoring takes a lot of time, training. You're

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

talking making a commitment to a child long-term." **Smith** said he envisions providing training for the volunteers, and at the outset mentors will be assigned to the middle schools. School board members were appreciative of the suggestion.

Board member Shirley Sims praised **Smith's** decision. "Today you have taken the charge and the challenge. If we could get others who have made such negative comments (about the schools) ... because you're either part of the solution or you're part of the problem," she said.

Board member Thelma Smith also thanked **Smith** for his stance. "What you did is what we have been trying to ask all along," she said. "We know we work hard -- our teachers, our staff, our superintendent. The next piece has been just what you told us."

Many in the community have not set foot in the schools, so can't claim to understand the problems, she said. It would be nice if they could "see for yourself" like **Smith** did, she said. "By you speaking tonight, I'm sure there's going to be other groups in the area who are going to follow suit."

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

News Argus
July 9, 2009

Manager to county: Freeze my salary, too

By Steve Herring

When County Manager **Lee Smith** compiled the 2009-10 budget that was approved last month he did not include any salary increases for county employees or for himself, even though his contract with the county provides for an annual increase of 5 percent.

Smith's salary is \$160,416 and he receives \$12,000 annually for travel. According to data compiled by the North Carolina Association of County Commissioners, **Smith** is among 14 managers statewide who are paid a base salary of between \$150,000 to \$175,000.

Smith oversees a \$157.6 million budget and more than 800 full-time employees and a total workforce of close to 1,000 when part-time help is included.

In a letter dated May 1, **Smith** wrote to commission Chairman Bud Gray that, "Due to economic and budget conditions, I am hereby requesting the clause within the employment agreement between me and the County of Wayne determining an annual increase for my position be halted for fiscal year 2009/2010. Due to the fact the county will be unable to give raises to county employees; I feel strongly that I should fall under the same guidelines/restrictions. I appreciate your support and look forward to a time when Wayne County can continue to grow."

Smith said he only decided to publicly comment on the letter after rumors surfaced that he had received a raise. "Otherwise I would have said nothing because I did not think it was deemed worthy," he said. "I just wanted it to be quiet. I did not want to come across like I was trying to be a martyr. I asked a couple of board members about it and they said that is 'your call, we have a legal binding contract with you,' a five-year agreement."

Another rumor, he said, was that the agreement provided for a five-year severance package. "It is a one-year severance deal," he said. "If I am fired for something criminal, or for negligence, I don't get paid anything. I am not a county employee. I work by statute at the pleasure of the board of county commissioners. I can be fired for parting my hair wrong. "The board gave me a contract, they came in here and renewed my contract at their behest. They said, 'It makes us feel better and we want you to feel good about the job and not feel politically pressured every single day.' That gives you at least a feeling that your board is supportive."

County employees have policy and law behind them, **Smith** said. "The rights given to a county employee, I do not enjoy," he said. "They are by statute at the pleasure of the board. But they (employees) have forewarning and all of these other policies that we create. I don't. So the board was kind enough to do that and put it (a contract) together." The contract spells out the travel allowance and insurance. **Smith** receives all benefits provided full-time employees. The county provides at no cost medical and dental insurance for **Smith** and his family and at least a 5 percent

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

annual contribution to **Smith's** 401K plan. **Smith** said he had received a call from the county's human resources department that someone wanted a copy of the contract. "I told them to tell the person to call up (to his office) and that (a copy) is 10 cents a page," he said. "It is pretty easy. It is not a secret. There is nothing to hide. The rumor is that it has been asked for and that we have refused to provide a copy.

"I have asked the clerk to the board of commissioners and my assistant if there has ever been a request in my eight years for my agreement. No. It has never been asked for." **Smith** provided a copy of the two-page contract dated Jan. 1, 2008.

In the contract **Smith** waives his rights of confidentiality concerning the agreement and notes that "to that end authorizes the disclosure of this agreement and its entry upon the board's minutes."

The North Carolina Association of County Commissioners recently released data it collected from the state's 100 counties concerning salaries. According to the data Wayne County has a population of 114,000 and approximate valuation (2007-08) in millions of \$5,603.

The commission chairman receives \$11,838 annually and board members \$9,613. Commissioner Jack Best does not accept any of the pay or benefits, **Smith** said. "If there are other things that we attend or go to, if there is a cost associated with it, he reimburses us," **Smith** said. "He tries to pay in advance if he can, but sometimes that is hard to do. "He is in a position to do that and does not fault others who don't. He looks at it as he is serving the public and he wants to do that and that is pretty admirable. Not everybody can do that. He has done it since the day he got on."

Information was unavailable for eight counties in the data compiled by the North Carolina Association of County Commissioners. Another, Onslow, had a vacant manager's office when the information was gathered.

Managers' salaries range from a low of \$30,384 in coastal Tyrell County to \$215,656, plus another \$12,149 in travel in Mecklenburg County. Wake County is a close second at \$214,127 plus \$6,000 in travel.

Commissioners' salaries range from lows of \$450 per meeting for the chairman and \$150 for members in Tyrell County to a high of \$27,962 plus \$3,528 in travel for the chairman and \$22,370 plus \$3,528 in travel for members in Mecklenburg County.

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

News Argus
January 8, 2009

County manager asks officials for four-day workweek expansion

By Steve Herring

Wayne County Commissioner Steve Keen wants more than assurance that the county's four-day workweek is indeed saving money before agreeing to extend it to all county offices.

County Manager **Lee Smith** had suggested at commissioners' Tuesday meeting to make the schedule countywide effective Feb. 1 and commissioners appeared poised to allow him to proceed when Keen voiced his objections. "To go countywide, I have an issue with that," Keen said. "I have just not seen any figures as to where the savings are."

Most county offices switched to the four-day schedule in August and are closed on Fridays. The landfill and convenience sites are closed on Wednesdays. **Smith** had said he planned to ask commissioners to make the schedule countywide to include the Register of Deeds and tax office. That proposal has prompted a letter of protest from Lynwood D. Williford Jr., president of the Goldsboro-Wayne County Association of Realtors.

He wrote that "many" local Realtors, attorneys and mortgage lenders were concerned such action would negatively impact real estate closings and related transactions. Closing the offices on Friday would be a "hardship," he wrote. "We believe the continuation of a traditional five-day workweek to be in the best interest of the citizens of Wayne County that utilize these services on a daily basis," Williford wrote.

Commissioners made reference to the letter during their meeting, but **Smith** and several commissioners said it was one of only a few comments they had received in opposition to the four-day schedule.

Smith said that if the closing would hinder people from doing business "in a large way then we don't need to do it." He said there is somewhat of a morale issue involved since some 700 to 800 employees are off on Friday and the other employees want to know when they will be able to be off as well. **Smith** broached the subject during a work session following the board's regular meeting when he told commissioners the program has saved the county about 12 percent on energy costs. **Smith** said some people already think the Register of Deeds and tax offices are closed on Fridays. "We have two sets of hours and it is confusing," **Smith** said.

Closing the two offices would not be a "large" savings since they are only two offices and the courthouse would have to remain open, he said. **Smith** said the most savings would be at the Health Department and Department of Social Services where an entire building is shut down. "Get to the point," Commissioner Jack Best joked. "I would like to go four days countywide," **Smith** said. "I think a lot of people out there want to see if it is working and I would like to show evidence to the people," Keen said.

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

Best said that the best time to make the change would be during the winter because activities are down. "Give Steve the data," Best said. "Give it to the people," Keen replied. The evidence needs to be shown to the public, he said. "Even without the data the people working the four-day week work more efficiently," Best said. "I think the attitude of the people is better."

Best said having the extra day off allows employees to spend more time with their families. "I am for trying it," he said. "It might not work, but if not, you can go back. I believe winter is the best time to try it."

Commissioners J.D. Evans agreed and called the four-day week "a work in progress. You need additional time to make a better evaluation. The employees I have talked to are in favor of it."

Smith reminded commissioners that the initial four-day schedule was implemented by administrative, not board action. "Is that OK with you?" Best asked Keen.

"No sir," Keen said.

"What do you want?" Best said.

Keen said a review of the county audit would be a good time to bring out the cost savings. Commissioners plan to discuss the audit during a retreat following their Feb. 3 board meeting during which time they expect to examine the county's finances heading into budget preparation. Looking at the audit will allow commissioners to compare the past six months with the same period during the prior year and to see what the four-day workweek has saved in county departments. "Bring it before us in the work session and come back to the board and talk about it as a whole," Keen said.

He added, "Shutting the county down for a day basically in the thought process of the public is that the county is open four days a week, even though they are 10-hour days." Keen added that the four-day schedule has been in effect for only six months. When it was first proposed it was for a one-year trial period and that is what people are expecting before changes are made, he said.

Commissioner Andy Anderson was prepared to offer a motion to delay action to replace a motion he thought Best had made. Best said he had only voiced his support without making a motion.

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

News Argus
December 28, 2008

County manager looks ahead to 2009

By Steve Herring

There is not a lot to be optimistic about in a downward-spiraling economy that is still trying to find the bottom of the barrel. But Wayne County Manager **Lee Smith** is hopeful that steps taken over the past several years will help insulate the county from the worst of the freefall and allow it to keep projects, such as the \$23 million school facilities plan, on target. **Smith** also views the county budget's health as validation of commissioners' efforts to increase the county's fund balance in the face of criticism. He balances his optimism that the county will not only weather the financial crisis, and may even be able to garner some benefit, with deep concerns over what could be slash-and-burn tactics in Raleigh as legislators raid funds to cover a \$3 billion budget shortfall. Even with those concerns, **Smith** said commissioners have indicated there will be no property tax increase next year. "When I look at next year's budget I see no increase," he said. "I think we have to stay where we are or less. We made the cuts before 2008 in preparation for not only trying to get ready to borrow money for the jail and schools and those kind of things -- we were preparing ourselves for the future as far as having money."

"I still feel strongly about not using the capital and fund balance for one-time items. It is still for emergencies. I am still very hesitant to go back into the fund balance to pay for operations. Now for this coming year I know commissioners, in their mind are going 'no tax increase.' People are under hard times right now. "So what we did for this year we went revenue neutral and in some cases we went below state forecasts and said 'we don't believe it' (state projections). I did not plan on one extra dime this year in property tax and there is a reason because we didn't think it was going to be there." Some areas, say along the beaches, planned on higher values that have dropped dramatically and now they won't be able to make budget, he said. The state had promised some \$2.5 million to \$3 million for Medicaid. "No way we were going to get that this year from the state," **Smith** said. "So I counted on a million and if I get \$2 million then great, you are \$1 million ahead of the game, but don't count on it." He added, "Sales tax is down, but you have got to remember we live 90 days in arrears in sales tax so you don't have a real picture yet. I will be real curious to begin seeing in February and March what December looked like. That will be the real test. "We know we will see a downturn. How much, I'm not sure, but we did not count on what the state had said. It could it get worse and if it does I will have to make adjustments on the county budget. We already have frozen jobs, already frozen capital projects. I think we have done the things we can do right now to kind of prepare for this downward shift in revenue."

Complicating the economic picture somewhat is the county upcoming property revaluation. **Smith** said some people are concerned about conducting revaluation during an economic downturn. "It could have a negative impact," he said. "But say you get beyond 2011, the board may want to go to four-year (revaluation) cycle if you have an upturn in values because you don't want to live with lower values. You want to value closer to what the market value actually is."

Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)

Smith said the state has depended on capital gains tax revenues for years to balance budget. "They are not going to be there this year," he said. "It is going to be a problem." **Smith** said it is difficult to know what direction the new state leadership will take. "You have got to be prepared for what they pass down to you," he said. "Usually what they pass down to you is usually less in reimbursements, less in funds of any sort, but they will pass on program responsibilities that in the past have been their responsibility. For example, this past year the state required counties to shoulder more of the cost for foster children care. For Wayne County that meant another \$450,000. **Smith** is concerned about what the lawmakers will do and what funds they may take, including lottery proceeds meant for education. That, he said, could affect the county's school facilities plan. "They have got big holes to fill and where are they going to fill it -- they're going to start to look at pots of money," **Smith** said.

The county schools currently have \$6.2 million in lottery proceeds, but the money technically belongs to the state. "I say get it in the schools' checking account," **Smith** said. "Obligate it. I say build Eastern Wayne or Norwayne or a combination with cash tomorrow. Obligate it or we are going to lose it." "Bid it out and let's do that now," he said. "I am urging them (school board) to move quickly because I think they are going to lose it (lottery money). "I think if we borrow \$16 million and hope to use that (lottery) later I think it is going away. Ask counties about the inventory and intangibles (taxes) in the 1980s. The state said 'We'll never take your money.' Now it is gone." Even a supposed break in Medicaid has cost the county. "The state said 'we are going to give you full relief' and then when it passed they took some of my sales tax. We lost hundreds of thousands of dollars over that. Even though we gained, we still lost a revenue source. I think they are going to take it (lottery) because they don't have a choice. They are not going to raise taxes. "The next phase for the school plan is bond money and bond money is not there. It could be several years before the project could be done."

Smith said people have said to him that adding to the fund balance is just a way to get ready for capital projects. "That's true, but we also did it to build and our sustain our credit rating," **Smith** said. "You also want to do it in case of an economic downturn. Well, we are in one. "The thing Wayne County has been able to do over the past few years is to put some money aside." Meanwhile, numbers from the Health Department and Department of Social Services worry **Smith**. Applications for the Women Infants Children (WIC) program are up by about 25 percent. Food Stamp applications are up as well. "I think our general health visits are up," **Smith** said. "It's not just those that who are poverty stricken who are walking into DSS and Health Department. These are people who just months before were making \$40,000, \$50,000 or \$60,000 and now don't have a job. They are coming to Wayne County going 'I need some help. I don't have health insurance, what do I do?' "We see them because that is our job. County employees are concerned because when there is an economic downturn their production goes up. That is the thing that is so concerning because that is when there is a strain on taxes yet there is more demand on services. I think we have to be real concerned about that."

Housing sales are down, foreclosures are up as are job losses, he said. "There is a lot of fear out there," **Smith** said. "We have people here who build things for the automotive industry so we all

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

are kind of standing back holding our breaths about that. When you watch the Congress hearings about GM and Chryslers that affects Wayne County."

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

The News Argus
October 26, 2008

County surviving economic downturn
By Steve Herring

County Manager **Lee Smith** said Wednesday he has "put the skids" on some county spending. **Smith** said while he remains confident that the county's sound fiscal responsibility over the past several years and its ability to grow its savings have put it in a position to weather the ongoing financial crisis, he is still concerned about news he is hearing from the state.

The economic downturn isn't expected to derail the county's plans to put a new \$9.7 million communications system in place, but it is too early to tell if it will impact a planned \$22 million school renovation and building project, he said.

The "skids" include a freeze on hiring of non-essential personnel as well as a delay in some capital purchases until the end of the year to see where the county stands, **Smith** said. There are not that many capital purchases in the budget, items that include computers and vehicles, he said.

For instance, the county is looking at shifting vehicles around instead of buying new ones, he said. "In some cases we have to buy new because we have some that are older that are costing us a lot of money," **Smith** said. "It (vehicle purchases) is being looked at on a case-by-case basis and we are doing a cost analysis -- how much does it cost to operate it and maintain it. If we are at a point at which we are losing money we will look at a new vehicle, one that might get better gas mileage and reduce maintenance cost."

The four-day work week the county implemented in August is also a "piece" of the county's savings efforts. "Now we are telling workers 'when you leave your office for a period of time, cut your lights off,'" he said.

Smith said that might not seem like a lot, but if he saves \$25 a year by turning off the lights in his office and that savings is multiplied by all of the other offices then it "adds up."

Another area of savings has been in a reduction of the number of county employees. Over the past several years, the county has left 123 positions vacant, resulting in a savings of \$2.5 million to \$3 million, **Smith** said.

But now employee turnover in the county is at an all-time low, he said. "People are staying put," **Smith** said. "I hope that county employees are fairly satisfied with their job and benefits. We used to have wiggle room in open positions, now it is just not there." **Smith** said he is concerned about what he is hearing about cuts on the state level. Early indications were a \$250 million budget shortfall. **Smith** said he would not be surprised to see a \$1 billion shortfall based on what he has seen.

Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)

Gov. Mike Easley has made cuts so that might help some, **Smith** said, and some areas look better than they did a couple of weeks ago. "I think the state will have to look to cut and one of the places I fear is going to be Medicaid," he said.

"I have never taken what they (state) said they were going to give me at 100 percent," **Smith** said. "In some cases I cut it in half and say there is no way we are going to get that much. I just never felt that confident about it. I think that will help us if the state decides to start drawing that (Medicaid) back next year.

"Also, we planned for this year and next year that our revenues would be flat. No increases. Therefore, if you have extra money you bank it away. You don't spend what you think you might have. You spend what you know you have and save what you have. I think that has helped us this year and that is why I am not as panicked as some. The way a lot of folks fix budgets is that they overestimate revenues and adjust budget at year's end in an audit. We don't do it that way."

"Right now I think we are holding our own and are waiting to see the next sales tax figures," **Smith** said. "We have not seen a major hit yet, but they say we are going to get it. But I think by our projecting flat (revenues) I am hoping that we are kind of prepared for it.

"But that does not mean the county can sit back and say it is prepared for it. We have to look for ways to cut back."

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

Princeton News-Leader (NC)
February 6, 2008

Smith sees more positive tone in county

Author: *Barry Merrill, NL Publisher*

Wayne County Manager **Lee Smith** had just met with the Carl Best Leadership Group. That hadn't always been one of his favorite meetings. In fact, as he tells it, "I made them mad in 2007." One of the members of that farming community group, Gerald Ballance of Fremont, met with him after that meeting. "You came across very cold," Mr. Ballance reportedly told the county manager.

Mr. Smith asked Mr. Ballance and the group to stand up and make their voice heard. "You have a say so in the community. You've got to tell us what you want in your community." **Mr. Smith** was very excited about what he heard this year as he challenged each one to raise one or two issues. He said 70% of the questions were about schools, reflecting their concerns and the increasing importance of education in farming. He said zoning was one of those subjects that riled many in years past, but today there is growing appreciation of the protection zoning offers farmers and others in the county. He said transportation, both rails and roads, are of concern to many in the county.

Agri-business is not the only ones concerned about schools. The business community has been stepping up, not only seeking improvement but offering how they can help. Business people are having a tough time finding and keeping qualified employees. Recently the county helped fund the Work Keys program, which certifies to employers that applicants have certain work skills necessary to do a job. He said this not only offers certification, but also orients students for skills necessary to be productive employees.

School Board Chairman Thelma Smith is concerned about students who choose to drop out of school not finding a positive path in society.

Mr. Smith spoke about a program where Teresa Bayer is working the Judge Braswell and the Wayne County Development Alliance to provide GEDs for substance abusers who are completing rehabilitation and want to work. "We want to get them before they end up in jail and learn things that will make it even harder to turn their lives around."

He hopes more mentoring programs can be developed to help meet the needs in the county. **Mr. Smith** said that while some of his meetings with citizens have not always been positive, some of his meetings with county employees have not always been positive either. "We've made changes in staff, we've had staff turnover, and we've retrained. Some days people don't like me very much." He says they have been trying to clean their own house, not necessarily trying to find fault, but to find where they need to invest. They're setting measurable objectives in every department, and that's not always easy.

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

He pointed with some pride to the community's recognition of the need for a new animal shelter, and with the community raising \$600,000, including a \$100,000 anonymous pledge. He mentioned that the fundraising success was earning him a haircut, as he was getting his head buzz-cut in response to a challenge he had issued.

He also pointed to Commissioner John Bell taking his time to plant flowers at Goldsboro High School, trying to beautify that school campus as a volunteer. He wanted to make the school look better so people will take more pride in the school.

Mr. **Smith** is concerned about health services. He says while most of us see public health services as just for the poor, there are many in the county who can't afford health insurance, including many working people. Some can't afford the insurance or the deductible.

He says the WATCH van services and clinics are vitally important for the county to provide those services.

One of the benefits of improved health services is reduction in employee absenteeism, and healthier students do better in school.

Much of the conversation revolved around the recently proposed \$23 million school facility plan, and Mr. **Smith** acknowledged that was just the start of the needs. Finding money to do more school construction, along with a new detention center, buildings for health and DSS, and services for the aging is going to be challenging. "Wayne County can't borrow \$300 million." One of the benefits he sees to help finance will be lowered operating costs in new school buildings.

Eventually the county will need to pass a bond issue, but they need the vote of the people to spend the money. "Their vote will be the authorization to spend the money."

Mr. **Smith** says in the six years he has been in Wayne County he's seen changes in the way the community is thinking about things in the county. "It's not the same chatter you used to hear. We're talking about 'what do you want to see better?'"

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

Wayne-Wilson News Leader (Fremont, NC)
September 27, 2007

Wayne Commissioners plan for growth

Author: *Sarah A. Wise*

27 September 2007 - School facilities in the northern end of the county were the hot button issue at the Wayne County Commissioner's Community Meeting at Charles B. Aycock Monday night.

After giving a brief presentation on services the county offers to all of its citizens, County Manager **Lee Smith** addressed questions that citizens had written and submitted before the meeting began. And while the topic ran the gamut from ditches to recreational services, the biggest issue on most people's mind was how soon schools will be expanded in northern Wayne County.

Darron Flowers of Fremont asked why the county was just now looking at school facilities when growth and overcrowding issues have been apparent for years.

