

TOWN COUNCIL
Town of Trumbull
CONNECTICUT
www.trumbull-ct.gov

TOWN HALL
Trumbull

TELEPHONE
(203) 452-5000



AGENDA No. 740

- I CALL TO ORDER
- II MOMENT OF SILENCE
- III PLEDGE OF ALLEGIANCE
- V ROLL CALL
- VI PUBLIC COMMENT
- VII APPROVAL OF MINUTES
- VIII NEW BUSINESS

DATE: June 1, 2015
TIME: 8:00 p.m.
PLACE: Town Hall

NOTICE is hereby given that the Town Council of the Town of Trumbull, Connecticut will hold a regular meeting on Monday, June 1, 2015 at 8:00 p.m. at the Trumbull Town Hall, for the following purpose:

-
1. RESOLUTION TC25-176: To consider and act upon a resolution which would approve the following programs as eligible under the Neighborhood Assistance Act; Trumbull Nature & Arts Center "Educational Exhibits" - \$6,000; Southwestern area Health Education Center, Inc. "Community Health Workers: Helping our neediest to manage their Asthma" - \$24,000; will require post project review if full amount of request is obtained. (L&A Public Hearing)
 2. RESOLUTION TC25-175: To consider and act upon a resolution which would authorize the First Selectman to sign a lease agreement between Verizon Wireless and the Town of Trumbull for town-owned land off Jeffrey Place, more specifically designated by Lat. 41°-15'-5.57", Long. -73°-11'-35.18". (L&A Public Hearing)
 3. RESOLUTION TC25-178: To consider and act upon a resolution which would appropriate \$45,500 from the Fund Balance to 01011400-522202 BOF-Professional Services - \$15,166, 010180400-522202 Rec-Professional Services - \$15,167 and 01080600-522202 Parks-Professional Services - \$15,167. (Finance)
 4. RESOLUTION TC25-177: To consider and act upon a resolution which would establish the Board of Health Fee schedule effective July 1, 2015. (Finance Public Hearing)

5. RESOLUTION TC25-172: To consider and act upon a resolution which would amend Chapter 18 Taxation of the Trumbull Municipal Code to include Article VI, Senior and Disabled Volunteer Tax Abatement. (L&A Public Hearing)
6. RESOLUTION TC25-173: To consider and act upon a resolution which would amend Chapter 2 Administration, Article II of the Trumbull Municipal Code to include Section 2-55 et seq, Trumbull Compensation Plan for non-union, appointed and elected officials. (Finance Public Hearing)

VIII ADJOURNMENT

COPY OF THE RESOLUTION ATTACHED HERETO
Carl A. Massaro, Jr., Chairman Trumbull Town Council

RESOLUTIONS

1. RESOLUTION TC25-176: BE IT RESOLVED, That the following programs are hereby approved as eligible under the Neighborhood Assistance Act; Trumbull Nature & Arts Center "Educational Exhibits" - \$6,000; Southwestern area Health Education Center, Inc. "Community Health Workers: Helping our neediest to manage their Asthma" - \$24,000; will require post project review if full amount of request is obtained.
2. RESOLUTION TC25-175: BE IT RESOLVED, That the First Selectman is hereby authorized to sign a lease agreement between Verizon Wireless and the Town of Trumbull for town-owned land off Jeffrey Place, more specifically designated by Lat. 41°-15'-5.57", Long. -73°-11'-35.18".
3. RESOLUTION TC25-178: BE IT RESOLVED, That \$45,500 is hereby appropriated from the Fund Balance to 01011400-522202 BOF-Professional Services - \$15,166, 010180400-522202 Rec-Professional Services - \$15,167 and 01080600-522202 Parks-Professional Services - \$15,167.
4. RESOLUTION TC25-177: BE IT RESOLVED, That the Board of Health Fee schedule is hereby established effective July 1, 2015.
5. RESOLUTION TC25-172: BE IT RESOLVED AND ORDAINED, That Chapter 18 Taxation of the Trumbull Municipal Code is hereby amended to include Article VI, Senior and Disabled Volunteer Tax Abatement.
6. RESOLUTION TC25-173: BE IT RESOLVED AND ORDAINED, That Chapter 2 Administration, Article II of the Trumbull Municipal Code is hereby amended to include Section 2-55 et seq, Trumbull Compensation Plan for non-union, appointed and elected officials.

Sec. _____ Senior and Disabled Persons Volunteer Tax Relief.

(a) *Purpose.* In order to promote community development through service to the Town of Trumbull by drawing on the skills, knowledge and experience of its senior and disabled citizens, the town hereby establishes a program of tax relief for qualifying seniors and disabled persons who choose to give their time, talent and energy by volunteering to provide services to the Town.

(b) *Qualifications and benefits.* Beginning with the Grand List of 2015, qualifying taxpayers who volunteer fifty (50) hours of service to the Town of Trumbull shall be eligible for a tax credit not to exceed three hundred (\$300.00) upon his or her real property taxes in accordance with the provisions of hereof. The service period shall be July 1, 2015 to December 31, 2015.

For this Grand List, the aggregate total of participants shall not exceed 50 and the aggregate total of credits shall not exceed \$15,000.00.

Beginning with the grand list of 2016, qualifying taxpayers who volunteer to provide one hundred (100) hours of service to the Town of Trumbull, shall be eligible for a tax credit upon his or her real estate taxes in accordance with the provisions hereof. The service period shall be the calendar year of 2016, et seq.

For the Grand List of 2016, et seq, the aggregate total of participants shall not exceed 50 and the aggregate total of credits shall not exceed \$30,000.00.

In order to qualify for the benefits of this volunteer tax relief program, residents

(i) at the close of the preceding calendar year must be sixty-five years of age and over, or whose spouses, living with them, are sixty-five years of age or over, or sixty years of age or over and the surviving spouse of a taxpayer qualified in this municipality under this section at the time of his or her death or with respect to real property on which such residents or their spouses are liable for taxes under section 12-48 of the Connecticut General Statutes, or at the close of the preceding calendar year have not attained sixty-five years of age but are eligible in accordance with applicable federal regulations to receive permanent total disability benefits under Social Security, or have not engaged in employment covered by Social Security and accordingly have not qualified for benefits thereunder, but who has become qualified for permanent total disability benefits under any federal, state or local government retirement or disability plan, including the Railroad Retirement Act and any government-related teacher's retirement plan, in which requirements with respect qualifications for such permanent total disability benefits are comparable to such requirements under Social Security, and

(ii) must volunteer the requisite hours of service as set forth in this subsection (b), and

(iii) own or be held in trust for their benefit and occupy as their principal residence, real property in the Town of Trumbull or be liable for the payment of taxes thereon pursuant to Section 12-48 of the Connecticut General Statutes, and

(iv) must not be delinquent on the payment of any taxes or assessments due the Town of Trumbull or the Trumbull Water Pollution Control Authority

Qualifying taxpayers who participate in this program for the Grand List years of 2016 and thereafter and shall have reached the minimum requirement of one hundred (100) hours of service as set forth herein shall be entitled to a tax credit of a fixed amount of not more than six hundred dollars (\$600.00), provided that said taxpayer satisfies the conditions of subsections (b) and (c). No more than two qualifying taxpayers who participate in this program and reside in the same principal residence may be entitled to a tax credit under this program, provided both taxpayers satisfy the conditions of subsections (b) and (c). Qualifying taxpayers must reach the specific number of hours as set forth herein to be eligible for the respective tax credits. In no event may the amount of tax credits per household exceed the amount of real property tax levied against the residence.

(c) *Program implementation.* The Tax Assessor, or its designee, shall be responsible for administration of the Senior and Disabled Persons Volunteer Tax Relief Program.

For Grand List year 2015, the Assessor shall prepare a list of approved Town related activities and services, excluding the Board of Education, for which qualifying taxpayers may choose to volunteer. Eligible taxpayers shall submit a completed application form and authorize a background check. Placements shall be based upon the skills, interests and applicant's ability to perform all duties and responsibilities of the placement.

For Grand List year 2016, et seq, the Assessor shall create an approved list of qualifying scientific, educational, literary, historical, governmental, charitable and non-profit entities located in the Town of Trumbull for which qualifying taxpayers may choose to volunteer in addition to Town-related activities and services. Such entities shall meet the spirit and intent of the ordinance, and provide direct benefit and support to the Trumbull Community. The Tax Assessor shall prepare application forms to be completed by taxpayers qualifying for benefits hereunder who wish to participate in the senior volunteer tax relief program.