Mr. **Smith** explained that the county has had several big projects that also need their attention and money, and that they cannot just favor one project over the other. "As a taxpayer myself, I want to know what the payment on the building is, as well as the operational cost," he said. "I want to know how building is going to affect the tax rate."

Another problem, he said, was getting information on not just what it will cost to build additional structures at a particular school, but also the cost of maintaining that structure. "We are just now getting estimates on operational costs for the proposed school projects in the county," he said. "We have gotten that, and sent it back to the school board for revisions, and we're meeting with our financial advisors about it."

He also said that the county is composing a prioritized list of all county projects is in the works now, including either an expanded or a new jail facility, as well as consolidated library facilities in the northern and southern ends of the county. "We don't want to promise you that a high school is going to get built a certain year, and then when that year gets there, we can't go any longer without a new jail," he said. "The local government commission won't let you build that much at one time, you have to spread it out. So we're trying to get a handle on everything we're trying to do."

Later in the meeting, Mr. **Smith** addressed a similar question on addressing classroom space in the county, and dealing with overcrowded schools in some areas while having open space in others. He said that, while he knows it is controversial, the schools have been asked to look at things like reassignment and year-round school. They are also examining the possibility of setting county-wide rules limiting the amount of mobile units schools can have before they must build more classrooms at the school. "We have asked the school board to look at all the ways that

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

we can utilize the schools better," he said, "and you can't do that without looking at some difficult options."

He said that in addition to adding classroom space, the board also has to look at what he calls the core of the school - facilities like cafeterias, media centers, and athletic facilities. He said that the capacity to increase the core must be there before more classroom space is added.

Mr. Flowers asked where exactly the county was in building schools. "Not to be disrespectful, but can you tell us when you are going to be able to build at each of the schools?" he said.

While he stopped short of putting exact years on construction, Mr. **Smith** did say that in the prioritized list from the school, building an additional building at Norwayne is second or third on the list, while building more space at CBA is sixth.

He added that plans for a two-story educational classroom were in the works for Norwayne. Vance Greeson of Pikeville then asked if American Disabilities Act (ADA) would be met in the two story structure, including putting an elevator in. Mr. **Smith** said the building would have to meet those standards to be approved.

School board member Dave Thomas, who also attended the meeting, added a little perspective to the situation in Northern Wayne County. "The high school has 1220 students right now," he said. "They have 305 students per lunch period in the original cafeteria built in 1961. There are 13 mobile units, and ten teachers without classrooms."

He also said that Aycock is the only high school in the county that only has one feeder school, and that he felt the need for a second middle school was on the horizon. Pikeville Mayor Herb Sieger asked why the county was committing money to libraries he didn't think were pressing, because there are already facilities in both Pikeville and Fremont, when schools so clearly need to be built.

Mr. **Smith** said that the county is working on a five-year plan and a 10-year plan for all county projects, and that it would be unfair to dismiss any needed projects. He also referred Mr. Sieger to library director Jane Rustin for more information on the libraries.

The school discussion ended with an emphasis on a proposed quarter-percent sales tax in the county that could be used to generate revenue for schools. "We've heard from a lot of people that they would rather see the sales tax than a proposed land transfer tax," he said, "and we think that would generate more revenue." He encouraged citizens to contact the commissioners with their thoughts on the tax, and thanked them for all their input during the meeting.

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

Wayne-Wilson News Leader (Fremont, NC)
May 25, 2006

Medicaid costs put county in a bind. Wayne seeking Medicaid spending cap

Author: Reggie Ponder

The Wayne County Board of Commissioners wants the public to understand the bind that the county is in because of Medicaid costs. The commissioners held a work session on Medicaid costs at their meeting Tuesday. The focus of the work session was informing the public about the Medicaid situation.

County Manager **Lee Smith** told the commissioners that county officials needed to watch the legislative short session "like a hawk." The legislators have a tough job because they have to find funding, he said. "The spiraling costs of Medicaid are crippling counties' ability to fund education such as school construction, teachers and classroom needs," according to a printed report that Mr. **Smith** presented to the commissioners. "Wayne County spends more for Medicaid than for school facilities." He said that Medicaid was a good program, but that the state-mandated payments were getting out of control. "There's a balance that we've got to find," **Mr. Smith** said. "And as commissioners, you've got a tough job ahead of you." Medicaid will cost county taxpayers more than \$7.5 million next year. That's a 77 percent increase since 2000.

The report indicated that 21.9 percent of the county's residents were Medicaid eligible, that 13 cents of the county's tax rate pays the county's mandated share of Medicaid, and that 9.1 percent of the county's current budget is required for Medicaid. The N.C. Association of County Commissioners' goal is the passage of legislation to implement a six-year phaseout of county participation in the costs of Medicaid. The association also wants the General Assembly to cap county costs at the fiscal year 2004-2005 level and provide relief by targeting supplemental financial assistance to any county in which more than a specified percent of the population is eligible for Medicaid. According to the association of county commissioners, the state has five counties that spend more on Medicaid than for their public schools current expense. Half the state's counties spend more on Medicaid than for public school construction and other capital expenses.

Commissioner Wilbur "Andy" Anderson said that Monday's work session was mostly to get the word out to the public. "This is a big issue," Mr. **Smith** said.

Projected Medicaid cost in the county is \$18 million by 2018, Mr. Anderson said. Officials need to work together as a team to resolve the issue, he said. "I don't know what the answer is," Mr. Sager said. But requiring Medicaid recipients to pay part of the bill, or changing eligibility requirements, might help. Illegal immigrants also are placing a burden on the Medicaid system, he said.

Mr. Sager said that he didn't want to deny care to anyone. He said that he just wanted to find a better way to handle it. He said that he was concerned about those on Medicaid, but that he also

Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)

was concerned about those whose incomes are barely above the Medicaid eligibility levels and who can't get care.

Mr. **Smith** said that county officials needed to remain engaged with state legislators as the General Assembly works on the Medicaid issue. Mr. Anderson said that he agreed with Mr. Sager's concern about those just above the Medicaid eligibility levels. Mr. **Smith** said that he and the commissioners received emails and telephone calls from families in the \$23,000-\$35,000 income range who say, "I'm dying." They are caught in a squeeze because they don't receive Medicaid and related services and are supporting those that do. In other matters, the board proclaimed May as "Mental Health Month."

County Manager **Lee Smith** said that if anyone had a complaint or issue with mental health services, to call 731-1133 and ask for "customer service" - "that is a brand new thing now across the state" - to report to Eastpointe Mental Health Services. "If something is going well we'd like to know that, too," he said. The board also proclaimed May as "Volunteer Month." The board unanimously awarded the banking services contract to BB&T on the staff's recommendation. Mr. **Smith** said that the finance office staff had done an excellent job reviewing the bids. Goldsboro attorney Phil Baddour was appointed to the U.S. Highway 70 Corridor Commission.

Mr. **Smith** was appointed to the Wayne County Development Alliance, Inc. Board of Directors. Mr. Anderson said that the county was beginning to see results of improvements to infrastructure. The county commissioners need to continue working with county citizens and keep them involved, he said.

"The sky's the limit in Wayne County," Mr. Anderson said. "I think we've got a very, very good future ahead of us." The Wayne County Board of Commissioners plans a bold effort to lobby the state legislature to cap county Medicaid spending and overturn a stringent environmental regulation.

During the commissioners' briefing Tuesday, held just before the regular board meeting, County Manager **Lee Smith** said that a "myriad of bills" had been proposed for addressing the county portion of Medicaid funding. "It will be a daily monitoring," he said of the county's role in watching the General Assembly. Capping county funding of Medicaid would help with local budget issues, he said.

Commissioner Munroe "Jack" Best blasted a recent increase in nitrogen runoff fees for developers. The fees, imposed administratively through a state regulatory agency, have increased from \$11 per pound to \$57 per pound of nitrogen. Mr. Best said that for one potential project, the cost increased from \$109,000 to \$634,000. He said that the nitrogen runoff regulations could stifle development in Wayne County. "If you're in the development business, this is a deal-breaker," Mr. Best said. "This is a deterrent to anybody to come to Wayne County because they can't afford it." The issue is job creation, Mr. Best said. The projects that the county has been working on could mean a thousand new jobs for the county, he said. "You've got a board up there that's made up of environmentalists and tree-huggers," said Borden Parker, county attorney.

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William Lee Smith
(Articles are in reverse chronological order)

The fees only affect counties in the Neuse River Basin. Mr. Best and Mr. **Smith** said that the Neuse Basin counties needed to present a unified front on the issue at the General Assembly next week. Many Neuse Basin boards of commissioners and economic development groups don't understand the issue yet, Mr. **Smith** said. "Everybody's just not jumping up and down on this, and this is a killer," Mr. **Smith** said. He said that the General Assembly needed to overturn the administrative rule. The board resumed discussion of the issue later on during the regular board meeting. "This is an absolute death notice for us," Mr. **Smith** said during the meeting. He said that protecting waterways was important, but that there needed to be some balance. "That has got to be fixed," he said.

Mr. **Smith** said that monitoring the legislature would be a constant task during the session. "We've got to be vigilant until the very last second," he said.

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

News Argus
April 24, 2005

County must make budget decisions

By Barbara Arntsen

For the past three years, County Manager **Lee Smith** has squeezed every penny the county spends and cut 7 percent of the county's labor force to keep from using money from savings. **Smith** and the county commissioners have managed to keep the general fund at a little over \$18 million, while still providing necessary services to the public.

But keeping the general fund at a level amount won't allow the county to accomplish long-term projects like building new schools, repairing and expanding water and sewer systems and providing quality health care services.

To adequately prepare for the future, the county has to add to its savings. That means the commissioners will have some tough decisions to make during budget talks this year. Can they add to the county's coffers to prepare for the future without cutting services or increasing taxes? When **Smith** began his job as county manager in 2002, he found that the county had reduced its general fund balance by almost \$12 million over the previous three years. And, **Smith** said, the 2002 expenditures were already over the budget projections.

Working with the finance office, **Smith** cut county expenditures by \$6.2 million between February and June 2002, thereby substantially reducing the amount of money the county would have to take from its savings.

Through the budget reductions, he said, the county only had to take about \$3 million from the general fund that year, instead of the projected \$9 million. "My goal then was to look at why there was such a drain on the fund balance and figure out how to stop it," he said.

Smith said that fund balances in all counties grew in the late 1990's because state reimbursements for various programs, like Medicaid and Medicare, were always coming in well over budget estimates. Those hefty reimbursements stopped by 2000, and counties were then faced with offering more health services with less money.

Smith looked at the county's audit figures over a 10-year period and found that expenditures were growing an average of around \$6 million per year. Revenue growth was not keeping up with expenditures, he said. That trend, **Smith** said, had to be reversed or the county would end up in financial trouble. "If you use your savings to buy groceries, or to pay the light bill, eventually you're going bankrupt," he said.

Revaluation of county property added almost \$3 million to the county's revenues, he said, which helped offset the original \$9.5 million over budget expenses.

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

So, when planning for the next year's budget, he budgeted to use \$4.2 million from fund balance, knowing the county would have to bring in revenues equal to that amount or risk draining its savings even more. "By the next year we had brought in revenues to cover that amount, plus we added \$25,000," he said.

Smith said that adding \$25,000 wasn't much in terms of "growing the fund balance" but said his goal had been to break even for that first year.

For the last two years, the county has kept its fund balance even at \$18.2 million by reducing general fund expenditures by 13 percent, cutting labor by 7 percent and increasing tax collection rates by almost 2 percent.

A budget that once ballooned at \$96 million is now at \$83.5 million. By maintaining the fund balance and reducing expenditures, the county was able to maintain its A+ rating when reviewed in 2004 by Standard & Poors.

Standard & Poors is an international company that provides independent credit ratings, risk evaluation, investment research, data, and valuations for government and corporations.

That A+ rating will help the county get the lowest interest rates when borrowing money, but the fund balance also has to increase to accomplish the projects facing the county.

"The more debt that you have, the more savings you must have," **Smith** explained. "Three years ago we were \$9.5 million off budget, which is 18 cents on the tax rate," **Smith** said. "Now, at year's end, we're very close to projected expenses."

Wayne County meets the state requirements for the money in its general fund, but is on the low end of what the state recommends.

"We're required to have at least \$13 million in there by the Local Government Commission," said **Smith**. "But they would like us to have between \$18 to \$22 million."

What the recommended budget will be for the county for 2005-2006 is still not known, because **Smith** and his staff are still meeting with department heads to hammer out the needs. And the county isn't expecting to receive the school's final budgetary needs until mid-May.

Some of the schools fiscal needs should become apparent next week when the commissioners and the school board meet for a day-long budget retreat.

**Internet – Newspaper Archives Searches
William Lee Smith
(Articles are in reverse chronological order)**

News Argus
May 19, 2004

County manager gets four-year contract

By Matt Shaw

The Wayne County commissioners agreed Tuesday on a contract for County Manager Lee **Smith**, his first since taking the job two years ago. The four-year deal does not change **Smith's** salary, currently \$92,000, or his benefits, although it does call for **Smith** to receive any cost-of-living increase given other county employees.

The contract's main benefit for **Smith** is that it protects him against an arbitrary decision by the commissioners to fire him. **Smith** would be due six months of severance pay and compensation for lost benefits if he's dismissed without good cause. **Smith** called the contract a vote of confidence.

Traditionally, managers have worked at the pleasure of the board, **Smith** said today. They could be fired "for any reason or even for no reason." In the last decade or so, more managers have sought contracts as a way to protect themselves and their families. About half the county managers in the state have contracts, **Smith** estimated.

Smith is the first Wayne County manager to have a contract. He also had one in Washington County, where he worked until taking the job here in late 2001.

Commissioners said they wanted to give **Smith** stability, especially with the chance that some commissioners will not be re-elected this fall. At least one new face is guaranteed in District 5, while three other incumbents face challengers.

Commissioner John Bell said that he'd like to give **Smith** a 10-year deal and then later joked, "We could do like they do in some Third World countries and make him manager for life." "Whether he wants to or not," **Smith** responded with a laugh.

The new deal, which runs through May 2008, says that **Smith's** salary will be set as part of the budget process. He will receive at least any cost of living pay increase given employees, but commissioners could decide to raise his pay more.

The manager also receives all county benefits, \$8,400 for travel, medical and dental insurance for both him and his family, and a 3 percent contribution to his 401(k) retirement plan.

Compiled By: Chris Nestman
Colin Baenziger and Associates



Section 12

William E. Sturgeon

*Fernandina Beach
City Manager Candidate Report*

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Cover Letter and Resume

Tavares, FL 32778
Tel: 352.978.8524
Email: wsturgeon1964@gmail.com

 www.linkedin.com/in/william-sturgeon-182130190/

WILLIAM STURGEON

Executive Manager & Leader

...Progressive Experience in Municipal Leadership, Emergency Services Management, and Fiscal Operations

Date: July 7, 2023

Colin Baenziger-Principal
Colin Baenziger and Associates
2055 South Atlantic Avenue, Suite 504,
Daytona Beach Shores, FL 32118

Dear Mr. Baenziger:

Please find attached my resume for the position of City Manager for the City of Fernandina Beach Florida. After reading the role description, I am confident that my background as an executive manager and emergency services leader provides me with the knowledge and insight needed to succeed in a role of this kind; allow me to explain.

Upon review of my resumé, you will see that I previously served as City Manager for the City of St. Cloud (FL). In this role, I established a reputation as a problem solver and innovator helping the municipality to establish a new vision for growth and an improved fiscal posture. Under my leadership, we instituted a series of reforms that allowed for the successful restructuring of debt, reduction of tax liability, and development of new initiatives aimed at stimulating the local economy. I also established synergies in the energy sector including a merger between the St. Cloud Utilities and the TOHO Water Authority, which resulted in lower costs and improved service delivery for residents.

Prior to my role as City Manager, I served as Fire Chief where I transformed operations and augmented our training infrastructure, making us a top performing fire departments in the state. I was also responsible for expanding the number of firefighters in our department and introducing a variety of programs to build on our successful model.

Currently, I serve as a consultant for Fitch & Associates—a global leader in emergency services consulting—where I advise organizations and municipalities on emergency management operations. While I've enjoyed this role, I am seeking an opportunity that will allow me to return to leadership where I believe my talents are maximized. I am, therefore, excited about applying for this role and look forward to speaking with you soon to discuss how I can help your organization achieve its strategic priorities.

Sincerely,

William E. Sturgeon

William Sturgeon MPA, CPM, ICMA-CM

Tavares, FL 32778
Tel: 352.978.8524
Email: wsturgeon1964@gmail.com

 www.linkedin.com/in/william-sturgeon-182130190/

WILLIAM STURGEON

Executive Manager & Leader

...Progressive Experience in Municipal Leadership, Emergency Services Management, and Fiscal Operations

Executive leader and city manager with 10+ years of experience stewarding municipalities towards improved financial and operational performance. Background includes multimillion-dollar budget accountability with a track record of fiscal discipline and forward-thinking revitalization strategies. Positioned the City of St. Cloud (FL) for robust and sustainable growth through innovative economic development, strategic long-term planning, austerity, and agile restructuring. Subject matter expert in emergency services operations and fire rescue with expertise consulting in the areas of crisis management, disaster preparedness, business continuity, risk mitigation, and financial management.

Executive Leadership
Municipal Administration & Management
Revenue Management
Budgeting
Strategic Planning & Partnerships
Debt Reduction

Organizational Development
Business Management
Capital Improvement Programs
Mergers & Acquisitions
Audit & Financial Reporting
Capital Improvement Programs

Emergency Operations
Crisis Management
Business & Data Analysis
Deal Structuring & Negotiation
Stakeholder Management
Policy Development

CAREER HIGHLIGHTS & AWARDS

Board Appointments

- Board Chair, Osceola Legislative Effort, 2021 – 2022
- Board Member, St. Cloud Regional Medical Center, 2015 – 2017
- President, Central Florida Fire Consortium Board of Directors, 2014 – 2016

Committees

- Osceola County Executive Policy Group, 2017 – 2022
- Advisory Member, Valencia State College Institute of Public Safety, 2014 – 2017

Awards

- Recipient of 5 GFOA Certificates of Achievement for Excellence in Financial Reporting and 2 Distinguished Budget Presentation Awards (FY 2021-2022).

Leadership

- Secretary, Florida Fire Chief's Association Executive Fire Office Section, 2014 – 2017
- Evaluation Team Member, Center for Public Service Excellence, 2008 – 2009
- Firefighter Safety through Advanced Research (FSTAR) Task Force, IAFC, 2015 – 2016

Fitch & Associates

Sr. Associate | 9/2022 – Present | Platte City, MO

Accountability: 15 Projects | 3 Markets

Leadership Context: Accountable for providing full-time consulting and project management services for multiple projects. Devise strategic plans, standards of cover, and staffing studies for fire and EMS organizations across the U.S.

Key Achievements:

- Partner with municipal-level stakeholders to provide strategies and solutions aimed at improving local fire and EMS response with double-digit improvement in operational outcomes across assigned cases.
- Engineer community risk reduction programs to help fire departments approach risk proactively for improved service delivery to their communities.

City of St. Cloud

City Manager | 10/2017 – 9/2022 | FL

Accountability: \$209M Budget | 755 Employees | 60K Residents

Leadership Context: Responsible for managing day-to-day operations of finance, procurement, HR, and information technology. Also accountable for parks and recreation, public works, environmental utilities, community development (planning, zoning, building, and code enforcement), fire/rescue, police, emergency management, and Dependent Special District (DSD) and Community Redevelopment Agencies (CRA).

Key Achievements:

- Introduced new vision and organizational culture for municipal operations supported by a performance-based five-year strategic plan and the introduction of intent-based leadership principles.
- Managed \$386.9M in land, buildings, intangible assets, infrastructure, machinery, and equipment including \$246.1M in water and wastewater funds. Also managed LTD of \$80.9M (of which \$74.5M were bonds).
- Reduced structurally imbalanced budget by \$10M (2017-2022); improved bond rating from A1 to AA2 and increased reserve funds to 3 months of operating expenses in all funds (general fund and restricted funds).
- Developed re-branding strategy aimed at accelerating economic growth; revitalized the downtown area using Community Redevelopment Agency (CRA) funding and city funding (\$20M) resulting in increased tax revenues.
- Led the city through the pandemic and established new resources including an incident management and communications team to provide real-time and accurate information to citizens and employees.
- Instituted an economic recovery team and grant program using economic development reserve funds; resulted in minimal business closures in the city. Stress-tested all funds and forecasted revenues.
- Oversaw the merger of St. Cloud Utilities and the TOHO Water Authority; improved intergovernmental cooperation between the School Board of Osceola County, Osceola County Government, and the City of Kissimmee.
- Renegotiated the City of St. Cloud & Orlando Utilities electric services contract resulting in a \$6M commitment to clean up the defunct plant and a 1/2% increase in Payment in Lieu of Taxes (PILOT) fees from OUC for utility franchise.
- Collaborated on community vision, strategic initiatives, roadway projects, utilities, and emergency operations (including Hurricanes Irma, Maria, and Dorian), and the COVID -19 pandemic.

St. Cloud Fire Rescue

I. Fire Chief | 9/2013 – 9/2017

II. Assistant Fire Chief | 3/2013 – 9/2013 | FL

Accountability: \$20M in Assets | 73 Firefighters | 20 Sq. Miles

Leadership Context: Responsible for overall operating performance of the department including staffing, deployment, and day-to-day operations.