Volunteer hours are to be completed in one calendar year. They shall be certified by the department or entity for which the services are rendered and submitted to the Tax Assessor by January 31st following the calendar year of service. Accumulated volunteer hours not reaching the minimum number to earn the tax credit may not be carried over to the following year. The Tax Assessor shall coordinate the application of the credit to the taxpayer's bill with the Tax Collector.

The tax credit earned shall be applied to the tax bill issued for payment in July of the year following the calendar year of service.

(d) *Disqualification.* Any such property tax relief granted to any such resident shall not

disqualify such resident with respect to any benefits for which such resident shall be eligible under the provisions of C.G.S. 12-129b to 12-129d, inclusive, and 12-170aa, and any such property tax relief provided under this section shall be in addition to any such benefits for which such resident shall be eligible under said sections. Notwithstanding the foregoing, a resident is ineligible to apply for this program

(i) if at the time of such application, the resident is delinquent in any taxes owed to the Town of Trumbull or the Water Pollution Control Authority, and (ii) for any grand list year that such resident is also receiving benefits pursuant to the Town's Senior Tax Deferral Relief Program. For the purposes of this program, the hours spent by a resident as an elected or appointed town or government official, volunteer firefighter or emergency service personnel, or employee, shall not be included in the determination of total number of requisite hours volunteered by the resident.

(e) *Termination/Amendment.* This program may be terminated or amended by the Town Council at any time with or without cause in the event it is deemed by the Town to be in its best interest to do so.

TOWN OF TRUMBULL
BOARD OF FINANCE

REQUEST FOR ACTION

DATE: 14-May-15
AGENDA: 5-15-04
AMOUNT: \$45,500

2014-2015

(A) APPROPRIATION [] FROM: ACCOUNT NO. See attached \$45,500
ACCOUNT NAME

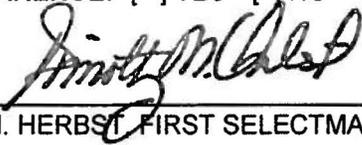
(B) TRANSFER [X] TO: ACCOUNT NO. See attached \$45,500
ACCOUNT NAME

(C) SUMMARY OF REQUEST: For a review of the operations of the Recreation, Parks and Golf

(D) REQUESTED BY: Timothy M. Herbst, First Selectman

(E) SUPPORTING DATA: SEE ATTACHED

(F) CONCURRENCE: [] YES [] NO [] NEED ADD'L INFORMATION



TIMOTHY M. HERBST, FIRST SELECTMAN

(G) BOARD OF FINANCE ACTION:

1. APPROVED
2. RECOMMENDED TO TOWN COUNCIL ___
3. TABLED ___
4. DENIED ___
5. OTHER ___

TRANSFER
6/30/2015

TRANSFER NUMBER	ACCOUNT DESCRIPTION	ACCOUNT NUMBER	BUDGET	ACTUAL AT 6/30/2015	AVAILABLE BALANCE (OVER) UNDER	PROJECTED TO END OF YEAR	TOTAL PROJECTED ACTUAL	UNDER (OVER) BUDGET	TRANSFER	BALANCE AFTER TRANSFER
5-15-04	FROM:									
	BOF-Salaries-FT	01011400-501101	77,964.00	38,752.65	39,211.35	-	57,402.65	20,561.35	(15,166.00)	5,395.35
	Previous transfer					18,650.00				
	TO:									
	BOF-Professional services	01011400-522202	-	-	-	-	-	-	15,166.00	15,166.00
	FROM:									
	Rec-Salaries-FT	01080400-501101	184,895.00	132,382.14	52,512.86	-	155,818.14	29,076.86	(15,167.00)	13,909.86
	9 weeks left @\$2,604=\$23,436					23,436.00				
	TO:									
	Rec-Professional services	01080400-522202	-	-	-	-	-	-	15,167.00	15,167.00
	FROM:									
	Parks-Salaries-FT	01080600-501101	951,162.00	797,813.47	153,348.53	125,243.00	923,056.47	28,105.53	(15,167.00)	12,938.53
	9 weeks left \$168,243									
	Less: Amount from Contingency \$43,000									
	TO:									
	Parks-Professional services	01080600-522202	-	-	-	-	-	-	15,167.00	15,167.00
	1/3 of Parks/Rec consulting service									
	\$45,500/3=\$15,167 transfer \$15,200									
	Amount charged to Internal Auditor to be reimbursed by the Golf Enterprise fund									
	Which will be reflected in Revenue									
			1,214,021.00	968,948.26	245,072.74	167,329.00	1,136,277.26	77,743.74	-	77,743.74

TOWN OF TRUMBULL
BOARD OF FINANCE

REQUEST FOR ACTION

DATE: 14-May-15
AGENDA: 5-15-05
AMOUNT: \$45,500

2014-2015

(A) APPROPRIATION [X] FROM: ACCOUNT NO.
ACCOUNT NAME Fund Balance \$45,500

TO: ACCOUNT NO. 01011400-522202
ACCOUNT NAME BOF-Professional Services \$15,166

TO: ACCOUNT NO. 010180400-522202
ACCOUNT NAME Rec-Professional services \$15,167

TO: ACCOUNT NO. 01080600-522202
ACCOUNT NAME Parks-Professional Services \$15,167

(B) TRANSFER []

(C) SUMMARY OF REQUEST: For a review of the operations of the Recreation, Parks and Golf

(D) REQUESTED BY: Timothy M. Herbst, First Selectman

(E) SUPPORTING DATA: SEE ATTACHED

(F) CONCURRENCE: [] YES [] NO [] NEED ADD'L INFORMATION



TIMOTHY M. HERBST, FIRST SELECTMAN

(G) BOARD OF FINANCE ACTION:

1. APPROVED___
2. RECOMMENDED TO TOWN COUNCIL___
3. TABLED___
4. DENIED___
5. OTHER___

DATE OF MEETING: MAY 14, 2015

SUPPLEMENTAL APPROPRIATIONS
FISCAL YEAR 2014-2015

<u>ACTION NUMBER</u>	<u>ACCOUNT DESCRIPTION</u>	<u>ACCOUNT NUMBER</u>	<u>BALANCE BEFORE SUPPLEMENTAL</u>	<u>AMOUNT OF SUPPLEMENTAL</u>	<u>BALANCE AFTER SUPPLEMENTAL</u>
5-17-05	Supplemental appropriation From: Fund Balance			(45,500.00)	
	BOF-Professional Services	01011400-522202	0.00	15,166.00	15,166.00
	Recreation-Professional Services	01080400-522202	0.00	15,167.00	15,167.00
	Parks-Professional Services	01080600-522202	0.00	15,167.00	15,167.00
	For a review of the operations of the Recreation, Parks and Golf		<u>-</u>	<u>0.00</u>	

Timothy M. Herbst
First Selectman



Office of the First Selectman
Town Hall
5866 Main Street
Trumbull, Connecticut 06611
203-452-5005

TOWN OF TRUMBULL CONNECTICUT

Elaine Hammers, Chairwoman
Trumbull Board of Finance
Trumbull Town Hall
5866 Main Street
Trumbull, CT 06611

Re: Financial and Operational Audit of Parks and Recreation Department

May 6, 2015

Dear Chairwoman Hammers and Members of the Trumbull Board of Finance:

Please accept this letter as a request for either transfer or for supplemental appropriation in the amount of \$45,500 regarding the above captioned matter. During our recent budget process, I indicated to the Trumbull Town Council that we had identified a superior candidate to serve as our new Parks and Recreation Director. The Town of Trumbull is fortunate to have hired Stuart McCarthy. His 30 year track record as the Director of Parks and Recreation in the neighboring Town of Westport make him uniquely suited to come to Trumbull to bring the type of reform that is necessary to move the department forward.

Over the last several years, members of your body as well as the Trumbull Town Council have raised serious concerns and questions concerning special agency funds within the department. There have also been questions raised concerning fee schedules, integration of appropriate technology and staffing models. As I have indicated to the general public, your board and the Trumbull Town Council, I believe it is necessary to initiate a full financial and operational audit of our parks, recreation and golf course operations. The request for either a transfer or a supplemental appropriation is the first step to initiating this process.