Key Achievements:

- Implemented a strategic plan to facilitate organizational improvement leveraging a team-based approach involving a SWOT analysis, new mission and vision statement, and core values.
- Established a joint labor-management council to proactively address labor-management issues; initiative led to a harmonious working relationship with workers.
- Collaborated with the Osceola County Fire Chief and Kissimmee's Fire Chief to establish a county-wide Incident Command Manual (ICM) based on modern firefighting techniques using new research from NIST and UL.
- Developed and established improved training program including construction of a 5-story training building to meet ISO training requirements. Facility was state-certified December 2022.
- Authored a SAFER Grant for \$1.1M to hire nine firefighter/EMTs; grant was awarded in (2014); Awarded AFG Grant (2015) - \$55K for Wellness/Fitness Program.

Orlando Utilities Commission

Senior Safety Coordinator | 12/2011 – 3/2013 | FL

Accountability: 125 Employees

Leadership Context: Responsible for safety program development, training, accident investigations, inspections, and improvement of programs for water production, distribution, and chill water operations.

Key Achievements:

- Organized training of the internal emergency response team at the Stanton Energy Center (fire brigade, EMS, hazardous materials, and confined space).
- Assisted in the development and implementation of safety programs, policies, and procedures in multiple areas of operations to ensure compliance.

Future FD (DBA C3 Pathways)

Sr. Consultant | Instructor | 5/2010 – 5/2011 | FL

Accountability: Business development | Instruction

Leadership Context: Accountable for providing consultation on incident command, mass casualty incidents, and emergency management training using state-of-the-art computer technology and industry best practices.

Key Achievements:

- Delivered instruction for courses on mass casualty, firefighting, and unified incident command.
- Catalyzed business growth through the development of new marketing and business development strategies.

Orange County Fire Rescue Department

I. Division Chief | 11//2007 – 4/2010

II. Executive Battalion Chief | April 2005 – 11/2007 | FL

Accountability: \$10M | 9 Reports | +1500 Employees

Leadership Context: Provided leadership and direction for the department with a focus on ensuring optimal service delivery and training implementation for the division and command school. Responsible for developing budget presentations for the County Administrator, Mayor, and Board of County Commissioners.

Key Achievements:

- Led OCFRD to International Accreditation through the Center for Public Safety Excellence and Commission on Fire Accreditation International (CFAI). OCFRD was the 6th largest fire department globally to become accredited.
- Conducted legislative briefings for senior managers on issues related to EMS, Fire, and Emergency Management; developed county-wide risk analyses for fire protection systems and education programs.
- Created training program covering fire suppression, EMS, technical rescue, hazardous materials, officer development, incident command school, recruit/probationary training, and human relations.
- Appointed as the staff representative for the Orange County (City of Orlando) consolidation of services study commission which required interaction with elected officials, appointed officials, and external agencies.

Education & Certifications

- Master's in Public Administration, American Public University, Charles Town, WV (2011)
- Bachelor's Degree in Occupational Safety & Health, Columbia Southern University (2008)
- Degree in Fire Science, Community College of The Air Force, Alabama (1991)
- Credentialed City Manager: ICMA-CM

Professional Development

- Executive Fire Officer, National Fire Academy, Emmitsburg, MA (2009)
- Certified Public Manager, Florida State University, Tallahassee, FL (2015)

Memberships

- International City/County Managers Association

Candidate Introduction

William E. Sturgeon MPA, CPM, ICMA-CM

EDUCATION

Master of Public Administration, American Public University

Bachelor of Science, Occupational Safety and Health, Columbia Southern University

Certified Public Manager, Florida State University

EXPERIENCE

Fire and EMS Consultant	2022 – present
City Manager, City of St. Cloud	2017 – 2022
Fire Chief, City of St. Cloud	2013 – 2017
Senior Safety Coordinator, OUC	2011 – 2013

BACKGROUND

St. Cloud or Saint Cloud is a city in northern Osceola County, Florida. It is on the southern shore of East Lake Tohopekaliga in Central Florida southeast of Orlando. The City of St. Cloud's population is 62,000 people and encompasses over 20 square miles. The City operates under a Chartered Council/Manager form of government.

The City of St. Cloud's total budget (2022-2023) is \$209M and includes a General Fund Budget of \$63M and \$16M in Capital projects. Major projects included completing the expansion of city hall, revitalization of the downtown, Florida Avenue Trail (connecting the lakefront with the downtown), construction of new fire stations and construction of the seaplane base infrastructure. In 2022, St. Cloud entered into a multi-year management agreement with the TOHO water authority to manage St. Cloud Utilities resulting reduced water bills and improved regional services. The City has 662 funded positions. Of those, 521 are full-time and 141 are part-time. As City Manager, I supervised the Deputy City Manager, Assistant City Manager and 11 Directors.

The three most significant issues facing the City of St. Cloud were:

- Economic development and redevelopment: We were able to improve the economic trajectory of St. Cloud by leveraging Community Redevelopment Agency (CRA) and economic development funds to redevelopment the downtown. We also were able to secure funds for a seaplane base from the State of Florida and purchased additional park property (Hastings Ranch) which included a wedding pavilion and 100-acre pristine lake for canoeing and kayaking. We were able to attract numerous service-related businesses through expedited permitting and incentive packages.

William E. Sturgeon MPA, CPM, ICMA-CM

- Traffic and road infrastructure: Due to the rapid growth of the city and during the great recession (2008-2009) Osceola County did not collect any impact fees for roads during a ten-year period it was difficult to fund major roadway projects. Additionally, many major road networks were not the responsibility of the city, but we were able to overcome some challenges by innovative funding mechanisms and working with the county to be included in the decision-making processes about the roads in and around the city.
- Staff recruitment: Following COVID-19 and the great resignation, we found it difficult to recruit employees. We had to redefine our workdays, identify positions that could be performed remotely, and work from home policies. We also increased salaries after conducting a pay study to retain and recruit employees.

GENERAL, MANAGEMENT STYLE AND EXPERIENCE

When I read the posting, I felt my experience of being a city manager with significant development, redevelopment, economic development, utilities, infrastructure, public- safety and emergency management experience would serve the City of Fernandina Beach very well. Additionally, I am a subject matter expert in Strategic Planning, and I have had experience managing multiple projects. I have a demonstrated history of building high performance teams by providing leadership by example, championing customer service (internal and external), training and education. I am a problem solver and creative by nature. Finally, I have experience leading efforts in planning and constructing new facilities and/or upgrading existing facilities.

My management style is known as “caring by walking around.” I do not sit in my office, and I make sure that I have a clear understanding of ongoing issues and make sure my team members have the resources and support they need to do their jobs. I am a hands-on manager and will be more so in a smaller municipality.

My leadership style is known as “leadership by intent” and is based on three principles: competence, clarity, and control. One of the most important duties that a City Manager has is to hire subject matter experts to lead and manage the multitude of services a city provides. Secondly, my role is to develop the city team members into a cohesive unit that provides effective and responsive government. Clarity is achieved by developing a common vision, mission and core values that drive the decision-making processes required to run a municipality. Finally, team members should be trained and expected to make decisions and address issues at the lowest level of the organization. This requires proper training, exceptional trust, and support.

My staff would tell you that I expect them to do their jobs and hold them accountable for results. I am firm, fair, and consistent and emphasize education and training. I also encourage and expect descent and want to be intellectually challenged, this results in better outcomes for the organization.

William E. Sturgeon MPA, CPM, ICMA-CM

My former City Council Members would tell you that I am a leader, and I am able to remain calm under pressure. They would tell you that I am decisive and have a keen ability to manage crisis situations and that I am candid and kept them fully informed about significant issues facing the city.

My strength is my decisiveness. I have an innate ability to process information rapidly and make solid decisions. This attribute comes from my many years of experience in public safety. Secondly, I am very empathetic, and I can see different perspectives of an issue from “their” point of view. Finally, I am a diplomat and make every effort to look for a win-win in any given situation.

My weakness is that I tend to get impatient with government processes. However, recognizing that as a weakness, I set realistic timelines and provide clear expectations of tasks and what success looks like for the organization. My other weakness is that I take ownership of all issues in an organization and that can take a personal toll on my own well-being. But I have learned to hold the proper people accountable while remaining responsible and not taking it personally.

From an organizational perspective, I utilize the strategic plan and work plans for each department to make sure city goals and objectives are being met. I also look at (continued) Key Performance Indicators (KPIs) to measure the effectiveness of municipal programs. Personnel effectiveness is measured using ongoing feedback as well as evaluations.

My biggest success was professionalizing the staff and bringing leadership stability to the city of St. Cloud. This accomplishment set the city up for many years of success even during challenges that a municipality will face. I was able to accomplish this transformation by emphasizing training/development, leadership by example, and by engaging my team in problem solving and decision-making processes thus building a team of reliable professionals.

My biggest failure was when I first became the City Manager, I had a very poor relationship with a City Council Member. The relationship deteriorated to the point it was discussed during a City Council meeting. While the remaining members supported the City Manager, and we were directed to work together it did remain a strained relationship. What I learned during this time is that it is the responsibility of the chief executive to maintain a working relationship with all members even if they disagree with a decision I make.

As a City Manager, I have had to terminate employees and all my terminations were handled with dignity and professionalism. Terminating someone’s employment is always difficult unless it involves illegal activity or ethical issues. I work with an employee by being direct and applying progressive discipline including providing proper training to give them every chance of being retained. I have an outstanding track record of being fair and consistent in all employee actions.

William E. Sturgeon MPA, CPM, ICMA-CM

One of the challenges of a new manager is building relationships with City Council, staff and a multitude of other stakeholders that will be necessary to accomplish the goals and objectives of the city. Relationships are built on trust and the understanding of issues. Secondly, is adapting to new processes and procedures of a new city. Lastly, assisting staff with the idea of change.

In the first six months in Fernandina Beach, I would:

- Build relationships with elected officials, staff, citizen groups, and reaffirm previous relationships with county and state officials.
- Review and assess city operations, address immediate concerns, and be approachable to citizens, council members and staff.
- Refine the strategic direction of the city.
- Establish expectations and further define city council and staff expectations of the city manager.
- Continue to review and assess the City's financial position, goals, and objectives.
- Conduct area familiarizations of the city and surrounding communities.
- Meet business owners and service club representatives.
- Meet with County Commissioners, appointed and elected officials in the surrounding counties and surrounding cities.

I work well with the media; I am very comfortable on camera and speaking with reporters. I am always approachable about city issues. I keep the City Council fully informed of all media inquiries and I always provide the proper information to the press. I have no press-related issues that would embarrass your client.

I am very astute with social media (SM) and understand that it is the new public square. I also believe that it should be used to disseminate information to the public and should not be used as a place to engage in debate with the public. It should be used judiciously and cautiously due to public record requirements. In my previous city, we used SM extensively to keep the public informed about events, meetings, and services.

I do not anticipate anyone contacting city officials with negative comments about me other than the possibility of former contract employee that I terminated their employment contract for cause, who has made several attempts to defame my character on social media and filing frivolous complaints against me.

I am an avid golfer and reader.

The challenges I see facing the City of Fernandina Beach are:

- Maintaining a small-town feel, while engaging in responsible growth.
- Protecting the environmentally sensitive area.

William E. Sturgeon MPA, CPM, ICMA-CM

- Sustainability- economic, financial (city), environmental and workforce.
- Flood mitigation and resiliency.
- Land availability for managed growth.
- Infrastructure replacement (city hall and community Centers).
- Ensuring golf course and marina sustainability.

SIX ADJECTIVES OR PHRASES I WOULD USE TO DESCRIBE MYSELF:

- Decisive
- Empathetic
- Innovative
- Professional
- Humorous
- Persuasive

REASON FOR DEPARTING CURRENT POSITION

Currently, I serve as a consultant for Fitch & Associates—a global leader in emergency services consulting—where I advise organizations and municipalities on fire and EMS operations. While I’ve enjoyed this role, I am seeking an opportunity that will allow me to return to leadership where I believe my talents are maximized.

CURRENT / MOST RECENT SALARY

My salary at Fitch & Associates is \$117,000 and my final compensation at The City of St. Cloud was \$167,000 including a vehicle allowance.

CB&A Background Checks

**Background Check Summary for
WILLIAM “BILL” EDWARD STURGEON**

Criminal Records Checks:

Nationwide Criminal Records Search	No Records Found
County	
Lake County, FL	No Records Found
Osceola County, FL	No Records Found
Orange County, FL	No Records Found
Seminole County, FL	No Records Found
State	
Florida	No Records Found

Civil Records Checks:

County	
Lake County, FL	No Records Found
Osceola County, FL	No Records Found
Orange County, FL	No Records Found
Seminole County, FL	No Records Found
Federal	
Florida	No Records Found

Motor Vehicle

Florida	No Records Found
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Credit

Excellent

Personal Bankruptcy

September 1996 – Bankruptcy, Chapter 7
April 1997, Terminated

**See personal disclosure for candidate
explanation for record found*

Sex Offender Registry

Not Listed

Education

BS & MPA Confirmed, Degree from
Community College of the Air Force Pending

**Background Check Summary for
WILLIAM “BILL” EDWARD STURGEON**

Employment

Confirmed, except for Fitch &
Associates (09/2022 – Present)

Social Media

Nothing of Concern Found

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

**Background Check Summary for
WILLIAM "BILL" EDWARD STURGEON
Personal Disclosure**

Personal Disclosure Questionnaire

Name of Applicant: William E. Sturgeon

The following questions are designed so that we will be able to make full disclosure to our client concerning your background. Please answer them honestly. Cutting corners or misrepresenting your past will result in you being eliminated from all further searches conducted by this firm. We understand that frivolous charges are sometimes made and that charges do not mean you were guilty. We also understand that you may have been wronged and needed to seek compensation. The bottom line is that we want to be certain that our client is fully informed. If you have any questions, please contact us for clarification.

Please explain any yes answers on a separate sheet of paper.

1. Have you ever been charged or convicted of a felony?
Yes ☐ No ☒
2. Have you ever been accused of or have been involved in a domestic violence or abuse incident?
Yes ☐ No ☒
3. Have you ever declared bankruptcy or been an owner in a business that did so?
Yes ☒ (1997) No ☐ (see attached explanation)
4. Have you ever been the subject of a civil rights violation complaint that was investigated or resulted in a lawsuit?
Yes ☐ No ☒
5. Have you ever been the subject of a sexual harassment complaint that was investigated or resulted in a lawsuit?
Yes ☐ No ☒
6. Have you ever been charged with driving while intoxicated?
Yes ☐ No ☒
7. Have you ever sued a current or former employer?
Yes ☐ No ☒
8. Please list links to all your social media accounts (Facebook / Instagram / LinkedIn / Twitter, etc.) and your personal web page if you have one.
Facebook-<https://facebook.com/sturgeow>
LinkedIn: www.linkedin.com/in/william-sturgeon-182130190/
9. Is there anything else in your background that, if made public, would cause you, our client or our firm embarrassment if it came to light through the press or any other mechanism?
Yes ☒ No ☐ (see explanation)
10. Please provide a list of any lawsuits in which you are or have been a party either as plaintiff or defendant.
Yes, for wrongful termination in regard to the above mentioned termination. Please contact Attorney Stephanie Brionez (contracted city attorney) for additional questions: (352) 455-0826

Attested to: William E. Sturgeon
Signature of Applicant

**Background Check Summary for
WILLIAM "BILL" EDWARD STURGEON
Personal Disclosure Explanation**

Fernandina Beach
City Manager Candidate
William E. Sturgeon

July 17, 2023

Reference Check question items # 3 and # 9

To Whom It May Concern:

I wish to provide additional clarification to Personal Disclosure Questionnaire:

3- My wife and I filed bankruptcy in 1997 on the advice of my attorney, when my ex-wife sued us for the back taxes, insurance, and mortgage payments of my previous marital home.

#9- While serving as the City Manager for the City of St. Cloud, a former contract employee that I terminated his contract for cause filed a frivolous ethics complaint with the State of Florida. The State Ethics Committee found that there was "No Probable Cause" and dismissed the complaint. I have attached the Public Report for your review.

Sincerely,



William E. Sturgeon

COMMISSION ON ETHICS

In re WILLIAM E. STURGEON,
Respondent.

PUBLIC REPORT

ORDERED by the State of Florida Commission on Ethics meeting in executive session on
October 19, 2018.

October 24, 2018
Date

Guy W. Norris
Chair, Florida Commission on Ethics

cc: Ms. Stephanie J. Brionez, Attorney for Respondent
Mr. Mark A. Brionez, Attorney for Respondent
Ms. Melody A. Hadley, Commission Advocate
Mr. Christian B. Robertson, Complainant

CB&A Reference Notes

Reference Notes
William Sturgeon

Linette Matheny – Council Member, City of St. Cloud, FL 407-288-9359

Aside from being the Assistant County Engineer for Osceola County, Ms. Matheny is elected to the St. Cloud Council. She made the motion to make Mr. Sturgeon the City Manager in 2017 and has not regretted her decision. Mr. Sturgeon made a great City Manager. She has never met anyone else who is as caring for his employees as he is. He is excellent at supporting his employees and encouraging them to develop their skills and grow as individuals and as a team.

Mr. Sturgeon is innovative. He thinks outside the box and finds new solutions. He came up with a city version of “Undercover Boss” where he made it his mission to work with every department, although not incognito, and try to learn what they do, what their challenges are, and then go back to the city council and find ways to better work with and support each department. Each department looked forward to their turn for his workday with them and it brought great results both within the morale of each department and in bringing inclusiveness and a greater sense of teamwork and cooperation within the city.

Because of Mr. Sturgeon’s history as Fire Chief, he is very calm and collected in crisis situations. He is good at deescalating situations and listening to irate residents. He is nice and respectful when interacting with the public. He is an easy person to talk to and makes people feel comfortable and at ease.

When St. Cloud had a problem with their water system, Mr. Sturgeon organized a big public meeting with over 200 upset citizens. He listened to all the complaints and handled the situation very professionally. He was respectful to everyone. After the meeting he brought together the best task force and brought in an outside firm to come in and evaluate the water system. He introduced innovative technology to correct the situation and made sure the problem was thoroughly researched and corrected.

Mr. Sturgeon is a strong leader. He transitioned quickly from Fire Chief to City Manager. Ms. Matheny would hire him again without any hesitation. He will continue to excel as a Manager wherever he goes.

Words or phrases used to describe William Sturgeon:

- Professional,
- Committed,
- Calm,
- Cool,
- Collected, and
- Caring.

**Reference Notes
William Sturgeon**

Strengths: Cares for the people with whom he works.

Weaknesses: Because he cares so much about his people, he might be a little blind to little issues because he gives everybody the benefit of the doubt.

Kolby Urban – Council Member, City of St. Cloud, FL 407-908-4172

Mr. Urban has known Mr. Sturgeon since the latter was hired as City Manager in 2017. Mr. Sturgeon is an excellent leader. He brought a specific set of leadership skills and expertise to the city, particularly from his public safety background. Mr. Sturgeon was always very willing to help and put in extra time and effort to make sure the job was done correctly.

Mr. Urban worked very closely with Mr. Sturgeon as the City Manager reports directly to the City Council members. The City Manager also manages the city employees, and he maintains communication between the two groups very well. He makes good decisions generally and is innovative in his ideas.

During his time as City Manager, the city had a crisis with the water quality. Mr. Sturgeon quickly stepped in and came up with innovative solutions to quickly resolve the problem. He handles stressful situations well. He is calm and collected under pressure. He makes thoughtful decisions, and most would not be able to tell he was even under any stress because of how calm he remains. His background as Fire Chief is very helpful in that regard. He is someone to look to in stressful situations.

Mr. Sturgeon is a leader. He is frequently in the community. The residents love him, and he is very open and willing to talk and discuss any issues with the residents regardless of who they are or what the issue is. He is an involved manager. He does not simply stay behind his desk managing the processes. He is willing to get in front and get his hands dirty. He implements his vision for what the city wants to do.

Mr. Sturgeon has not been involved with anything controversial or embarrassing regarding his personal or professional life. Mr. Urban would hire Mr. Sturgeon again if given the opportunity. He recommends Mr. Sturgeon to manage any community.

Words or phrases used to describe William Sturgeon:

- Timely,
- Leader,
- Calm,
- Open,
- Involved, and
- Interactive.

Reference Notes William Sturgeon

Strengths: Leader in the community.

Weaknesses: None identified.

Dave Askew – Former Council Member, City of St. Cloud, FL 407-414-5207

Mr. Askew worked with Mr. Sturgeon from 2017 to 2022. Mr. Sturgeon was an excellent leader. The city staff adored him, and the citizens appreciated his ability to communicate with them and listen to their concerns. If there was a problem, he did not make a snap decision. He took the time to learn about the issue and made quality decisions regarding it.

Along with being a council member, Mr. Askew owns a jewelry shop less than two blocks away from the city office buildings, so he heard many complaints from the public about the previous City Managers. He did not hear anything negative about Mr. Sturgeon. Both the city employees and the community loved him. Mr. Sturgeon was very accessible and has an open-door policy. Anyone could call him at any time, even while he was on vacation. He made good decisions for the city both as Fire Chief and as City Manager.

Mr. Sturgeon is smart and innovative. He does not try to do everything by himself or to reinvent the wheel. He brought in a full-time employee to help with the city's social media and communication outreach with the residents, because he knew that he could not do that on his own. Although he can be in front and leading the charge on initiatives, he prefers to be in the background, and managing the processes while letting others shine. His staff appreciates and respects him as he does not take the glory away from those who are doing the work. He surrounds himself with quality people and operates in a teamwork environment.

Although Mr. Sturgeon is no longer City Manager for St. Cloud, he left on good terms, and the city invited him back to be the Grand Marshall of the parade. The Assistant City Manager he hired and trained is now the City Manager and is doing an excellent job, thanks largely in part to Mr. Sturgeon's decision to hire her and then mentor her. Any community would be lucky to have him as their Manager.

Words or phrases used to describe William Sturgeon:

- Cared about the city,
- Hard worker,
- Smart,
- Innovative,
- Go-getter, and
- Relentless.

Reference Notes
William Sturgeon

Strengths: People person. As a City Manager, Mr. Sturgeon sees all the highs and lows. He can take the difficulties that come with the job and turn them into a positive.

Weaknesses: None identified.

Keith Trace – Former Council Member, City of St. Cloud, FL 321-624-3126

Mr. Trace was a Council Member from 2018 to 2022 while Mr. Sturgeon was City Manager. Mr. Trace was impressed with Mr. Sturgeon's job performance. They interacted very closely while Mr. Trace was Council Member, with weekly, if not daily communication.

Mr. Sturgeon made good decisions. Of course, everybody makes mistakes and cannot be perfect all the time, but Mr. Sturgeon did an excellent job in figuring out what the issues were and how to best address them while keeping the desires and the goals of the council members in mind during the whole process. He improved during his tenure at providing the needed information and then letting the city council members make the final decisions. At first, he tried to do everything himself, but he quickly learned what his duties were and did a great job in putting together the analysis, training the staff on what they needed to know, and then presenting the information to the city council for a decision.

Mr. Sturgeon has a strong leadership style. He preferred to be out in front, rallying the troops, rather than in the back, managing the processes. Anytime there was a big problem or a transition, he made sure to bring the rank and file on board and communicate with the necessary participants. He kept the Council Members up to date with everything. He was prepared at meetings and communicated his thought process very clearly and eloquently.

Mr. Trace would hire Mr. Sturgeon again and is not aware of anything controversial or embarrassing in Mr. Sturgeon's public or private life. He would be a good Manager elsewhere.

Words or phrases used to describe William Sturgeon:

- Problem solver,
- Focused,
- Determined,
- Goal oriented,
- Communicative, and
- Leader.

**Reference Notes
William Sturgeon**

Strengths: Great at organizational leadership and mentoring staff who were coming up through the ranks.

Weaknesses: He essentially did on-the-job training. He was put into the position before he fully had a grasp on what all the responsibilities of City Manager were. He is a quick learner and figured it out quickly.

Bruce Vickers – Tax Collector, Osceola County, FL 321-624-5920

Mr. Vickers has known Mr. Sturgeon for a long time, at least since the latter was Fire Chief starting in 2013, but probably longer than that. Mr. Sturgeon became Manager of St. Cloud at a time that they greatly needed him. He is level-headed and good at making quality decisions, which made a huge difference for the city, especially coming after someone who caused some chaos in the city. Mr. Sturgeon smoothed things over within the city offices. The department heads worked with Mr. Sturgeon directly on various projects. He is communicative and an upstanding member of the community. He was as asset for the city.

Mr. Sturgeon is adept at calming combative people down. Mr. Vickers is not a county or city employee, but he provides services such as issuing birth certificates and other necessary items and has an office at City Hall. One of the newer City Council Members did not like that tax collectors had an office in the city building because they were not technically city employees. Mr. Sturgeon was quick to show how the city reaped the benefits of the tax collection department by bringing people down to the city every day to use their services. He had a personal conversation with the city council member in question, and by the time it came to vote on the issue, it was a unanimous vote that the tax collectors remain in the city hall.

Mr. Sturgeon is calm, cool, and collected in stressful situations. He keeps people calm and does so with grace and ease. There is nothing controversial in his background. He always presented a clean budget and made things much easier and better for the city and the county. Whoever hires him as their Manager will be the benefactors of his skillset.

Words or phrases used to describe William Sturgeon:

- Sincere,
- Calm,
- Communicative,
- Level-headed,
- Upstanding, and
- Intelligent.

**Reference Notes
William Sturgeon**

Strengths: Has a servant's heart and mind. Coming from a Fire Chief mindset, he sincerely wants to help people. Surrounds himself with good staff who helps him achieve the city's objectives.

Weaknesses: Because he always wants to say yes and help people, he can sometimes be stretched too thin. He can handle the work, but sometimes he could delegate a bit more.

Keith Ronan – Vice President, Positively Osceola, Osceola, FL 407-791-5215

Mr. Ronan has known Mr. Sturgeon since 2015 as both Fire Chief and then as City Manager for St. Cloud. Mr. Sturgeon exceeded expectations in every way possible. He was a clear thinker in emergencies, built a strong team around him, and respected everyone with whom he interacted.

Mr. Sturgeon was proactive in communicating with the public. He reached out to the various news organizations and told them what was happening in the city. He was in touch with Mr. Ronan and others constantly. He had a good relationship with the residents. He was frequently at events, including during COVID, which complicated matters more so than usual. He was always available for a phone call or a visit to his office.

During COVID there were additional challenges for Mr. Sturgeon as City Manager. However, he cooperated well with other organizations and relied on agencies such as law enforcement, and health-based agencies in the region to collaborate and present a unified approach. He also utilized the media well during that time and kept the elected officials in the loop. He was accessible and knowledgeable about where the city was in terms of risk management. He was always at the emergency operation center staying on top of the situation. It was a difficult situation overall and he managed through it very well.

There is nothing embarrassing in Mr. Sturgeon's background. He is an open and upfront person. He makes everyone feel like he is there for them and cares about them individually. He brought a steady hand to the organization. He does not jump into the politics. The city brought him on because he was a steady force and knows how to work in a healthy way with a number of different entities. He respected his staff and did a good job in balancing the staff and the elected officials. He built a good team that continued to function well even after he moved on. Mr. Ronan recommends him as a Manager for any community.

Words or phrases used to describe William Sturgeon:

- Forward thinking,
- Eyes wide open,
- Respected others,
- Team builder,
- Positive, and
- Proactive.

Reference Notes
William Sturgeon

Strengths: Always very positive and truthful.

Weaknesses: He did not live in the city which was challenging at times but did not impede his commitment to the city.

Dan Mantzaris – City Attorney, City of St. Cloud, FL 407-492-7518

Mr. Mantzaris is a partner in a law firm in downtown Orlando. He has known Mr. Sturgeon since 2013 when he was Fire Chief, and then as City Manager for St. Cloud. He had a good job performance during that time. He was an extremely qualified fire chief and emergency management personnel. He brought many good things to the city when he became City Manager. Even though the role of City Manager was outside the box for Mr. Sturgeon, he embraced the challenge and learned about everything in his field and did his role very well.

Mr. Sturgeon is an out-front leader. Because of his previous role as Fire Chief, he was comfortable being in the front of a stressful situation and quickly taking control. When the city had a problem with water quality issues which were getting a great deal of bad press, he could have deferred all the limelight to the experts, such as the public works director. But he was the one who stood at the podium and responded to the critiques. He was the face of the problem and took the brunt of the criticism from the public. His leadership style helped reduce the public concern for that problem and was respected and appreciated by the city staff and department heads.

Mr. Sturgeon is a strong leader, but not a micromanager. He pushes the upper management level directors to do their own research, analyze, and make their own decisions. He does not get in their way. He makes himself available to both his staff and the public. When citizens ask questions at the city council meetings, he hands them his business card and invites them to call him the next day so they can discuss the topic further.

Mr. Mantzaris would absolutely hire Mr. Sturgeon. He took over a position that was in disarray from the previous few managers who mishandled the office and moved it in the right direction. If a community needs a good manager to fix a messy situation, Mr. Sturgeon is the man for the job.

Words or phrases used to describe William Sturgeon:

- Focused,
- Reliable,
- Impressive,
- Leader,
- Available, and
- Balanced.

**Reference Notes
William Sturgeon**

Strengths: Mr. Sturgeon is a good listener, which is especially important when listening to Mr. Mantzaris, who provides legal counsel to the city. Mr. Sturgeon listens and digests what he has to say.

Weaknesses: He tries too hard to make everyone happy. He wants to make sure everybody is on board with something before moving forward or with an issue that has a certain amount of conflict, he wants to fix it all and make everyone happy. His effort may be better spent elsewhere.

**Dirk Webb – Executive Director, St. Cloud Chamber of Commerce, FL
407-892-3671(office) 765-617-7417(cell)**

Mr. Webb worked with Mr. Sturgeon from 2019 to 2022. He had a good job performance as City Manager. He was approachable, looked for ways to collaborate, and supported the community.

Because Mr. Webb's responsibility was to help promote St. Cloud, their work together was project based. They either worked together frequently for one month, or hardly at all the next month, based on what was happening within the city. On average, they had at least monthly interactions. Mr. Sturgeon was often out in the community. He always showed up to events including ribbon cuttings, legislative events, and social functions. He represented the city well.

Mr. Sturgeon is collaborative and innovative. He is forward-thinking and did a great job of expanding some of the first response teams in the community. Their community is one of the fastest growing in the United States. Over 1,000 people move into Central Florida each week. He had to be forward thinking to deal with that kind of growth. He empowers his employees to be the best in their arena of influence. He tells them what he needs and expects them to get the job done. He gives them good direction and the support they need to accomplish their tasks. He does well under pressure, especially during hurricane season. He collaborated with Osceola County and the City of Kissimmee to lead crisis teams and to provide a unified front in the wake of disasters. He led the "We open safely" campaign during COVID and was a strong face of leadership that people could look to for guidance.

Mr. Sturgeon has excellent financial skills. As City Manager he managed a \$179 million budget, and the money was always appropriated in the right places. He worked closely with the financial department to make sure everything was handled appropriately. Mr. Webb does not hesitate to recommend him as a Manager for any municipality.

Reference Notes William Sturgeon

Words or phrases used to describe William Sturgeon:

- Communicative,
- Thoughtful,
- Deliberate,
- Calm,
- Patient, and
- Approachable.

Strengths: Took the time to do things by the book and methodically. He used common sense and was a people person.

Weaknesses: None identified.

Hughette Crumpler – Community Activist, City of St. Cloud, FL 407-906-8826

Ms. Crumpler is a retired Vice President of Human Resources of a New York Stock Exchange company. She retired in 2008 and returned to her hometown of St. Cloud in 2012. Her family grew up in the city and has been there since the 1800s. Because of that she has a great deal of vested interest in making sure the city runs well. She has known of Mr. Sturgeon since he was hired as Fire Chief in 2013, but interacted with him more closely when he became City Manager in 2017. She is an active citizen in the town who served on several committees, including the committee which oversaw the search for a new City Manager when they ultimately chose Mr. Sturgeon. Mr. Sturgeon was a ray of sunshine for the city. He has excellent leadership skills with a tremendous amount of depth of experience. He helped St. Cloud in many ways, but especially during a time of great transition with much growth.

Mr. Sturgeon was an excellent leader. He did an outstanding job in developing his Assistant City Manager, so much so that she is now the current city manager because he helped prepare her so well. Over several years, she earned all the necessary certifications through his help. Mr. Sturgeon's ability as a leader to develop people under him is an integral part of his success. He is self-assured and strong, but he lets others get the credit for their own work. He lets others shine and does not need to be in the spotlight.

Mr. Sturgeon makes great decisions in hiring personnel. When they had many complicated water quality issues, he was not afraid to replace some of the current staff who were not doing a good job and to bring in newer, more up to date employees. He brought in consultants and water experts to quickly and efficiently solve the issue and get the city back on track. He knows how to identify, develop, and put out a high standard of professional individuals.

As City Manager, Mr. Sturgeon had to deal with a certain level of criticism and complaints from the citizens of the community. There are always people who do not like the outcome of a

Reference Notes William Sturgeon

decision or who blame him for the direction the city is going. He handled the criticism very well and was a professional in every sense of the word.

Mr. Sturgeon was an excellent City Manager for St. Cloud. He has a depth of experience, the necessary certifications, and is honest and ethical. He will be an asset wherever he goes.

Words or phrases used to describe William Sturgeon:

- Calm,
- Self-assured,
- Comfortable,
- Approachable,
- Professional, and
- Honest.

Strengths: Integrity and leadership skills.

Weaknesses: Because Mr. Sturgeon had to deal with a tough group of board members, she wished he were more forceful at times, although that is not part of his job. He knows where his limits are and stayed within his boundaries.

Paula Stark – Executive Director, St. Cloud Main Street, FL 321-442-3191

Ms. Stark works directly with Mr. Sturgeon as the Executive Director of the St. Cloud Main Street national program. They work with state coordinators to help the community-based organization preserve the city's historic downtown. She has known Mr. Sturgeon ever since he was the Fire Chief starting in 2013 but worked more closely with him as City Manager between 2017 and 2022.

Mr. Sturgeon is very aware of what is happening in his community. He is approachable and closely interacted with Ms. Stark with the Main Street national program. She consulted with him often as it related to projects and programs in the city and who was going to have what role in coordinating and negotiating agreements between the city and the organization in general. He answered to the city council, and they all worked together to create a thriving organization.

Mr. Sturgeon is innovative. He took steps to ensure that his staff members had access to additional training to bring them to different levels and to improve the situation for the staff in general and individuals personally. He was an excellent leader. He shifted gears as needed. He led when it was his role to lead, and other times took steps back to let others lead when appropriate.

Reference Notes
William Sturgeon

Mr. Sturgeon is customer service oriented. People are interested in what he has to say, and he makes himself available to the residents. As City Manager, he is always subject to political difficulties that happen around him. He knows how to conduct himself appropriately in challenging situations. He never lost his cool and was always able to step up and respond to the situation in an appropriate way. He has not done anything that would be cause for embarrassment for a future employer. Any city or county who hires him will be happy with the selection.

Words or phrases used to describe William Sturgeon:

- Customer service oriented,
- Communicative,
- Innovative,
- Approachable,
- Interactive, and
- Professional.

Strengths: People are comfortable going to him in reference to anything, even in a situation where it may not be as important or urgent an issue. He treats them and their concerns just as important and relevant as anyone else's.

Weaknesses: Too nice.

Prepared by: Amanda Jenkins
Colin Baenziger & Associates

CB&A Internet Research

Internet – Newspaper Archives Searches**William (Bill) Sturgeon***(Articles are in reverse chronological order)*

<https://fitchassoc.com/team-members/william-e-sturgeon-mpa/>

Fitch & Associates

September 2022

William E. Sturgeon, MPA

Senior Associate

During his distinguished 35-year public safety career, **William E. Sturgeon, (Bill)**, MPA, CPM, EFO, EMT-P, ICMA-CM, has served volunteer, military, municipal, and county fire rescue organizations and held many titles including: Firefighter/Paramedic, Aircraft Crash Rescue Firefighter, Flight Paramedic, Hazardous Materials and Technical Rescue Specialist, EMS Supervisor, Instructor, Company Officer, Shift Safety Officer, Battalion Chief, Assistant Chief, Division chief, Fire Chief and City Manager. In 2007, as the Accreditation Manager for Orange County Fire Rescue (OCFRD) Florida, he successfully led OCFRD to CFAI accreditation.

In 2013, **Bill** was appointed as the Assistant Fire Chief for St. Cloud Fire Rescue and six months later he was appointed to the Fire Chief's Position, where he took his vast experience and diverse knowledge to transform St. Cloud Fire Rescue into a modern fire rescue department. From July 2017 until August 2022, he served as the City Manager where he oversaw a \$209M budget and 755 employees of the ninth fastest growing City in the United States and the second fastest in the State of Florida. Under his leadership the city to improved its strategic focus, financial position, bond rating, public safety services (emergency management, fire, EMS, and police), revitalized the downtown, established a sea plane base, rebranded the city, improved staff training and customer service.

Bill Holds an associate degree in Fire Science from the Community College of the Air Force, a bachelor's in occupational safety and Health from Columbia Southern University and a Master's in public administration from American Public University. He is a credentialed City Manager (ICMA-CM), Certified Public Manager and a Graduate of the Executive Fire Officer (EFO) Program at the National Fire Academy. **Bill** is also known for his common-sense approach to problem solving, crisis management, and strategic thinking skills.

Internet – Newspaper Archives Searches**William (Bill) Sturgeon***(Articles are in reverse chronological order)*

WFTV 9 (FL)

August 1, 2022

St. Cloud offers marketing boost to business owners hammered by construction

Author: Gene Saladna

Construction in downtown St. Cloud has been a headache and a challenge for some business owners. And the city knows it. On Monday, city leaders announced some potential relief for businesses impacted by the ongoing improvement work. The city will offer marketing grants of up to \$1,000 each to help downtown businesses that are struggling amid the construction woes. “Although ultimately, the revitalization project will be a boost for downtown businesses, they are telling us that many of their customers aren’t coming in right now because of the construction project, and the businesses are hurting,” City Manager **Bill Sturgeon** said.

St. Cloud has allocated \$50,000 in grant funding for the project. Officials said the grant program is authorized under the COVID-19 Economic Recovery & Stimulus Program that dates back to 2020. To qualify, registered businesses must have no outstanding debt to the city and must be located in the Entertainment District, an area generally defined by the city as:

- North: 9th Street
- East: Florida Avenue
- South: 13th Street
- West: Massachusetts Avenue

Business owners can submit applications until Sept. 15 or until all funds are awarded. “We are hopeful that these dollars will help them create marketing campaigns to encourage those customers to come back,” **Sturgeon** said.

**Internet – Newspaper Archives Searches
William (Bill) Sturgeon***(Articles are in reverse chronological order)*

Osceola News-Gazette (FL)
July 31, 2022

St. Cloud downtown business grants now available

Author: Staff Report

A downtown revitalization project has lanes and streets closed in St. Cloud, affecting some businesses. To compensate, the City announced Monday it's offering marketing grants of up to \$1,000 to help those businesses impacted by the ongoing construction. The downtown revitalization project includes upgrades to underground utilities, brick pavers, new sidewalks, lighting and landscaping.

City Manager **Bill Sturgeon** noted it is scheduled to be substantially completed by October, ahead of the holiday shopping season. "We realize our downtown businesses have been impacted by the construction," **Sturgeon** said. "Although ultimately, the revitalization project will be a boost for downtown businesses, they are telling us that many of their customers aren't coming in right now because of the construction project, and the businesses are hurting. We are hopeful that these dollars will help them create marketing campaigns to encourage those customers to come back. "We also have been working with the businesses to make more convenient parking available," **Sturgeon** said. "This includes City Hall parking lots. We are relocating city vehicles to a lot farther away, and are encouraging employees to work remotely a few days per week to open up more parking spaces at City Hall."

The City has allocated \$50,000 in grant funding for the project, phase 3 of the City's COVID-19 grant program to assist businesses' post-COVID recovery. To qualify, registered businesses must be located in the Entertainment District (properties between 9th and 13th Street and between Florida and Massachusetts Avenues) and have no outstanding debts to the city. Home-based businesses are not eligible for this program.

The marketing grants are funded through the city's COVID-19 Economic Recovery & Stimulus Plan budget, which is funded through the OUC Business Development Fund, city officials said. Grant applications will be accepted until Sept. 15 or until all funds are awarded. Additional information and applications are available online at www.StCloudFL.gov/1084/Grant-Programs. For additional information, call 407-957-7234.

Internet – Newspaper Archives Searches**William (Bill) Sturgeon***(Articles are in reverse chronological order)*

Osceola News-Gazette (FL)

June 21, 2022

St. Cloud City Manager to wrap up 40-year gov't and service career Sept. 2

Author: Ken Jackson

The end of **Bill Sturgeon**'s professional road is coming, he's announced — but he's not taking the next exit. **Sturgeon**, who has served as St. Cloud's city manager for the last four years, service that followed another 35 years in fire/ rescue service, announced Friday that he'd be retiring from the city effective Sept. 2. **Sturgeon**, 58, said he's making the announcement to allow city leaders to begin the process of finding his proper successor, but staying on to complete some projects, and be part of the budget process for the 2022-23 fiscal year in order to deliver the city a balanced budget.

But aside from that ... "After serving in government for more than 40 years, it's time to look at other opportunities," he said. "After serving others in fire service and public safety ... it's a good time to serve my family, and start a new chapter in our lives." **Sturgeon** became the city manager first on an interim basis, then full time, after predecessor Joe Helfenberger resigned the post in July 2017 after just 20 months on the job.

Prior to that, **Sturgeon** succeeded Bill Johnston as St. Cloud Fire Chief in August 2013 after just five months as a St. Cloud assistant chief. He came to the city after serving with Orange County Fire Rescue for nearly 25 years. Shortly into his tenure, the water quality issue reared its head, and he faced all the public outcry when many citizens starting seeing discolored water in 2019. "We had get on top of the communication with the residents, and we kept after it," **Sturgeon** said. "We worked to get the filters re-energized, and it became my goal to get us completely off the MYEX resin system on the way to delivering clean water. I'm confident it's well on the mend."

Sturgeon has also been integral in Toho Water Authority's eventual takeover of the city's water utility this fall. But, he said while projects like that come and go, he will leave behind a professional city staff to continue moving a fast growing city into the future. "You have to have quality people and staff to implement and run them," he said. "The city is in good financial hands, and our bond rating has improved. The city manager relationship with the City Council is the best possible product for our residents."