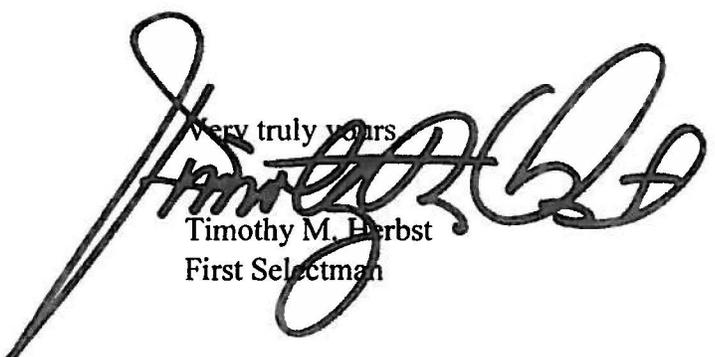
The Town of Trumbull elicited a request for proposal (RFP) for these services. We have received a response from the Matrix Group. This group specializes in the audit and review of parks and recreation systems. Mr. McCarthy and I plan on empaneling a subcommittee to interview this firm later this month, prior to his official start date of June 1, 2015. A question that will likely be raised by the Board of Finance is the following: why are we commissioning an audit when we have a new director that should execute this function? This audit will accelerate the review process and

develop recommendations that will accelerate needed reform that is long overdue. This audit is not exclusively operational; this audit will also include a detailed financial review that will examine revenues, expenditures and special agency accounts under the auspices of the Parks and Recreation Department. Perhaps most important, this audit will be making recommendations as to the method and type of technology that should be integrated into the department, making the delivery of services more efficient and affordable to the Trumbull taxpayer. This audit will also include a review of existing programs and past performance. Perhaps most significant is that this review will occur during the summer, when many seasonal employees are in place. Observing our seasonal staffing models will be critical to offering appropriate recommendations to the Town of Trumbull. Finally, this audit will also allow Mr. McCarthy the opportunity to prioritize goals, objectives and reforms. The audit could yield recommendations that require immediate priority.

The first request is for transfer. Currently, there exists an unexpended salary balance in the current Recreation Department of \$29,076. For the Internal Auditor salary account, there exists \$39,211 and in the Parks Department salary account there exists \$35,760. I am proposing utilizing the unencumbered \$29,076 from the Recreation Department, with the remaining \$16,424 to be covered in the other two salary line items referenced hereinabove. If the Board of Finance chooses to deny the transfer, my second request is for a supplemental appropriation of \$45,500.

I enclose for your review the response to RFP submitted by the Matrix Group. I look forward to discussing this request at your next meeting.

Very truly yours



Timothy M. Herbst
First Selectman



May 4, 2015

Mr. Kevin Bova
Purchasing Agent
Town of Trumbull
5866 Main Street
Trumbull, CT 06611

Dear Mr. Bova:

The Matrix Consulting Group is pleased to present this cost proposal to the Town of Trumbull to provide Consulting Services for the Parks and Recreational Activities in the Town. As is provided on the required form, we propose to conduct this study for a fixed price of **\$45,500**. The table, below, presents our detailed cost.

Task	PM / Lead Analyst	Project Analyst	Consultant	Total
1. Understanding and Profile	16	40	8	64
2. Best Practices/Survey	8	16	24	48
3. Evaluate Golf and Recreation Programs	16	16	8	40
4. Evaluate Parks Maintenance	24	0	8	32
5. Organizational Structure	8	24	8	40
6. Draft Business Plan	16	32	8	56
Total Hours	88	128	64	280
Hourly Rate	\$175	\$160	\$100	
Total Professional Fees	\$15,400	\$20,480	\$6,400	\$42,280
Project Expenses				\$3,220
TOTAL PROJECT COST				\$45,500

Again, we appreciate the opportunity to provide this proposal to the Town of Trumbull.