His staying on through the budget process for the 2022-23 fiscal year to be able to workshop with all city departments and make sure the small details needed are present. Beyond that, he said he'll be, "Working with City Council and staff to ensure a seamless transition." City Council will discuss the selection process or an appointment of a new city manager at a future meeting. **Sturgeon** said it may or may not discuss the matter at tonight's 6:30 p.m. meeting in Council chambers.

Internet – Newspaper Archives Searches**William (Bill) Sturgeon***(Articles are in reverse chronological order)*

Osceola News-Gazette (FL)

March 16, 2022

St. Cloud service chiefs addressing, not battling, growth

Author: Ken Jackson

The city of St. Cloud is growing. This is not news if you live in the area. The news would be how it is managing the growth. The leaders of two of St. Cloud's most important public service units, Fire Chief Jason Miller and Police Chief Doug Goerke, who was just officially sworn in this month, are working toward it, and not in spite of it, and spoke about that at a coffee-and-breakfast gathering in downtown last week brought together by St. Cloud Main Street.

And, to the benefit of the city's residents, their boss "speaks their language." City Manager **Bill Sturgeon** is a former city fire chief himself, and understands their needs and thinks the same way when it comes to responding to emergencies. "Having **Bill** is incredible, for me and the city," Goerke said. "It's amazing to have someone who understands strategic growth." **Sturgeon** said he, Goerke and Miller are alike in their crisis management, strategic thinking and emergency preparedness. "We're a cohesive team, and we're all 'Type A' personalities," the manager said.

Goerke, who took over in February for the retired Pete Gauntlett, said he didn't even take the job until he was sure he was the right fit for a growing city and had the skill set to be a part of that responsible growth. "Services will have to grow with the city," he said. "That growth is in our strategic plan, and the city's, to compensate for that." Both chiefs said service calls were up last year. The police department, which numbers 182 employees and 102 sworn officers, served 95,000 calls in 2021, and Miller said there were 8,612 fire/rescue calls, an 18 percent increase. "We're just busier," Miller said, noting the city has 75 combat personnel among five rescue units and three engines. "I'm excited for the growth. I was born and raised here. Growth is not bad, how it's managed is the key." Despite a mutual-aid agreement with Osceola County, where it will respond to a St. Cloud call if closer, and vice versa, average response time was 7 minutes last year, a minute more than Miller's goal. He chalked it up to traffic and overlapping calls. "'Rush hour' for us is from 7 a.m. to 8 p.m.," he said. "The past couple of years were a struggle, and now the challenge is that the cost of apparatus is up about 20 percent."

To help manage growth, Miller said a temporary fire station will be built in Tohoqua, the new planned neighborhood across Neptune Road from Neptune Middle School, and if a federal SAFER Act grant comes in, it will be used to get a fourth engine. Goerke said he's looking at reducing police response times on the east side, in the Nova Road area, is exploring acquiring body cameras, and hopes to bring back the Citizen's Police Academy. He's also trained as a paramedic and EMT, and said residents will see him on the streets patrolling. "I see myself as just another officer, I don't like to sit behind my desk," he said. "You have an amazing police department that will help people, and I want to be a part of that. I encourage our officers to have interaction with people that isn't, 'License and registration, please.'"

Internet – Newspaper Archives Searches

William (Bill) Sturgeon

(Articles are in reverse chronological order)

Positively Osceola (FL)

January 4, 2022

2022, A New Year, A New Hope – Bill Sturgeon, City Manager City of St. Cloud

Author: Positively Osceola

There's no question, the last two years have been challenging, possibly the most challenging many of us have experienced during our lifetimes. But, a new year is here, and as a community, as a nation, and as a world – we embrace a fresh start with hope for the new year. Positively Osceola asked a number of positive leaders in the community to share their hope and their plans for the new year, and how we can encourage and support each other in 2022.

We asked **Bill Sturgeon**, City Manager with the City of St. Cloud, to share his hope and outlook for 2022. Remember a year ago when we were all so excited to leave 2020 in the rearview, and charge headlong into 2021 leaving COVID-19 behind us? Yet here we are at the dawn of 2022 with a new variant spreading throughout our communities, bringing back masks, wreaking havoc on the nation's airports over the holidays, causing businesses to close temporarily for staffing issues, and spawning lines stretching for blocks at testing sites. It can all look pretty dour and bleak.

I choose to focus on the positive. Life tends to be a series of two steps forward and one step back. Sometimes it seems to be one step forward and two steps back. We tend to romanticize the past and fondly remember “the good ol’ days.” But if we're honest, every year has both good and bad. Acknowledge the bad, but focus on the good. There will always be challenges to face, regardless of what stage of life you're in. We need to practice embracing change instead of resisting it. Understand that change is a part of life, and it's not going away. Just as water that's not moving stagnates, so it is with us as people and also our communities.

The 1998 New York Times bestselling allegory book *Who Moved My Cheese* features four characters looking for cheese (happiness). It's a short story, an easy read, and has a powerful message that is just as applicable today as when it was written. Learning to adapt to a changing environment will greatly improve your mental health and your level of happiness. Rather than pine for the “good ol’ days,” embrace the change around you, see the good that it brings, and look forward to the new opportunities for growth, new experiences, and new knowledge. As the character Haw notes in *Who Moved My Cheese*, “the quicker you let go of old cheese, the sooner you can enjoy new cheese.”

Bill Sturgeon

City Manager, City of St. Cloud Florida

Internet – Newspaper Archives Searches**William (Bill) Sturgeon***(Articles are in reverse chronological order)*

Osceola News-Gazette (FL)

September 14, 2021

St. Cloud goes “inside-out” to eliminate water color issues

Author: Ken Jackson

City of St. Cloud leaders feel confident it is nearing the end of its years-long battle with discolored water. A six-week Ice pigging operation will end Saturday, despite losing a few days to a COVID-19 outbreak. City officials said Friday the number of customer complaints has gone down during that time to just four.

The latest efforts — a sort of “inside-out” approach — speak to a full commitment to “doing whatever it takes” to clear up the problem “once and for all,” City Manager **Bill Sturgeon** said. Divers recently into storage tanks to check them from the inside and found some leftover resin. How did it get there? The city has determined that, during peak usage times, water was going through a bypass pipe directly to the ground storage tanks, so it didn’t go through the polishers that remove the last remaining resin particles. New alarms for when the bypass kicks in and turbidity meters are being implemented so the city will find out immediately and be able to address why.

The ground storage tanks are being cleaned this week. Divers again will go in and “vacuum” the tank surfaces, much like a pool’s surfaces are cleaned. Then the city’s entire water system will be flushed, starting with transmission pipes directly from the plant into the water system, followed by an unidirectional flush of the entire system.

A change from last year is to flush from the plant out through the system, following its natural flow, rather than just in areas that log water complaints. The city will publish a list of pipes being flushed and the timeline. Two rounds of flushing will likely start in early October. “It is not acceptable for this situation to continue,” **Sturgeon** said. “We are committed to every resource available to us. We feel resident’s frustration. The water is safe to drink and use, but we admit it’s had a discoloration issue and we’ve attacked it every way we can. We want to give good, clean water.”

Internet – Newspaper Archives Searches**William (Bill) Sturgeon***(Articles are in reverse chronological order)*

Osceola News-Gazette (FL)

September 3, 2021

St. Cloud continues inspecting Plant No. 4, finds sediment

Author: The City of St. Cloud

A week after a UCF report stated Miex resin was no longer coming out of St. Cloud Water Treatment plant No. 4, an inspection of ground storage tanks found a higher-than-expected level of sediment, the City of St. Cloud reported Thursday. “Some level of sediment is normal, but preliminary information shows more than what we would ordinarily expect,” said City Manager **Bill Sturgeon**. “We have identified an operational anomaly that we believe was contributing to sediment getting into the storage tanks, and we’ve addressed the issue. We also are working on implementing additional measures to mitigate the likelihood of it happening again.”

Sturgeon said the city still awaits a final report on last week’s inspection. “Although we don’t have a final report, we are being proactive in addressing the problem and informing the public based on the preliminary findings,” he said. “This issue has nothing to do with the filtration system at the plant; everything we’ve seen so far shows that it continues operating as it was designed. We are blanketing this problem, looking at our operations, inspecting our tanks, doing every test we need to do and asking every question we need to ask to get in front of this situation. We are going back and double-checking – even triple-checking – everything. We’re looking at every possible angle.” “We are committed to doing what it takes to solve this problem,” **Sturgeon** said.

Customers with discolored water are urged to report it to the city via the St. Cloud Connect app, the city web site, www.stcloud.org (click on Report a Concern) or by phone at 407-957-7344.

Internet – Newspaper Archives Searches**William (Bill) Sturgeon***(Articles are in reverse chronological order)*

Positively Osceola (FL)

July 30, 2021

City of St. Cloud water update: our commitment is to resolve this issue 100%

Author: Positively Osceola

It's not exactly been a secret, the City of St. Cloud and its residents have been dealing with discoloration problems due to the presence of resin in its water since the first customer complaints began surfacing in 2016, and then peaked in 2020 amid the beginning of the COVID-19 pandemic. Initially caused by a failed polisher in its water plant #4 in 2013, the city has been attempting to rid the system of the issue since City Manager **Bill Sturgeon** took over the helm in 2017 using multiple methods, like ice pigging, line swabbing, and flushing its pipes.

Ice Pigging is an effective pipe cleaning technique in which a brine ice slurry is moved through the network to remove unwanted material, sediment, or product residues from the pipe. The Ice Pig is capable of navigating complex pipework which may incorporate changes in pipe diameter, bends, valve systems and other obstructions with no risk of becoming stuck. It is fast, effective and exceptionally low risk (it just melts away), using significantly less water than many other techniques. Yet, some customers, certainly many less than when the problem first arose, are still reporting some discoloration in their water, so the city is continuing to work hard at removing any resin that is eluding them.

According to City Manager **Bill Sturgeon**, the city has ice pigged 27 miles of pipe, swabbed 36 miles, and flushed 105 miles of pipe, and they're not done yet. They are planning line swabbing 8 more miles of pipe, and 30 more miles of ice pigging, all to ensure that the problem is solved, and as **Sturgeon** said to make sure this will never happen again. OUC and Toho Water Authority are assisting the City of St. Cloud in the ice pigging process by opening and closing water valves as needed.

"This has certainly been a long, painful, and frustrating journey and I can't imagine how frustrating it certainly has been for our residents who have been directly impacted by this issue," said St. Cloud Mayor Nathan Blackwell. The mayor pointed out that he and all the city council members live within the city and have also been affected by the water issue and that they too want this issue resolved. "Our goal is to not only remove the resin from the system but to restore our community's faith in their city government and in our ability to provide good, clear, healthy drinking water," Mayor Blackwell shared during the news conference. According to Blackwell, the city council and all the city staff are committed to continuing to follow all the industry standards and recommendations that are brought before them. The city council recently approved the spending of an additional \$500,000 for another round of ice pigging. **Sturgeon** said in the news conference that several weeks ago he made the decision to bring into the process an incident management team with the responsibility to command, control, and coordinate all the resources that the city needs to address the issue.

Internet – Newspaper Archives Searches

William (Bill) Sturgeon

(Articles are in reverse chronological order)

This of course is happening while some customers say they are still seeing some discoloration in their water. According to the Director of Environmental Utilities Marjorie Craig, they are working to remove the last of orange magnetic ionic exchange resin from the pipes that was sent out from failed treatment plant #4. “The resin can be sneaky, and hide in places in the pipes that don’t ordinarily get flushed,” Craig said.

The city is asking its water customers that may still be experiencing problems with their water to call 407.957.7344. “Our commitment is to resolve this issue 100%, by putting all the resources necessary to make sure this problem never happens again,” said City Manager **Bill Sturgeon.**” The city will be holding a press conference every Friday at 2 pm.

CFL Political Voice (FL)

May 6, 2021

Seaplanes, “Centerplaces”, and a City with an Identity Crisis

Author: Tom Lord

The following are my thoughts and my thoughts alone, although some may feel the same. I won't get deep into the non-word “Centerplace” too much, but it does pair into our “City Leader's” vision of changing our town into something else. And I guess it was nice to see an individual with zero history in our town recently try to explain “Centerplace”, and get you to understand it in a publication I'd rather not mention. That, my friends, is called “spin”. When our Council spends that kind of money on something overwhelmingly unpopular, they have to try to justify it and get your “buy in”. Funny that this individual also had a hand in helping our Representative with his ask of funding for the subject at hand.... So Seaplanes.... So with the Seaplane Base, I had heard the rumors and had read about it in the past, but after Governor DeSantis vetoed it last year, I did not expect it to be back so soon. Seaplanes and the proposed “Seaplane Base” has been on “City Leader's” radar for a while now, and now as we get closer to this becoming a reality, I have my thoughts... But before I get to that, let's talk about some history for some context.... There is historical reference to a seaplane base here on East Lake Toho on the St. Cloud Chamber of Commerce's Web site ([www.stcloudflchamber.com/Go To/History.asp](http://www.stcloudflchamber.com/GoTo/History.asp)). The site notes that St. Cloud, which as you know was founded as a retirement village for military veterans, had on Jan. 18, 1940, conducted a ceremony to dedicate an “officially approved seaplane landing base. The site was christened with a bottle of orange juice and 3,000 were in attendance.”

Around the year 1917, Florida became a training ground for Navy seaplanes. A base in Pensacola was the Navy's only air station when the United States declared war on Germany on April 6, 1917. It soon opened the Navy's primary seaplane training station in Key West, followed by similar seaplane training bases in Pensacola, Miami, and along the Banana River. Kissimmee and Orlando's airports can trace their beginnings to the Army Air Corps training bases opened during the early stages of World War II. The Navy also opened a base in Sanford. Back then, German U-boats that were spotted off the Atlantic coastline forced the United States to step up patrols and provide escorts for oil and other cargo ships. The military soon had twin-engine patrol-bomber seaplanes, some converted from pre-war commercial airline fleets, stationed in Florida. That may have been the inspiration and reason for St. Cloud to take on the cost of building a seaplane base on East Lake Toho back then. The sad fact is no military seaplanes had ever landed in St. Cloud during that era. Fast forward to 2 years ago. Former HD 42 Representative Mike LaRosa filed an appropriations project, HB 3857 on 11/19/19. The ask was for \$375k for a St. Cloud Seaplane Base. And an article was published in the Orlando Sentinel in December of that year that talked about this. In the article, it talks about the seaplane base being a part of the City's plan to bring the shoreline to life and attract tourism. It also talks about the plans for Florida Avenue to connect the waterfront to downtown with trails for bikers and walkers (recently passed by the Council), and potentially future talks about launching bike-sharing, connecting the Lakefront to the downtown area.

Internet – Newspaper Archives Searches**William (Bill) Sturgeon***(Articles are in reverse chronological order)*

St. Cloud City Manager **Bill Sturgeon** is quoted as saying, “We want people to come here and enjoy our Lakefront. We want to open it up and have people from all over the state come and have some events also.” Our City Manager, **Bill Sturgeon**, was formerly the Assistant Fire Chief of Tavares, which bills itself as “America’s Seaplane City” “We’re not trying to take business from them,” he said. “I’ve been down there at lunch and it’s really cool to see people come in from all over the state and have lunch and fly back to their home base, and we want the same thing.” Governor DeSantis vetoed Mr. LaRosa’s bill on 6/29/20. So this year, Mr. LaRosa’s replacement, Representative Fred Hawkins, submitted HB 3911 for the same seaplane base, but this time asking for \$500k. It has made its way through committees and unless vetoed by the Governor, this will become a reality. No worries though, **Mr. Sturgeon**. I don’t think Tavares has anything to worry about in regards to us “taking any business from them.” St. Cloud is not a tourist destination. Now some will say “neither is Tavares”. Well, Tavares whole image is “Seaplanes”. A Seaplane is in their logo and like stated prior, they are billed as “America’s Seaplane City” Tavares is a Lakefront City, situated on Lake Dora. It’s entire economy is tied to seaplanes and it’s entertainment and downtown district is situated on its lakefront, whereas our Lakefront is surrounded by residential. Restaurants, boat rides, train rides, shops, music venues, pubs, and a seaplane themed water park are all on or around their Lakefront.

Seaplanes have been very good for Tavares so I can see why City Leadership might think this is the way to go to attract tourism dollars, especially with **Mr. Sturgeon’s** history with Tavares. Also, the cities of Winter Haven and Miami have public seaplane bases, and those along with Tavares’ bring an economic impact of about \$52 million, according to a Florida Department of Transportation study. Tavares’ facility, however, accounts for \$39 million of that figure. Like I said, Tavares’ economy is tied to Seaplanes. The Winter Haven base is basically a training facility and a stopover for fueling. Nearby is Fantasy of Flight. You’ve probably seen the signs for it going down I-4 to Tampa. The Miami seaplane base is located between Miami and Miami Beach and runs charters to the Keys and the Bahamas.

I get why those seaplane bases generate revenue. And especially why Tavares takes the majority. Tavares built their image around Seaplanes and built up their Lakefront to accommodate. St. Cloud has a very underutilized Lakefront, there is no doubt about it. But my thoughts are if this is the image that St. Cloud leadership wants, to take on Tavares’ identity, we need a solid reason for tourists to come. Right now, I don’t see it. In Tavares, their downtown area is on Lake Dora. The city borrowed about \$8 million 10+ years ago to build new facilities at the city marina. 60 slips for planes, two fuel stations (one on land and a floating station in the lake), an airport terminal building, and a pavilion for weddings and corporate retreats.

The City Manager of Tavares is John Drury, and he is credited with the revival of Tavares, whose economy was in decline before he came on board. If you know his story, his background, and the layout of Tavares, then you understand why this works there. “We took a very civic and entrepreneurial approach,” Drury is quoted saying. “We knew if we provided jobs, parks, and entertainment the rest would come.” Our Lakefront has Crabby Bill’s. And a beach area and picnic areas. The other side of Lakeshore Drive is residential homes. That’s it. And a 10 block walk to the downtown area through residential neighborhoods. Once downtown, we have a few

Internet – Newspaper Archives Searches**William (Bill) Sturgeon***(Articles are in reverse chronological order)*

great restaurants, but no “tourist attraction”. Even if the plan was to have bicycle or some type of scooter transportation going up and down Florida Avenue, it’s a mile up Florida Avenue to the downtown area, and for what? Lunch? That’s quite a ways to go through residential areas... whereas if you look at a map of Tavares, you have less than a block, perfect walking distance. Also, it would have been nice to disclose this plan for possible transportation up and down Florida Avenue to the residents when they did their “Florida Avenue Multi-use Trail” presentation. They’ve had multiple opportunities. They did present this as something for the residents, did they not? A beautiful Lakefront and our downtown area 10 blocks away through residential neighborhoods is not enough to attract regular tourism revenues. Downtown is great when we have events happening and could be a draw, but how often is that happening? And I think the bigger issue is this is being done, not for the residents, but for tourism dollars.

At last count, the City of St. Cloud has 55,000+ residents and continues to grow. When is the City going to do things for the residents? For our children? We have plenty of money here in St. Cloud, but the residents have more reason to spend it outside of St. Cloud. I always think about what my friend, Chris Ladas-Drake says...67 cents of every dollar spent in St. Cloud stays in St. Cloud. Maybe if there was more thought to attracting things to the area to get the residents to stay here and spend their money here, we would not need to think about trying to attract tourism dollars to prop up St. Cloud’s economy.

It has to start with keeping your residents in mind and think about how to get them to spend their money here. Invest money into the Lakefront for the residents. Fishing charters, boat tours, water activities, vendors, boat races, etc. You’d need these to build up the Lakefront if this is the direction that the City wants to go anyway with these seaplanes. Until they do that, St. Cloud might be great for a quick stop over for refueling, but I don’t see much more than that until you give the residents, let alone tourists, a reason to stay for a while. And has anyone asked the residents that live on Lakeshore if they want this? Lakeshore Drive residents, have you seen what this looks like? The plan (at least originally) is to build this on Lakeshore Drive near the marina.

Take a look at Tavares... Tavares is set up much different than St. Cloud. This will not work in the same way. St. Cloud would be better off fixing what’s wrong and making it easier for our citizens to enjoy themselves in St. Cloud and spend their money in St. Cloud. Understand, I am not totally opposed to this idea. I think it would be “cool” to see the planes. I just see this as another case of “putting the cart before the horse”. Until the City has attractions geared towards fun and entertainment for it’s residents, you really can’t expect to generate regular tourism revenues. That’s just reality. And these friends, are just my thoughts...

Internet – Newspaper Archives Searches**William (Bill) Sturgeon***(Articles are in reverse chronological order)*

CFL Political Voice (FL)

April 12, 2021

St. Cloud City Council Meeting Recap for 4/8/21

Author: Tom Lord

Meeting begins with pledge of allegiance and roll call. All council members are present for this meeting. There are no presentations at this meeting so we head straight into the Citizen's Forum. The first citizen to address the council is James Moore. Mr. Moore is addressing the council because he has been cited by code enforcement for his fence, which had been approved by the city 3 years earlier.

City Manager **Bill Sturgeon** assured Mr. Moore that the situation would be taken care of. At that time, City Council Member Chuck Cooper questioned both the City Attorney Dan Mantzaris and Mr. **Sturgeon** about how they could approve the fence at the time of it being built and then come back at a later date and fine the resident. Mr. Mantzaris explained that the fence had changed and exceeded what is permissible. Mr. Moore told the Council that when the builder for the change in the fence submitted the paperwork, it was signed off by the City. **Mr. Sturgeon** once again assured Mr. Moore the situation would be resolved.

The next resident to address the council was Dolly Clements. Miss Clements wanted to ask the council about a historic tax exemption for a historic building that she purchased in the 2006. The historic tax exemption waves 100% of her ad valorem taxes on her building. She wanted to know after the last few years of submitting paperwork if she's going to be approved or not. City Attorney Dan Mantzaris told the Council that this ordinance was never enacted by the City. Miss Clements argued that it says it very clearly on the website. Council Member Chuck Cooper then asked if somebody could take a look at that. Mr. Mantzaris then said that he could get all that information for him. **Mr. Sturgeon** assured Miss Clements that he will get an answer for her.

Next to the podium was Donnie Martinez, who is the President of the Osceola County Association of Realtors. He is at the meeting tonight to thank the Council for a proclamation tonight in recognition of Fair Housing month. For the Consent Agenda, Council Member Chuck Cooper asked that Items C and D be pulled for a separate vote. (Approval of the final plat of Old Hickory (C) and approval of final plat for Tohoqua phase 4A (D)) Council Member Linette Matheny ask to pull Item C for discussion. Ms. Matheny had a question about one of the plat notes about the storm water tract. Mayor Blackwell asked for a motion on Item C and Deputy Mayor Trace made a motion to approve. The vote came down 4- 1, with Mr. Cooper voting "no". The same thing happened with item D, the vote was 4- 1, with Mr. Cooper once again voting "no".

The rest of the Consent Agenda (a resolution authorizing certain City Personnel the right to sign banking documents with SunTrust Bank, a resolution amending the official staffing table, and approval of the minutes from the January 28 meeting) were approved by the council 5-0. For Public Hearings, the only item to be heard was Resolution no. 2021-063R, a resolution granting a

Internet – Newspaper Archives Searches**William (Bill) Sturgeon***(Articles are in reverse chronological order)*

conditional use to operate gasoline sales in conjunction with a convenience store inside the Anthem Park subdivision on Lexington Blvd. The developer came before the council to say that they agree with Staff's Recommendation to approve this item, despite the Planning Committee denying this item 5- 0. Council Member Dave Askew pointed out that this road is a road that is used to stack cars for Neptune Elementary School. He then asked the developer if he has ever seen that twice a day, at which time the developer said he has not and Mr. Askew told him he really should.

At least 8 City residents came before the council to speak against this gas station, including the owners of a school which would be across the street from it. After the citizens were done airing their grievances, Council Member Chuck Cooper made a motion to deny the resolution and was seconded by Council Member Matheny. Mayor Blackwell told the council that he wanted to have discussion first before they vote. Mr. Mantzaris then reviewed the six essential factors and to decide which ones are not met by this item in case the denial is challenged. In the end, the Council voted to deny this resolution, at which time the audience cheered.

For the Council Action portion of the meeting, the council need to fill a vacancy on the Planning Commission and the Historic Preservation Committee. The council first dealt with the vacancy on the Planning Commission alternate 2, with Council Member Matheny requesting to reappoint Jeffrey Rivera, with Deputy Mayor Trace seconding the motion. Mr. Rivera was successfully appointed by the Council 5-0.

Next was the Historic Preservation committee appointment for seat #2. Council Member Chuck Cooper made a motion to appoint Thomas Lord, and Council Member Matheny made a motion to appoint Mikayla Goetz. Deputy Mayor Trace suggested moving one of the alternate members into a permanent spot. The council then decided to move the alternate into seat 2 and instead appoint someone else to the alternate seat. The Mayor then asked if he could get a second on the motion to appoint Thomas Lord. Silence. At this point someone giggled, and The mayor then stated the motion failed for lack of a second.

The mayor decided to second Council Member Matheny's motion to appoint Mikayla Goetz. She was successfully appointed 4-1, with Chuck Cooper voting "no". The meeting finished with Council Member comments. The next City Council Meeting will be on Thursday, April 22nd at 6:30pm at City Hall in Council Chambers.

Internet – Newspaper Archives Searches**William (Bill) Sturgeon***(Articles are in reverse chronological order)*

Osceola News-Gazette (FL)

October 20, 2020

Sturgeon: ‘We’re on it’ – St. Cloud launches new website showing city’s actions on water issues

Author: Brian McBride

St. Cloud city officials have launched a new website to hopefully clear the air about its water situation. The St. Cloud Water Matters website (<https://ourcommunitywater.com>) went live Oct. 6 and includes a number of different educational information including: what exactly happened; a timeline of events; steps the city has taken so far to rectify the problems; a question and answer page and more. “We are accountable and we want to be held accountable,” City Manager **Bill Sturgeon** said.

The problem started in 2017, when residents started getting discolored water out of their taps. But **Sturgeon** said city crews have been tirelessly working to rectify the problem and it just wasn’t an overnight fix. “We just want to show we’re not sitting on our hands, we never have,” he said. He said unfortunately there has been misinformation circulating on social media platforms from people who are accusing the city of not addressing the situation. “They have no facts, it’s all emotion and it’s disheartening to my staff. They’re demoralized,” **Sturgeon** said.

That also includes members of the St. Cloud City Council, **Sturgeon** said. Any problem the city experiences falls on his shoulders. “The mayor is not the chief executive of the city, the city manager is,” **Sturgeon** said. “As chief executive, that’s my responsibility and I’m willing to take the hits because I’m responsible, but those people (council members) are unfairly getting attacked.”

The fault that city officials do bear is not getting the information out better, said St. Cloud Environmental Utilities Department Director Marjorie Craig. “We are not good at telling people what we are doing when we are out there (working),” she said. “We are working on fixing the issue, and we were focused on that, and don’t necessarily communicate enough to the public on what we are doing to fix the problem.”

When the city first started getting complaints, an investigation determined that the polishing filters, the last step that makes water clear, failed and that the resin used in the treatment process was changed by the manufacturer without notification to the city. The result was discolored water, according to the new website.

Because the resin compound was not a contaminant, ongoing water quality testing didn’t flag that anything was wrong. The city ordered design and installation of new filters, fittings and valves to repair the polishing system. Because of the complexity, this took a year. The old polishing filters were aluminum and fractured, which led to the problem. The new polishers are stainless steel. Beyond replacing the polishing system, the city began a systemic process of cleaning water pipes with various technologies. Using flushing, ice pigging, and line swabbing

Internet – Newspaper Archives Searches**William (Bill) Sturgeon***(Articles are in reverse chronological order)*

together and separately, the city has cleaned 171 miles of pipes. Some pipes have been cleaned five times.

Here are the cleaning methods city crews have been using:

Flushing: Flushing scours a water pipe by releasing water under high pressure through fire hydrants in order to remove anything adhering to the inside of the pipe. Unidirectional flushing is a systematic flushing of hydrants in a certain order for more efficient cleaning. It is now a part of the city's ongoing maintenance.

Ice pigging: Ice pigging is when the city sends a thick ice slurry through the pipes to scour anything that may be adhering to the pipe walls. This technique is good for short lengths of pipe and customers are out of service for one to two hours, but a boil water notice is not required.

Line swabbing: Line swabbing scours the pipe using a semi-rigid foam plug or "swab." This cleaning technique is used for longer runs of pipe. The pipe is offline while we are performing the work. While the pipe may be offline for four to six hours, this technique requires a 48-hour boil water notice and our customers are unable to use tap water for drinking and cooking purposes.

The city was divided into zones, each to be flushed in turn. It is focusing on the zones that have experienced water discoloration, but when the entire city has been completed, it will start again. Craig said the city has now been doing a better job communicating when crews are working. The city has been putting signs out, notifying people through letters, putting out door hangers, reverse 911 calls and even handing out bottled water. "We've learned," Craig said. "We've been listening."

In some areas, there are occasional reports of discolored water. But it is not as frequent or as intense, according to the website. From the very first water colored complaint, the city has met and continues to meet all federal and state drinking water standards, St. Cloud officials said. Craig said she couldn't give an exact timeline until all the resin has been cleared, but it could be another six months. "We're on it," **Sturgeon** said. "We've addressed it and we are going to continue to address it until we don't get one more call about it. I want the public to know that we're on it."

Internet – Newspaper Archives Searches

William (Bill) Sturgeon

(Articles are in reverse chronological order)

Osceola News-Gazette (FL)

August 25, 2020

‘St. Cloud Connect’ app simplifies contacting city hall

Author: News Staff

Reporting an issue, paying a St. Cloud utilities bill and looking for city job openings are all just a click away with the new St. Cloud Connect app, launched this month by the city of St. Cloud. “The St. Cloud Connect app puts the power to easily interact with the city in the palm of your hand, using any Apple or Android smart phone,” said City Manager **William Sturgeon**. “Our goal is to make it easy for our residents to find the information they need, or to communicate with us, at a time and in a way that’s convenient for them.”

On the St. Cloud Connect app, residents can interact with city hall in a variety of ways, including paying their utilities bills, finding out what day their solid waste collection is scheduled, reporting a pothole, requesting a repair for a broken solid waste cart, viewing job openings, reporting non-violent crimes and many other common requests. Additionally, agendas for upcoming meetings are available, along with a calendar of City meetings.

“St. Cloud Connect is another vehicle our residents can use to interact with us,” **Sturgeon** said. “It is convenient to have access to all that on your mobile device, anytime of the day or night.”

The free St. Cloud Connect app is available or download to Apple or Android smart devices, at the App Store and Google Play. Users already registered on the city’s web site will need to create a new username and password for the app.

Internet – Newspaper Archives Searches**William (Bill) Sturgeon***(Articles are in reverse chronological order)*

Positively Osceola (FL)

April 21, 2020

City of St. Cloud – flexible, responsive, remote and strong

Author: Positively Osceola

If COVID-19 is an adversary, the City of St. Cloud is staring it down. It's a city that's being flexible *and* responsive to its citizens. If it feels like it's been "a while" since things changed, it's because the City Council and City Manager **Bill Sturgeon** acted and directed staff to be nimble early on, taking action on March 19. "When this whole thing started to evolve, right away I put the senior management team together and said, let's make health of our community, elected officials and employees the top priority," he said.

City Council member Linette Matheny said St. Cloud was first to shut down its City Hall to the public in the area. "That says a lot for our management to make those tough decisions and protect your employees," she said. "So many in the building were not prepared to be totally remote, but our IT group did a great job ensuring keeping the city moving and maintaining services. There will be bumps in the road, but the unique ways to solve problems we've learned will stay with us after all this is finally over." Emergency services are fully functioning like fire, police and EMS protection, solid waste and public works. "My hat's off to the City Manager, the Police Chief (Pete Gauntlett), the Fire Chief (Joe Silvestris), and Mayor (Nathan Blackwell, who sits on the county's Executive Policy Group)."

The city's major water quality project continues with the ice pigging and swabbing operations to flush water pipes. And while the building department has gone to online permits via email, city staff can and will meet with those who need to after a health screening. "Inspections still go on to keep construction projects going. Those essential services so important to keep from causing community issues," **Sturgeon** said. "The staff has stepped up beyond imagination who have come up with things I would have never thought of in my life. It's been a great team effort, from City Council to the newest employee."

There's a theme around St. Cloud – the "Heroes Work Here" – that started at St. Cloud Regional Medical Center to recognize health care workers, and it's worked its way down to front-line city employees, waste management, water plant and utilities staff and fleet services. "We decided to recognize and make sure we take care of all of them," **Sturgeon** said. "And I have to also thank our grocery stores and pharmacy workers, who we've taken for granted all this time. Hats off for standing in and staying the course."

And the city has made sure the city can stay the course, approving \$15,000 from accounts with extra money from the last fiscal year to support the [St. Cloud Community Pantry](#). "Their need is going to continue for a while," Matheny said. Keeping city business going, Thursday marks the second remote City Council meeting. Go to stcloud.org to check it out at 6:30. "Gone smoothly. Can't say enough good things about our IT department."

Internet – Newspaper Archives Searches
William (Bill) Sturgeon*(Articles are in reverse chronological order)*

The Orlando Sentinel (FL)
February 18, 2020

Pipe cleaning may finally clear up dark water in St. Cloud's faucets

Author: Ryan Gillespie

The water pouring out of Renee Bronson's faucets several days this month has smelled of mold and had a hue resembling dirty motor oil. It's far darker - and a different problem - than the rust-colored water that has gushed in homes throughout St. Cloud for more than four years. But it's the latest chapter in the frustrating saga that has rankled dozens of her neighbors and confounded city officials, who all say they're eager for clean water.

Bronson, a mental health counselor, stayed home from work two days, steadily running water and flushing toilets to clear the lines. She's also spent about \$2,000 to fix her ice maker, washing machine and water-filtration system, which were damaged by the water. She's been assured by the city that the water is safe - the product of a chemical reaction of some kind - but the odor is difficult to rid from her clothes and sheets. "I just couldn't get my brain around it," she said. "This has been a continuous nightmare. I feel like I'm in a Stephen King novel."

City Manager **Bill Sturgeon** said the city has been working since 2016 to fix the problem and thinks they're nearing a solution. The city purchased and installed a \$1.6 million stainless-steel polisher for the troubled water plant, designed to remove resin particles from the water. The reddish, orangish tint is caused by the resin that had escaped a polisher that had stopped working. Also, the city has contracted with a California company to drive ice-slushy-like material through pipes to clean the city's pipes from sediment and debris. The deal is worth \$500,000.

Called ice-pigging, the method developed in Europe is thought to be highly effective at cleaning pipes. **Sturgeon** said the city has booked the only two such trucks in the country, which will be cleaning 20 miles of the city's pipes over the next six weeks. The city has also discussed purchasing an ice-pigging truck of its own for about \$1.5 million if it works. "I'm confident that it will be well on the mend, [though] we may find some other areas that may have it done," **Sturgeon** said. "The people have a legitimate concern. It's orange."

After urging from residents who have seen white clothes fade to orange, and who have replaced or repaired appliances over several years, the city held a meeting this week. **Sturgeon** explained the city's efforts, that they've been trying to fix the problem and that they may be close. "There's an allegation that we've been sitting around doing nothing and that's not the case," he said of the effort that has cost about \$3 million.

But distrust remains for some residents. Brandi James, a property manager who has started a Facebook page and a website, saintcloudwater.com, said her water remains brown, and she suspects with the city not ice-pigging the main line that runs from the plant to the neighborhoods, the problem will persist. "To me, it's asinine," James said. She receives about a half-dozen new photos and videos of tinted water each week to the Facebook page, and each week, new members

Internet – Newspaper Archives Searches**William (Bill) Sturgeon***(Articles are in reverse chronological order)*

join after the water flowed to them. She even goes to her sister's home to bathe her 1-year-old to avoid exposing him to it. "I use bottled water for everything ... Nothing in my house clothing-wise is white anymore. My bathtub is disgusting," said James, who pays the St. Cloud utility about \$90 per month, which also includes sewage and garbage service.

Sturgeon and the city maintain the water is safe. In the meeting this week, he took a swig of the cloudy water. U.S. Rep. Darren Soto, D-Kissimmee, said his office would be contacting the Environmental Protection Agency for financial assistance. About a year ago, U.S. Water made changes at St. Cloud's water plants designed to limit the amount of the material that escaped polishers. Paired with a new polisher coming online, which **Sturgeon** maintained was "overengineered" to prevent future flare-ups, and the ice-pigging, clean water could be around the corner. But not fast enough for many in the city of more than 50,000. "It's a hindrance on everything," James said.

The Orlando Sentinel (FL)

December 19, 2019

Eyeing more visitors – St. Cloud hopes to open seaplane base in coming months

Author: Ryan Gillespie

Day trips to St. Cloud soon could become more feasible by air, as city officials believe they're on the verge of constructing the region's third public-use seaplane base. It would be located on East Lake Tohopekaliga, about 50 miles north of Tavares' seaplane base, which opened in 2010. On a recent day, boats were docked on choppy waters at the proposed site near the marina on Lakeview Drive. Along the shoreline, joggers enjoyed a trail and a lakefront restaurant readied to open for lunch.

As part of its plan to bring the shoreline to life, officials are planning for Florida Avenue to connect the waterfront to downtown with trails for bikers and walkers, and potentially future discussions about launching bike-sharing, further connecting it to its downtown. "We want people to come here and enjoy our lakefront," City Manager **Bill Sturgeon** said. "We want to open [it] up and have people from all over the state come and have some events also."

St. Cloud already has federal permission to open a base for seaplanes, which legally can land on most public waterways. According to the Seaplane Pilots Association, Florida has the most pilots of any state, though Winter Park and Maitland have ordinances barring pilots from their waterways. Now the city is seeking state approval, which includes a public comment period that ends Friday. If permission is granted, St. Cloud is hopeful to have a seaplane lane open on the lake by February, and constructing a more permanent base in the months to follow, project manager Kevin Felblinger said.

To expedite the process, the city is seeking state money through a local appropriations bill proposed by state Rep. Mike La Rosa, R-St. Cloud. If the city receives the entire \$375,000 requested, **Sturgeon** said that would cover much of the expense but additional city funds may be necessary. The state money would cover fuel pumps, tie-downs, floating docks and ramps, records show.

Greg O'Neil, a nearby resident, has been piloting seaplanes for about 40 years, and has been supportive of the city's efforts and likes its potential. "It's just so many opportunities around Central Florida with lakes," O'Neil said. "East Lake Toho should work well as long as they have a protective harbor."

Winter Haven and Miami also have public seaport bases, and those along with Tavares' bring an economic impact of about \$52 million, according to a Florida Department of Transportation study. Tavares' facility accounts for \$39 million of that figure. However, Tavares' seaplane base and marina were destroyed by Hurricane Irma in 2017. The City Council recently approved a maximum price tag of \$8.2 million, with 98% of that being covered by insurance, to rebuild the facilities. Having seaplane bases in Tavares and St. Cloud, and a successful flight school in

Internet – Newspaper Archives Searches

William (Bill) Sturgeon

(Articles are in reverse chronological order)

Winter Haven, could create natural stopping points for meals and refueling as pilots travel the state, **Sturgeon** said. **Sturgeon** is a former assistant fire chief in Tavares, which calls itself America's Seaplane City. "We're not trying to take business from them," he said. "I've been down there at lunch and it's really cool to see people come in from all over the state and have lunch and fly back to their home base, and we want the same thing."

Internet – Newspaper Archives Searches

William (Bill) Sturgeon

(Articles are in reverse chronological order)

Positively Osceola (FL)

September 6, 2019

City of St. Cloud leaders graduate from certified public manager program

Author: Positively Osceola

Last week, six St. Cloud city leaders were honored at the Florida Certified Public Manager (CPM) Program graduation.

The group which included Veronica Miller (Deputy City Manager), Linda Jaworski (City Clerk), Kevin Felblinger (Deputy Public Services Director), Andre Anderson (Planning and Zoning Director), Joe Silvestris (Fire Chief) and Jason Miller (Deputy Fire Chief), successfully completed the rigorous two-year CPM program. St. Cloud City Manager **Bill Sturgeon** was invited to be the keynote speaker at the graduation ceremony.

“It is an honor to not only be involved with the CPM Program, but to see so many St. Cloud city leaders take on the task of improving their leadership skills. I am proud to work with these men and women who come into work every day striving to make St. Cloud a better community,” said St. Cloud City Manager **Bill Sturgeon**.

CPM is a nationally-recognized program for training and developing public managers and supervisors.

Internet – Newspaper Archives Searches**William (Bill) Sturgeon***(Articles are in reverse chronological order)*

Orlando Sentinel, The (FL)

May 13, 2018

Inquest: Official's act inappropriate - St. Cloud councilman draws fire for goosing female staffer

Author/Byline: Bianca Padró Ocasio

A St. Cloud council member behaved inappropriately when he patted a female staff member's butt, an independent review found, prompting some residents to call for his resignation. "We don't need somebody in City Hall like him," St. Cloud resident Jill Fangmann said of Councilman Chuck Cooper. "Council people shouldn't be above from what would be normal in any other workplace."

The turmoil began after a city employee said that, at the conclusion of a City Council meeting last year, Cooper had "hit her on the buttocks similar to a Coach hitting a player," according to the investigation. At that Jan. 17, 2017, meeting, Cooper, 69, was heard saying that he "goosed" the employee - or poked her between the buttocks - as his hand quickly sprung forward, according to the report, which was released April 4. Cooper did not respond to a request for comment.

The employee, a 55-year-old woman who has known Cooper since she was a child, said she had felt uncomfortable with the incident and finds his hugs uncomfortable, but that she "did not wish to pursue a complaint against him," the report said. But the woman also said human resources director Harvey Bisson told her it would be "career suicide" to pursue a complaint against Cooper. The employee said she was offended by Bisson's comments and complained to a superior, which spurred the investigation against Cooper. That has prompted the city to order a separate review of its procedures handling sexual harassment.

The investigation into Cooper's actions was conducted by attorney Lindsay Oyewale, a partner at Orlando-based DSK Law. Oyewale concluded Cooper's touching of an employee, even if it wasn't meant to be sexual in nature, was "inappropriate." But the city council said there was no legal action it could take against him. The report stressed that the employee did not think the "alleged touching affected the terms and conditions of employment" and she understood the "alleged touching was in jest," so the behavior was not "sufficiently severe and pervasive" to constitute sexual harassment.

During the public comment portion of an April 26 city council meeting, St. Cloud resident Teresa Kramer said she was also in disbelief about the findings against Cooper, which were first reported by the Osceola News-Gazette. "It's sexual harassment, this is power and control that's being exercised against a female employee and it should not stand," she said. Cooper told Kramer she didn't have the full story and was not "listening to the other side."