Matrix Consulting Group

Richard P. Brady
President

APPENDIX C

TOWN OF TRUMBULL, CONNECTICUT
REQUEST FOR QUOTATION (RFQ)
AGREED UPON CONSULTING FOR THE PARKS AND RECREATION ACTIVITIES

RE BID RFQ #6116

DUE: May 5, 2015 at 2:00 PM

PROPOSAL

To be submitted on your firm's letterhead in a separate envelope.

Firm's Name: Location of office staffing the consultant: Matrix Consulting Group, Worcester, Massachusetts

Number of Municipal professional consultant Number of Municipal consultant staff to be assigned staff at this location: to Town: 5

Connecticut Municipal consultant clients (FY engagements for municipalities with populations of 20,000 or more):

Maybe be submitted on a separate sheet.

Avon, Greenwich, Hartford, Meriden, Norwalk, Stamford

The Proposer, in compliance with this Request for Proposal, has examined the specifications and related documents and hereby proposes to provide this service in accordance with this RFP and any contract documents within the time frames set forth herein and at prices agreed to.

SCHEDULE OF PROFESSIONAL FEES AND EXPENSES

Total Cost Proposal Forty Five Thousand five hundred dollars
(Written amount)

_____ Dollars

Rates per hour for and other services to be performed outside the specified scope contained herein:

Partner: \$ 200 /hour

Manager: \$ 175 /hour

Supv. Staff: \$ 160 /hour

Other: \$ 100 /hour

Matrix Consulting Group

Company Name

201 San Antonio Circle, Suite 148, Mountain View, CA 94040

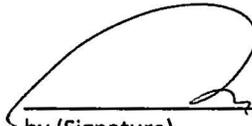
Address

Matrix Consulting Group

Company Name

05/04/2015

Date


by (Signature)

Richard Brady
Print Name

President
Title

650-858-0507/650-917-2310
Telephone/Fax

**Proposal to Provide Consulting Services for the
Parks and Recreation Activities**

TOWN OF TRUMBULL, CONNECTICUT

COPY

matrix 
consulting group

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III. TRANSMITTAL LETTER



May 4, 2015

Mr. Kevin Bova
Purchasing Agent
Town of Trumbull
5866 Main Street
Trumbull, CT 06611

Dear Mr. Bova:

The Matrix Consulting Group is pleased to present our response to the Request for Proposals to provide Consulting Services for the Parks and Recreation Activities in the Town of Trumbull. Our proposal is based on our review of the Town's Request for Proposals, our research into the Town's Parks and Recreation activities, and our recent experience analyzing these services across the country.

We have read the Town's Request for Proposal and fully understand its intent and contents. We certify that we have adequate personnel, insurance, equipment and facilities to fulfill the specific requirements. We understand that our ability to meet the criteria and provide the required services shall be judged solely by the Selection Committee. We have attached the following:

- Proposal and outlined in Section V
- Appendix A: Proposer Guarantees and Warranties
- Appendix B: Insurance
- Fixed fees (in a separate envelope)

The senior staff of the Matrix Consulting Group have extensive experience individually, and working together as a project team in this and in prior firms, for over 30 years conducting similar assessments. We believe that we are uniquely qualified to perform the requested services for the following reasons:

- Our experience analyzing municipal operations in Connecticut and elsewhere in New England and throughout the country is significant. Recently, the breadth of this experience has included organization-wide studies for the following diverse group of agencies, all of which included evaluations of parks and recreation:

Albany, NY Avon, CT Barstow, CA Brattleboro, VT Carroll County, NH Franklin Township, NJ Fort Morgan, CO Goodyear, AZ Greenbelt, MD Half Moon Bay, CA	Johnson County, KS Lathrop, CA Monroe County, MI Monrovia, CA Montpelier, VT Niles, IL Orland Park, IL Orleans, MA Portsmouth, NH Rancho Mirage, CA	Rancho Palos Verdes, CA Raymore, MO Roseville, CA San Clemente, CA Spokane, WA Sunnyvale, CA Walnut Creek, CA Waltham, MA Wayland, MA West Covina, CA
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We are currently conducting county-wide assessments in DeKalb County (GA) and Salt Lake County (UT) which include the analysis of the Parks and Recreation Departments.