St. Cloud Mayor Nathan Blackwell said during the meeting that the investigation had been handled legally. "We're not going to have a debate here, OK? You've made your statement, we

Internet – Newspaper Archives Searches**William (Bill) Sturgeon***(Articles are in reverse chronological order)*

understand that and we've responded appropriately," he said. But Bisson and the human resources department are now the subject of a review in their handling of the complaint.

Human resources "must do everything possible to prevent even the perception that they are trying to talk an employee out of filing a complaint," St. Cloud City Manager **William Sturgeon** said in a letter to Bisson on April 16. "It is my directive that all claims of harassment filed either verbally or in writing will be fully investigated by the Human Resources Department or their designee," the letter read.

Bisson said he just wanted the woman to know he had previously pursued a complaint against a council member and it hadn't ended well. He said he felt pushing her to make a complaint after she had already refused "would be viewed as inappropriately attempting to influence the employee to take actions they are not inclined to pursue." Krystal Diaz, a spokeswoman for St. Cloud, said Bisson has not been disciplined. She added that the city has drafted new procedures that are being reviewed by a third-party attorney, which will then be presented to the council for adoption.

The employee did not respond to a request for comment but said in a letter to **Sturgeon** on April 17 that "at the very least there should be some education on the way that Human Resources interacts with employees" who complain. Kramer said the investigation didn't go far enough. "I'm disappointed that the city council seems like they're turning backs on this," she said. "If we let them stay and we don't do anything ... then we're basically condoning this behavior."

**Internet – Newspaper Archives Searches
William (Bill) Sturgeon**

(Articles are in reverse chronological order)

WFTV 9 (FL)
February 2, 2018

St. Cloud city manager faces ethics complaint for using police car

Author: Field Sutton

The St. Cloud city manager is facing an ethics complaint after driving a police car as his primary vehicle for more than a week. The city said he did nothing wrong, but some residents call it a lapse of judgment. No policy exists regarding the use of a police vehicle as a primary vehicle.

More than a month ago, a vote at St. Cloud City Hall approved buying more than \$200,000 worth of Ford Explorers for the St. Cloud Police Department. And while dealer tags were still on one of them, the city manager spent 10 days driving one of those Ford Explorers around town, including back and forth to his house. "I utilized a city vehicle for 10 days. And I just wanted to make the council aware of that," said City Manager **Bill Sturgeon**.

According to records, he paid the city back a total \$160 for using the vehicle, although it was from his taxpayer-funded monthly car allowance. That comes out to \$16 a day for an SUV that would cost much more as a typical rental. An ethics complaint about the incident claims it's an abuse of tax dollars, but the city released the following statement: "It's no secret that this is an act of retaliation, raised by a former contract employee who was recently terminated by the City Manager for ethics violations for practicing real estate without a license as confirmed by the state's investigation."

The Florida Department of Business and Professional Regulation had conducted an investigation into the author of that ethics complaint. Around town, people told Channel 9's Field Sutton they thought filing something official was overkill. "We need to look at the more important, bigger issues here. We have a fundamentally honest fellow who made a bad decision and corrected it," said Huggette Crumpler, who lives in St. Cloud.

Internet – Newspaper Archives Searches**William (Bill) Sturgeon***(Articles are in reverse chronological order)*

Positively Osceola (FL)

November 1, 2017

St. Cloud City Council Votes Unanimously to Approve Bill Sturgeon as City Manager

Author: Positively Osceola

In a unanimous vote Thursday, the St. Cloud City Council named **William E. “Bill” Sturgeon** as City Manager. **Sturgeon** had been serving in an interim capacity since July, 2017, moving from his role as the City’s Fire Chief. “I am extremely pleased the City Council has unanimously approved **Mr. William Sturgeon** to serve as our new City Manager,” said St. Cloud Mayor Nathan Blackwell. “**Mr. Sturgeon** is a proven leader who has effectively led the St. Cloud Fire and Rescue Department for the past four plus years. He has also served as our Assistant City Manager and most recently as the interim City Manager. He is well known and highly respected by all our current City Staff. **Mr. Sturgeon**’s long-term knowledge of our city, his positive people skills and his leadership expertise are what we need to move the City of St. Cloud forward into a positive future.”

Mayor Blackwell asks the community to join in welcoming **Mr. Sturgeon** to his new position. “I’m grateful for this opportunity. St. Cloud has such a rich history and an equally dynamic future and I’m eager to contribute to the City’s growth and success,” **Sturgeon** said. “There is much to be done; there are exciting times ahead.” **Mr. Sturgeon** had been serving as Chief of St. Cloud Fire and Rescue, when named Interim City Manager. He came to St. Cloud in March 2013 from Orlando Utilities Commission, where he served as a Senior Safety Coordinator for Water Distribution, Water Production, and Chilled Water business units. Previously, he was with Orange County Fire Rescue for 24 years. **Mr. Sturgeon**, a U.S. Air Force veteran, earned an associate degree in Fire Science, a bachelor’s degree in Occupational Safety and Health, and a master’s degree in Public Administration. He is a Certified Public Manager and a member in good standing with the International City/County Management Association.

He has also served on many boards in Central Florida, including the Board of Trustees for St. Cloud Regional Medical Center, Central Florida Fire Chiefs’ Association, and Central Florida Fire Consortium, where he served as President from 2014 to 2016. Serving a population of 47,809 residents, the City consists of 500 full-time, part-time, and seasonal employees; an annual operating and capital budget of more than \$142 million. **Mr. Sturgeon** and his wife, Linda, have four children and two grandchildren. He is an avid golfer and enjoys reading and spending time with his family. Bay News 9 (FL)

July 27, 2017

St. Cloud Running Out of Space Amid Rapid Growth, Says City Manager

Author: News 13 Florida

St. Cloud is growing at a very rapid rate, and with that comes the need for more space. City Manager **Bill Sturgeon** said St. Cloud is one of the fastest growing cities in Central Florida. In fact, the police, fire, and building department are all running out of space. The city was

Internet – Newspaper Archives Searches

William (Bill) Sturgeon

(Articles are in reverse chronological order)

contemplating buying an old Irish pub on 918 New York Avenue, close to city hall, for more than \$1 million and transforming it into a new building department.

The idea generated negative comments by some on social media, but the city has since backed away from the idea. They are now looking into creating a study to try and figure out where and what needs to be expanded. “We want a master plan for the city hall campus, and that will take about a year to do. And then we will know where we need to do buildings and upgrades,”

Sturgeon said. “Because we don’t want to just start putting buildings on our property here without any planning.”

Kenneth Whittle, born and raised in St. Cloud, said he’s always looked forward to the rapid growth and hopes the city can keep up in a smart way. “Unfortunately we’re running out of space because of our growth, and I feel we need to start looking at these other opportunities,” Whittle said.

The St. Cloud Community Redevelopment Agency recently made an offer to buy the old Irish pub for \$350,000 to renovate and later lease out. Due to the growth, the CRA wants to attract more businesses to the downtown area. However, the CRA is waiting to hear back from the seller.

Internet – Newspaper Archives Searches**William (Bill) Sturgeon***(Articles are in reverse chronological order)*

Orlando Sentinel, The (FL)
October 28, 2017

Monuments co-exist in peace - A history lesson in St. Cloud

Author/Byline: Ryan Gillespie

America's fierce debate about Confederate memorials on public property hasn't reached St. Cloud, a city first founded by Union veterans more than a century ago. In fact, separate statues honoring Union and Confederate veterans sit on opposite ends of sleepy Veterans Memorial Park on U.S. Highway 192 in this Osceola County town of about 48,000. The St. Cloud Confederate obelisk, installed just 11 years ago, is one of only two Confederate monuments in Florida known to have been dedicated since the 1970s, according to research by the Southern Poverty Law Center. The Washington Post reported at least 50 have been built since 1990. It hasn't generated any controversy, although it was reportedly defaced with graffiti after a white nationalist rally erupted in violence in Charlottesville, Va., in August.

Not even members of a local Union historical group think the Confederate monument should be moved. "We're not interested in having it torn down," said Roger Heiple, a 25-plus year member of the Sons of Union Veterans in St. Cloud, which put up its obelisk about 100 feet away in 2000. The white Union statue has a plaque attached honoring the Grand Army of the Republic, a fraternal organization for Union soldiers. It says the St. Cloud post "grew to be the second largest membership in the nation." The Confederate counterpart lists names of veterans from Osceola County and has quotes from Confederate generals Robert E. Lee and Stonewall Jackson. A Confederate battle flag is also engraved on the statue.

The Charlottesville rally opposing the removal of a statue of Lee has spurred discussions in Florida and elsewhere about Confederate memorials. Even before the rally, Orlando Mayor Buddy Dyer decided to move "Johnny Reb," a marble statue honoring fallen Confederate soldiers, from Lake Eola where it stood watch for more than 100 years. It will soon be on display in the city's Greenwood Cemetery near a Union memorial.

In Tallahassee, decisions over Civil War monuments could spill into the 2018 legislative session that opens in January. Democratic State Sen. Perry Thurston, D-Plantation, filed a bill to replace a statue of Confederate Gen. Edmund Kirby in the U.S. Capitol building with one of Mary McLeod Bethune, an African-American civil rights activist who founded Bethune-Cookman College. But in St. Cloud, officials say there has been no talk in City Hall about either statue. "No one has raised concerns regarding these memorials, which represent soldiers who fought on both sides of the Civil War and which have been located in the park for more than a decade," interim City Manager **Bill Sturgeon** said in a statement. "Should someone from our community bring the issue to the city, we will certainly address the matter."

Olive Horning, curator of nearby St. Cloud Heritage Museum, said she frequently chats with history buffs who drop by the museum to see the collection of Union and Confederate regalia, as well as other relics of the cities' past. The statues aren't well known in town, she said. "I had to

Internet – Newspaper Archives Searches**William (Bill) Sturgeon***(Articles are in reverse chronological order)*

actually go over to the park to see where they were," Horning said. "I'd be shocked if someone asked about them."

St. Cloud got its start when about 4,000 Union veterans flocked to it in 1909, drawn by 5-acre lots for \$50 apiece. But Mike Urell, Sons of Union Veterans commander, said few signs remain of the town's roots. "There's little left from either the Confederacy or the Union in the town," Heiple said. "Most of the homes have been sold that the veterans lived in. The people who own the homes have little idea of the history." The town's population is 56 percent white, 32 percent Hispanic and 7 percent black, U.S. Census data shows.

Al Massey, Sons of Confederate Veterans commander, declined to be interviewed for this story, but he told the Washington Post this month that "when we saw the Union monument go up, it seemed only fitting we have one."

Urell, a retired history teacher from New York, said he understands the "passions of different groups involved in this" but hopes the debate over memorials leads to more education about the Civil War. And perhaps, St. Cloud's statues can help. "I think if a young person was walking through this park today with their dad or mom ... and came upon either our statue or the Confederate statue, it might provoke a conversation," Urell said. "If the parents were well educated about the events and what had happened there, it might be a very valuable experience for them."

Bay News 9 (FL)

July 27, 2017

St. Cloud Running Out of Space Amid Rapid Growth, Says City Manager

Author: News 13 Florida

St. Cloud is growing at a very rapid rate, and with that comes the need for more space. City Manager **Bill Sturgeon** said St. Cloud is one of the fastest growing cities in Central Florida. In fact, the police, fire, and building department are all running out of space. The city was contemplating buying an old Irish pub on 918 New York Avenue, close to city hall, for more than \$1 million and transforming it into a new building department.

The idea generated negative comments by some on social media, but the city has since backed away from the idea. They are now looking into creating a study to try and figure out where and what needs to be expanded. “We want a master plan for the city hall campus, and that will take about a year to do. And then we will know where we need to do buildings and upgrades,” **Sturgeon** said. “Because we don’t want to just start putting buildings on our property here without any planning.”

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The [St. Cloud Community Redevelopment Agency](#) recently made an offer to buy the old Irish pub for \$350,000 to renovate and later lease out. Due to the growth, the CRA wants to attract more businesses to the downtown area. However, the CRA is waiting to hear back from the seller.

Internet – Newspaper Archives Searches
William (Bill) Sturgeon

(Articles are in reverse chronological order)

Bay News 9 (FL)
July 27, 2017

New St. Cloud city manager wants to make people proud to live there

Author: News 13 Florida

In the last two years, the city of St. Cloud has seen four individuals in the role of city manager. The latest: **Bill Sturgeon**, he's serving as interim city manager. "I was like every other employee -- hurting," **Sturgeon** said.

The former city manager Joe Helfenberger resigned. But before he did, a council member motioned to terminate him for making tax payments without telling the council first. That motion did not pass. In the last city meeting, Helfenberger said, "I think it would be mutually beneficial for myself and the city to do a voluntary separation agreement." In that meeting, it was insinuated that a council member threatened Helfenberger to hire a particular person as the Economic Development Recruiter, a temporary position initiated by the city manager.

Residents called for an investigation, most of the council agreed. "If we don't investigate, we condone. It really is that simple," said one resident during the meeting. Since the charter prohibits the council from directing who is hired or fired, **Sturgeon** has to now find an attorney to investigate if any of the council members committed a violation. In just a couple of months, two city directors resigned, another was fired. **Sturgeon** says he wants to help turn things around.

Sturgeon has been the Fire Chief of St. Cloud since 2013 but now the Deputy Fire Chief will fill that position. "I had to turn in all my fire equipment, my fire vehicle and it was a sad day," **Sturgeon** said. "This is my 37th year in the fire service." He's been serving as the assistant city manager for the past six months, experience he said will help with his plan of action.

"We're confused of the direction of the city," **Sturgeon** said. "And that's not anybody's fault, this is what happens in organizations sometimes when there is a transition. And my job is to try and get the ship going back in the right direction." **Sturgeon** is hopeful he will be permanently appointed to the position. "Get people involved, so they can sit here and stand from the end of New York Avenue look north," **Sturgeon** said, "And say this is my city. This is my kind of town and I helped build it." **Sturgeon** is currently reviewing applications for the directors of Finance, Public Works, and Economic Development.

Internet – Newspaper Archives Searches**William (Bill) Sturgeon***(Articles are in reverse chronological order)*

Positively Osceola (FL)

July 14, 2017

St. Cloud's City Manager Resigns and Fire Chief Bill Sturgeon is Named as Interim

Author: Positively Osceola

Half way through [City of St. Cloud's](#) regular meeting City Manager Joe Helfenberger announced that he had very much enjoyed working and serving the great people of St. Cloud, and then requested that the City Council accept his "mutual separation agreement" effective immediately. His resignation request was honored with a unanimous vote by the council. The resignation came as a surprise although there had been some strife over the last month in St. Cloud, including a motion being made by Councilman Donny Shoyer to terminate Mr. Helfenberger.

Councilwoman Linette Matheny then made a motion to name St. Cloud Fire Chief **Bill Sturgeon** as interim city manager and also St. Cloud Police Chief Pete Gauntlett as acting director of public services. Fire Chief **Sturgeon** spoke to the council I'm saying, "I am humbled and honored that you would entrust this position with me, I promise you I will work hard to work with our staff and our council to move this city into a positive and highly effective position." During the meeting councilman David Askew asked Mr. Helfenberger directly if he had been asked by a council member to hire Chris Robertson for the economic development director position. Askew then described his understanding of the situation by asking Helfenberger whether the council member in question threatened to fire him if he did not hire Robertson. Helfenberger replied "yes." Askew also asked Mr. Helfenberger whether anyone else was in the room at the time, and Mr. Helfenberger replied, "no."

Two citizens in the audience spoke at the podium supporting Mr. Askew's reporting of the incident, which led council member Cooper to comment and deny that the incident took place as stated by Mr. Askew and the audience members who spoke. Cooper said, "I did not threaten anybody." Mr. Askew made a motion for there to be an investigation into the incident. Askew made a motion to investigate that issue, and that council members cannot hire or fire city employees. The motion passed 4-1 with Council Member Cooper being the only no vote. Council member Lynette Matheny and Mayor Nathan Blackwell both thanked Helfenberger for his service to the city and Mayor Blackwell went on to say "I appreciate the sacrifices that he made. My prayers will be with him as he seeks a new direction."

Internet – Newspaper Archives Searches**William (Bill) Sturgeon***(Articles are in reverse chronological order)*

My News 13 (FL)
September 7, 2016

St. Cloud's breaks ground on new, modern fire station

Author: News 13 Florida

The city of St. Cloud has been having money issues for the past year but it figured out a way to build a new fire station. The city broke ground on the new fire station Wednesday morning. It will be located on Friars Cove Lane and replace fire station 33 on Cord Avenue. "It's exciting," said firefighter Robert Wise. Station 33 opened back in 2007. It was meant to be a temporary mobile-type facility until a more permanent station could be built, something that never happened until now. Wise, who works 24 hour shifts, is happy to finally see it come together. "We are here quite a bit, I call this my second home," Wise said.

Even after the new building is completed, the station on Cord Avenue will continue to be used for training. The \$450,000 project will mirror one of Lake County's recent projects. This lower cost design saved the city about \$3 million. "It's going to be a modern, technologically advanced building, environmentally friendly and allow firefighters quick access to this district," said St. Cloud Fire Rescue Chief **William Sturgeon**.

The savings are much-needed, as St. Cloud faced a deficit last year. And because of that the city proposed a hefty fire fee for homeowners. That fire fee never happened and a new administration took over. The current city manager Joe Helfenberger says the budget issues have been resolved and the city no longer has a deficit. "We properly allocated some staffing costs where they should be so that the general fund may have been doing some subsidizing, but that's not happening now," Helfenberger said.

With the new building, response times will improve from 2 minutes to 20 seconds in the southern end of the city. For Wise this new development means a better way to serve his community. I am really proud to be a part of this," he said. Construction for the new fire station will be completed in the spring of 2017.

Internet – Newspaper Archives Searches**William (Bill) Sturgeon***(Articles are in reverse chronological order)*

Orlando Sentinel, The (FL)
September 30, 2015

8-year-old becomes hero in St. Cloud

Author/Byline: Henry Pierson Curtis

Alexandra Becerril, 8, stayed calm. Feet away, her 17-year-old brother Alejandro Arroyo was passed out on the living room floor of the family's St. Cloud home. While their mom made sure Alejandro was breathing, the youngster asked if it was OK to call for help. And then she called 911 at 2:19 p.m. on Aug. 5, records show. "She's very intelligent," her mother Kim Arroyo said Tuesday. "She's very -- how can I say -- very emotional but she was very brave."

Alexandra quickly answered the 911 dispatchers' questions about her family's address, her brother's age and how Alejandro hadn't eaten since having four wisdom teeth pulled earlier in the day. And the Lakeview Elementary School third-grader relayed the dispatchers' instructions about what to do, said her mother. Those included making Alejandro comfortable, keeping him lying on the floor and not to giving him anything to eat or drink. By then, fire department paramedics were on their way to the Summer Cove Apartments on Pineland Court.

Alejandro is fine now, said Kim Arroyo. His sister's quick thinking and calm behavior will be honored Wednesday afternoon by the police and fire departments when she is named the city's first 911 Hero. The dispatchers who handled the emergency call, Cristina Andres and Dyana Fischer, wanted Alexandra recognized for how well she responded. The city had never honored anyone before but 911 Dispatch Manager Lizzy Graham found other states had 911 awards and city officials agreed to award them, according to interviews.

"Alexandra's actions resulted in providing vital information which was pertinent for the responding units," said Fire Chief **William Sturgeon**. "Children who know how to call 911 in an emergency could save a life."

The 911 dispatch center inside the police department at 4700 Neptune Road receives about 25 medical calls and 164 police service calls. "Teach your child how to call 911, tell dispatchers the location of the emergency and only call 911 for true emergencies such as fire, medical emergencies, car accidents, stranger danger, et cetera," said Police Chief Pete Gauntlett. Alexandra will receive a medal during a ceremony 3 p.m. Wednesday at police headquarters.

Internet – Newspaper Archives Searches

William (Bill) Sturgeon

(Articles are in reverse chronological order)

Orlando Sentinel, The (FL)

February 1, 2014

St. Cloud home destroyed in morning fire

Author/Byline: Tiffany Walden

A St. Cloud woman escaped just before her home was destroyed by fire on Friday. Firefighters said the home's smoke detector is what saved her life.

The homeowner, who was not named, was awakened when the smoke alarm went off. "The home was a total loss and the occupant's vehicle was also damaged," St. Cloud Fire Chief **William Sturgeon** said. "The fact that a working smoke alarm was in the home helped save this resident's life and neighbors are now assisting the homeowner."

The cause of the fire still is under investigation. Firefighters said there was no one else in the home when it went up in flames.

The leading cause of home fires are cooking, heating, electrical equipment, unattended candles and smoking materials, according to City of St. Cloud spokeswoman Sandra Ramirez.

"Thousands of people die in home fires every year," she said. "Nearly all of these deaths could be prevented by taking a few simple precautions, such as having working smoke alarms and a home fire escape plan."

Internet – Newspaper Archives Searches

William (Bill) Sturgeon

(Articles are in reverse chronological order)

The Orlando Sentinel (FL)

September 6, 2013

St. Cloud's assistant chief gets top fire job

Author: David Breen

St. Cloud has promoted from within to replace its recently retired fire chief. St. Cloud Fire Rescue Assistant Chief **William Sturgeon** was named to the top job this week by City Manager Tom Hurt. He succeeds Bill Johnston, who retired Aug. 16. "Chief **Sturgeon** has been with us for about five months and has quickly demonstrated his abilities as a leader, an educator and a safety advocate," Hurt said in announcing the promotion. **Sturgeon** served with Orange County Fire Rescue from 1986 to 2010.

Internet – Newspaper Archives Searches**William (Bill) Sturgeon***(Articles are in reverse chronological order)*

Orlando Sentinel, The (FL)
September 18, 2005

4 families left homeless after blaze - No one was hurt in the apartment-building fire on Silver Star Road in Pine Hills.

Author/Byline: April Hunt

Four families were homeless after a fire raced through an apartment building Saturday afternoon, officials said. No one was injured. An overloaded extension cord in one of the apartments caused the fire, said Orange County Fire Rescue Lt. Frank Raike. Apparently several pieces of electronic equipment were plugged into the cord, sparking the fire, he said.

Six firetrucks from the Orange County Fire Department found the second-floor apartment ablaze when they responded to Park Hamilton Apartments on Silver Star Road about 3 p.m. Firefighters rapidly searched the dwelling because neighbors earlier thought an infant was inside, said Battalion Chief **William Sturgeon**. "Fortunately that report was not true, and everyone has been accounted for," **Sturgeon** said.

The fire spread rapidly from the living room and out through the back patio, which at first caused authorities to think it was suspicious. Orange County fire officials contacted the State Fire Marshal for help in the investigation. Later investigation led them to the extension cord, officials said. The apartment downstairs, as well as the upstairs and downstairs apartments adjacent, suffered enough smoke and water damage that they are uninhabitable.

Jessica Santiago, leasing agent at the 330-unit complex, said the downstairs neighbors were first to notice the smoke and called the apartment office for help. Santiago called for the fire department, then went with Brandon Negron, the complex's district assistant, to evacuate apartments in Building 5914. "We went and knocked on doors to make sure everyone was out," Santiago said. "No one was around [in the apartment where the fire began]."

Two adults and three children lived in the unit where the fire began, but it was unclear Saturday how many other people the fire displaced. The victims are being referred to the American Red Cross for emergency assistance.

Internet – Newspaper Archives Searches**William (Bill) Sturgeon***(Articles are in reverse chronological order)*

Orlando Sentinel, The (FL)

August 8, 2003

FLASH FIRE NEAR GAS TANK INJURES WORKERS RAZING PINE HILLS SITE - THE THREE WERE SLICING THROUGH A WALL WITH A GAS-POWERED SAW WHEN THE BLAZE SUDDENLY OCCURRED.

Author/Byline: Pedro Ruz Gutierrez

Morite Castry was relaxing at his home on Ben Hogan Circle in Pine Hills on Thursday morning when a loud boom rattled his house. Castry, 53, ran outside, where he saw three construction workers screaming for help as they doused their faces and bodies with water from a hose. The trio had just suffered first- and second-degree burns to their faces and hands after a flash fire near a propane-gas tank, authorities said. Flash fires are fast-moving flames that can cause explosions and generally last fewer than three seconds. "I said, 'Hey, guys, do you need any help?' " recalled Castry, who lives next to a sewage lift station where James Huddleton, 60, Lee Glenn, 33, and Michael Carter, 30, were working. "Yes, call 911," one of them told him. Emergency workers arrived shortly after Castry's 10:54 a.m. call.

Orange County Fire Rescue personnel said the three Prime Construction Group workers were using a gas-powered saw to cut into the concrete walls inside the station when the fire occurred. The crew was demolishing the station. Huddleton and Carter were treated and released from Orlando Regional Medical Center, while Glenn was listed in stable condition Thursday evening at the hospital.

William Sturgeon, a Fire Department safety officer, said investigators will look at whether the propane tank behind the station may have contributed to an explosion. The tank, which was shut off by emergency crews at about 11:15 a.m., is estimated to hold between 300 and 500 gallons of gas.

Castry said he fears another accident or explosion because he lives next door to the old station. "I don't know if after that explosion, I'll be safe here," he said. Orange County sheriff's investigators and the county's utilities department and risk-management office are investigating the incident.

Internet – Newspaper Archives Searches**William (Bill) Sturgeon***(Articles are in reverse chronological order)*

Orlando Sentinel, The (FL)

October 18, 2001

TEAM STEELS FOR HAZARDOUS DUTY - CHECKING AN ODD SUBSTANCE ON LETTERS AT ORLANDO INTERNATIONAL AIRPORT WAS PART OF A DAY'S WORK FOR TWO WITH SPECIAL SERVICES.

Author/Byline: Anthony Colarossi

Joe Silvestris raced toward Orlando International Airport on Wednesday afternoon, sirens blaring on his haz-mat truck and a mobile computer telling him what to expect. A batch of letters was waiting on the tarmac near Gate 95. They were tucked in a mail tray pulled from the belly of a Delta Air Lines jet. The letters, addressed to the White House for the Afghan Children's Fund, appeared to have been tampered with, sprinkled with a yellow powder. Anthrax, baggage handlers feared.

Silvestris, 34, and his partner, Rick Gunter, 41, prayed it was just another hoax, like dozens of calls the hazardous-materials technicians for Orange County Fire Rescue have worked in the past week. But their professional training -- coupled with the details about how these letters looked and where they were headed -- made them prepare for the worst. "You always have to keep your guard up; you always have to treat it like the real thing," Silvestris said just before donning a biohazard suit to sort through and find the suspect letters.

Welcome to a new front line in the nation's war against terrorism. The location can change hourly. Its soldiers are highly trained emergency workers who find themselves several times a day going where no one else will, facing the risk of exposing themselves to deadly materials and acting as crisis counselors on the fly. "In that respect, we are on the front line," Silvestris said. "We're going to try to stop the threat before it gets to the community." Silvestris, Gunter and the county's elite Special Services team operating out of Station 50 on 29th Street have been running nonstop since Oct. 11, when President Bush called the country to high alert and anthrax became the epicenter of American anxiety.

SPECIAL SUITS, RUBBER GLOVES

While Silvestris and Gunter say they're always concerned going into an anthrax scare, they have become accustomed to the risks. They wear heavy, protective suits made of plastic like material that get trashed as soon as their search is done. They wear two pairs of rubber gloves -- purple on the first layer, black on the outer -- in case one is ripped. They breathe safe air from 35-pound tanks on their backs, feeding oxygen through special masks cowled in yellow mesh. It is, for these workers, a measure of safety and security in the face of anxious situations. "I'm more nervous going into a chlorine leak," Gunter said.

Since last week, Silvestris and Gunter have responded to unlikely threats in numbers that they have never before seen -- places where people have mistaken baby powder and even bird droppings for anthrax. And they have run to facilities such as the post office -- or, as with the

Internet – Newspaper Archives Searches**William (Bill) Sturgeon***(Articles are in reverse chronological order)*

Wednesday run, to the airport -- where the threat has a circumstance that, in their words, makes it "highly credible." While emergency-response crews throughout Central Florida and the nation have faced a tidal wave of calls since last week, officials are making sure they pace their crews. The crew that includes Silvestris and Gunter, for example, works shifts of 24 hours on, 48 hours off. Overtime, though, has been a necessity in recent days. "It's been a little chaotic," said Frank Roca, a member of the crew. "It's sad it's taken something like this to show the public what we do." The team is so well-prepared, its members can test for anthrax on the scene and get a preliminary result in 15 minutes. One member compared it to a home pregnancy test.

FBI WILL TEST LETTERS

At the airport Wednesday, Silvestris and Gunter found what they said was a "liquid powder mixture" on two letters but couldn't scoop up enough of the suspicious substance to run the field test. So they bagged the letters, placed each into a sealed metal can and turned the evidence over to FBI agents waiting for their assessment. An FBI lab will test the letters.

As Silvestris and Gunter searched for signs of anthrax in the isolated baggage trailer, they communicated by radio with Lt. **Bill Sturgeon**, their haz-mat team leader 30 yards away. The circumstances, **Sturgeon** said, demanded the highest degree of caution. "This is probably a high threat. It will be processed in a lab by the FBI," **Sturgeon** said. "It's most likely nothing, but we treat it as a higher-level threat." Ever since the bombing at the 1996 Olympics in Atlanta, **Sturgeon** and his men have been training and buying equipment for scenarios just like they faced Wednesday.

They have trained with real biological and chemical agents. They're well-versed in the terms of chemical and biological warfare. And they know what just a few anthrax mailings to highly visible institutions can do to the minds of millions. Before last week, **Sturgeon** said, anthrax scares were rare -- at least by the standard of recent days.

'CONTAINING THE FEAR'

"It [anthrax] is not an easy weapon to deploy to get mass casualties," **Sturgeon** said. "But what the terrorist wants is a psychological impact." That's another attack the haz-mat crews are facing and trying to tackle with professionalism. "The majority of the calls we're getting are concerned citizens, good-intent calls," he said. "Containing the fear: That's done through our demeanor and how we respond."

Orlando Sentinel, The (FL)

September 22, 1991

MOWER INJURY VICTIM ON ROAD TO RECOVERY

Author/Byline: Susan Jacobson

Six-year-old Matt McKee may be one of the luckiest children around. Last month, Matt was one of two Central Florida youngsters who were victims of riding lawn mower accidents. The St. Cloud boy severed several tendons and lost two toes on his right foot and the heel bone in his left foot on Aug. 18. Less than two weeks later, 3-year-old Alice Graham of Oviedo was killed by a lawn mower blade. Matt is getting used to his crutches, and for a time was wondering whether he would get new toes. "I feel very lucky that he's here with us and that he will walk again," said his mother, Debbie Konin of St. Cloud. After nearly a month in the hospital, Matt is back home with his father, Joe McKee, and stepmother, Sandi McKee, wearing casts on both feet. The shy, slight youngster spends his days maneuvering his new radio-controlled dump truck, watching TV and playing with the family's five dogs.

Matt was supposed to start school at Michigan Avenue Elementary the day after the accident, but now he plans to study at home with a teacher who will visit him. His family anticipates a year of periodic surgeries, but doctors say he will be able to walk eventually. It is unclear how completely he will recover. "Matt's taking it better than any of the rest of us. He keeps thinking his toes are growing back," said Sandi McKee, a registration clerk at the Kissimmee Memorial Hospital emergency room. Her husband said they have talked to Matt and he now understands some of his injuries are permanent.

Last week at home, Matt behaved much like any other 6-year-old: He talked about the "icky" medicine he must take, said he wants to work at Sea World when he grows up, and played with his truck, a gift from the Osceola chapter of ABATE, a group of motorcycle enthusiasts. Matt's parents are lifetime members. Meanwhile, the adults in the family try to look ahead and hope for a swift recovery. Konin and Sandi McKee said that since the accident they have reordered their priorities. Both said they still have nightmares about what happened. "I'm going to spend a lot more time with them," said Konin, a restaurant hostess who also has a 7-year-old daughter. "I'm not going to let my job get in the way like it was."

McKee agreed. "All my values have changed," she said. "You don't know how much time you're given." The family said friends have been tremendously supportive during the ordeal, bringing gifts and raising money to compensate for wages lost when the adults took time off from work. Even the Orange County helicopter pilot and paramedic, who probably saved Matt's life by whisking him to Orlando Regional Medical Center in less than 10 minutes, have visited.

Paramedic **Bill Sturgeon**, 28, said he usually tries to stay detached. But the father of two was touched by the severity of Matt's injuries and his will to live. "He was about as close to dying as anybody I've seen," **Sturgeon** said of Matt. **Sturgeon** said the accident made such a deep impression on him that he no longer lets his children go outside while he mows the lawn.

Internet – Newspaper Archives Searches**William (Bill) Sturgeon***(Articles are in reverse chronological order)*

Matt's sister, Brooke, said she hopes to become a paramedic like the rescue workers who saved her brother's life. Konin said Brooke has doted on her brother since he has been home, bringing him toys and favorite treats like grilled cheese sandwiches. "I'm glad he's here with us today," Brooke said. "I love him. He's the only brother I have."

Internet – Newspaper Archives Searches**William (Bill) Sturgeon***(Articles are in reverse chronological order)*

Orlando Sentinel, The (FL)

August 23, 1991

BOY TOOK THE RIDE FOR HIS LIFE IN A RESCUE HELICOPTER

Author/Byline: Michael Blumfield

Since he was a toddler, Matt McKee had sat behind his dad on the riding lawn mower whenever the grass got too high. In an instant, they learned what a bad idea that was. Matt fell off the mower, and the blade slashed his feet. His dad grabbed him, and the blade slashed again, tearing the man's hand. It took a helicopter ride from their home near St. Cloud to Orlando Regional Medical Center to save Matt's life Sunday night. On Thursday, the helicopter's pilot and emergency medical technician went to Arnold Palmer Hospital for Children & Women to visit Matt, a 6-year-old whom they say was one of their best patients. "The kid really had a strong will to live, because he was really going down the drain, to be honest," EMT **Bill Sturgeon** said.

Here is how it happened, as described Thursday by the participants: Matt's stepmother, Sandi McKee, saw what happened and phoned 911. She elevated Matt's legs to slow the bleeding, and EMTs from the Osceola County Fire and Rescue department gave first aid until the helicopter arrived. The primary rescue helicopter was already dispatched, so **Sturgeon**, 27, and pilot Fred Davis, 35, flew from their station near Sea World to the McKee home east of St. Cloud. They strapped Matt in, hooked up a blood pressure and heart monitor, gave him an oxygen mask and took off.

Matt was conscious, so **Sturgeon** hooked a headset on him so they could talk above the engine noise while Davis pushed the craft toward its top speed of 130 mph. Air-traffic controllers at Orlando International Airport waved off Boeing 727s making scheduled landings so the helicopter could have a straight shot to the hospital. It was turning dark. Lights came on, and Matt sat up, trying to get a view. **Sturgeon** pointed out Walt Disney World and Sea World in the distance. He asked Matt what sports he liked to play. Matt said baseball. The boy said he was going to start school the next day, and **Sturgeon** told him it might be a while before he did.

Matt was extremely thirsty, indicating severe shock. Suddenly, he lost consciousness. **Sturgeon** gave him more oxygen and increased the flow of an intravenous solution. Matt woke up. "How much longer, Fred?" **Sturgeon** asked the helicopter pilot. "How much longer?" **Sturgeon**, the father of an 8-year-old, felt himself getting emotionally involved. He backed off, knowing that it would make it harder for him to do his job. It was an eight-minute flight until the helicopter landed on the hospital's roof. Surgeons immediately operated, removing two toes on one foot, reattaching a heel on the other.

Matt, who weighs less than 60 pounds, lost so much blood on the way that it took the helicopter team 3 1/2 hours to clean it up. Normally, the rescue team never sees a patient again, but Matt had whispered to his family that he wanted to see the men in the green jumpsuits. "It's the pilots," he said as they walked into his room Thursday. They gave him a pair of official patches from the

Internet – Newspaper Archives Searches**William (Bill) Sturgeon***(Articles are in reverse chronological order)*

Orange County Sheriff's Office as well as a teddy bear and an autographed photo of the helicopter. A pack of relatives hovered around, videotaping the meeting.

Sturgeon, who has been an EMT for six years, said he was glad to make the visit. "It's really emotionally satisfying to see," he said, realizing that the advanced training he had done for such situations paid off.

Doctors say Matt will be in the hospital for several weeks, but is expected to recover. The flight team received no end of thanks from the relatives, including Matt's mother, Debbie Konin, and his father, Joe McKee. McKee, an aircraft mechanic, was wearing a heavy bandage on one hand, the remnant of his trip to the hospital. The elder McKee went by ambulance. "I had the slow ride," he said.

Orlando Sentinel, The (FL)

June 6, 1989

WITH SHERIFF'S COPTER AT WORK, THERE'S NO ONE ABOVE THE LAW

By Jay Hamburg of The Sentinel Staff

Below him, white birds skimmed over treetops. And below the birds, police officers on the ground squinted up at roofs. Cpl. Bill Armstrong nudged the controls of his helicopter and swooped over Orlando at 85 mph toward Lake Formosa near Virginia Drive and Orange Avenue. The officers on the ground thought they had an armed burglar trapped on the roofs of some businesses in a two- or three-block area. But they couldn't see much from their vantage point. So they had called the only police helicopter unit in Orange, Seminole and Osceola counties - the Orange County Sheriff's Office aviation squad.

Hovering at 600 feet in the craft known as Chase II, Armstrong paused before diving to search for rooftop burglars. He looked first for antennas, some of which jutted nearly 200 feet into the sky. These are the ones not required to have blinking lights, and if he has to swoop in low, they can be deadly. "Daytime is not too bad," Armstrong said as he circled the lake. "Nighttime is really treacherous."

Armstrong, 35, has 15 years on the force, five in the helicopter unit. He scanned the rooftops with Orange County paramedic **Bill Sturgeon**, 25, who accompanied him on the flight. They saw no suspects. "Rooftops appear to be secure," Armstrong radioed to the ground. "No activity."

"Thank you, sir," came the reply from an Orlando police officer. The officers returned to their cars, and Armstrong flew off to answer another call. "What we just did in five minutes, it would take 12 cops to do," Armstrong said.

On a busy shift, they may carry three critically injured victims, chase drivers trying to outrun them on the ground or check planes doing dangerous stunts. This weekend night was starting routinely. But each night is unpredictable, so the paramedics also are trained as auxiliary deputies and authorized to carry handguns.

Armstrong next headed south to patrol International Drive to let potential thieves and robbers know they're being watched and to look for hunters trespassing on the adjacent Martin Marietta property. "This is basically a patrol car in the air, as well as an air ambulance," Armstrong said as he answered another call for help at Braun Cadillac on West Colonial Drive. A silent alarm had gone off. He got there in minutes and circled the area. "Appears to be customers in the parking lot," he radioed to the dispatcher. "No other activity."

Then came an accident report. A motorcyclist had crashed near Lake Destiny and Wymore Road just inside Altamonte Springs city limits. The helicopter caught up with and outraced a speeding ambulance and then hovered, waiting for officers on the ground to file a report. The victim was stable enough to be taken by ground ambulance, so Armstrong and **Sturgeon** flew back toward

Internet – Newspaper Archives Searches**William (Bill) Sturgeon***(Articles are in reverse chronological order)*

Orlando. The \$960,000 helicopter is the second Bell Jet Ranger bought by Orange County to chase bad guys, patrol high-crime areas and take critically injured people to hospitals. The copter can take off from anywhere in Orange and reach the trauma unit at Orlando Regional Medical Center in seven minutes. Indeed, there were so many medical emergency runs that the fire department bought the second Jet Ranger in 1988. The six pilots hope to begin training soon in dumping water from 120-gallon buckets for firefighting and dropping safety nets for highrise rescues.

In 1988, Chase I and Chase II answered 2,236 calls for police or medical help and transported 155 accident victims. "You've got a 90 percent save rate, if you can get them in surgery by one hour" after the call, said paramedic Scott Seigler, 28, who came on duty for the night shift. During night flights, Seigler operates the FLIR, the forward looking infrared camera that can scan a square mile on the ground while the helicopter is still a mile away. The camera "sees" heat and translates the signals into a picture on a screen in the cockpit. The picture looks like a cross between a negative and a black-and-white television. The images are generally sharp. Tires on moving cars show up white because they are hot. Sometimes on colder days, they can see the footsteps - the heat imprints - left by a fleeing suspect.

Seigler saw something on the screen. It looked like a small fire south of Sea World. Armstrong headed the copter toward it and circled the area. Seigler flipped on the 30 million candlepower spotlight, called a Night Sun. From 800 feet high, the Night Sun can send out a sharply focused beam of light. It illuminated a few campers around a small fire, but Armstrong decided not to turn on the public address system and order them to put it out. They were across the Osceola County line, anyway, and the fire didn't seem to pose a danger.

Then came a call to investigate a street disturbance in Tangelo Park. Armstrong swung the copter around. From 800 feet high at night, Orlando seemed like a toy landscape, full of little bulbs, amber and white. Off in the distance, fireworks from Epcot Center sprinkled the sky with color.

In the past, especially over neighborhoods where crack cocaine is dealt, there have been reports of gunshots fired at the helicopter. "Build up the armor plating," Armstrong told Seigler, jokingly, as he darted across the sky toward his next call.

Research Compiled by: Shannon Farr & Amanda Dillabough
 Colin Baenziger & Associates

Salaries

Candidate Salaries

The following are the base salaries that the semi-finalist candidates gave to us. Although salary is always a consideration, we recommend that it not be the determining factor. A highly qualified, experienced candidate may warrant a higher salary. That individual may well save the City several times the difference in salary by making better decisions.

We should also add that we have spoken with all the candidates and made it clear what the City wants to pay. Each has agreed to accept a salary in the advertised range.

<u>Candidate</u>	<u>Current / Most Recent Salary</u>
Andrew A. Butterfield	\$ 120,000
Kathleen A. Gunn	225,000
C. Anthony Hammond	108,000
David D. Molgaard	*168,504
J. Mark Rooney	**
J. Tyson Ross	175,000
William E. Schmeling	130,000
W. Lee Smith	253,000
William E. Sturgeon	***167,000

*Mr. Molgaard's most relevant salary.

**Mr. Rooney is looking for the right fit in his next job. Fortunately, although he is relatively young, he is eligible to retire in the Illinois pension system. As a result, job satisfaction is much more important than matching or exceeding his prior salary. Hence, while he was earning \$193,500 in his most recent job, he is willing to accept a lower salary for the right position.

***Mr. Sturgeon's most relevant salary.

We suggest you ask the finalists about their salary requirements when you interview them.