- We also have significant recent analytical experience conducting dedicated studies of parks and recreation for the following clients:

Alexandria, Virginia Beverly Hills, California Boise, Idaho Campbell, California Cranford, New Jersey Davis, California	Grand Rapids, Michigan Hercules, Georgia Irvine, California Lathrop, California Los Angeles, California Salt Lake City, Utah	San Bernardino, California San Clemente, California San Luis Obispo, California Santa Barbara, California Southlake, Texas Tiburon, California
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We would like to note that we are also currently completing a study of the Elmhurst (IL) Park District.

- We have proposed an extremely experienced and senior team of consultants for this engagement, including not only the analysts who have performed all of the studies referenced but also a former Director, Council member and professor in parks and recreation.

Our approach to conducting organizational evaluations and assessments is based on detailed data collection and analysis, intensive input, and extensive client interaction. We partner with our clients in developing a detailed scope of work and timeframe that are tailored to their specific needs. Our approach to conducting this study is summarized by:

- Developing an understanding of the issues in Parks and Recreation services and developing a descriptive profile of operations, organization and finances.
- Comparing operations and practices to those of other, similar, municipalities and to "Best Management Practices".
- Conducting operational analyses of operations, management, staffing, finances, performance management, and the impact of a minimum wage increase.

- Evaluating departmental organizational structures.
- Developing a draft and final business plan.

We understand and agree that all information contained in, attached to, or required by the Request for Proposal shall be public record upon delivery to the Town of Trumbull.

We appreciate the opportunity to provide this proposal. If you have any questions or require additional information, please contact me at 650-858-0507 or by email at rbrady@matrixcg.net.



Matrix Consulting Group

Richard Brady
President

IV. DETAILED PROPOSAL

IV. DETAILED PROPOSAL

This section of our proposal provides our understanding of the project as well as our qualifications, and a detailed task plan for its completion. First, however, we would like to provide some information about our firm that we believe is important, and distinguishes the Matrix Consulting Group from other consulting firms.

1. INTRODUCTION TO THE MATRIX CONSULTING GROUP

The Matrix Consulting Group has extensive experience conducting analyses of parks and recreation services. Our objective for every engagement is to deliver practical solutions while enriching the skill set and knowledge base of our clients' management teams in providing excellent customer service. Our firm and our approach to providing consulting services to local governments in general, and to parks, golf and recreation agencies in particular, can be summarized by the following:

- We were founded in 2002 and are domestically incorporated in California and are authorized to provide consulting services in Connecticut.
- The principals and senior staff of our firm have worked together in this and other consulting organizations *as one team* for between 15 and 40 years. Principals of the firm manage *and* serve as analysts on each of our projects.
- We provide management studies and financial services only to local government.
- Our experience encompasses over 175 studies of parks and recreation functions in Connecticut as well as elsewhere in the New England and across the country. Much more detail about this experience is provided in the next section of this proposal.
- The specific team members proposed in this submittal have extensive experience in general operational and staffing studies of parks and recreation functions, including golf services, and also specific experience in financial analysis, analysis of competitive markets for recreational services, strategic planning, and other facets of operations.
- Neither our firm nor any of its staff have any form of conflict of interest which could interfere with conduct of this study.
- Our firm is committed to the continuing education of its staff and the firm supports it with time off (3 days per year) and tuition reimbursement. The firm also has a 3 day annual meeting which is devoted to skills enhancement. Finally, all staff attend at least one professional conference each year (e.g., ICMA).

- As a management consulting firm, as opposed to an accounting firm, we are not required to have external quality control. We have extensive internal quality control measures including project manager oversight, annual performance reviews including product reviews as well as the training described above. In the final analysis, we have never had a contract cancelled because of the quality of our work.
- Finally, we have submitted our last two financial statements. The firm is profitable every year and does so with competitive compensation, including a full fringe benefit program.

The cornerstone of our philosophy in conducting organization and management studies is summarized in the points below.

- A principal of the firm is always involved in every aspect of each of our studies. This includes interviews of staff, data collection, report writing, client meetings and public presentations.
- We have taken particular care to assemble a senior team of professionals to conduct this study. Our team has significant Parks and Recreation experience – one of our team members, Ginny Jaquith, was a former Parks and Recreation Director, City Council member and lectured on parks and recreation at the university level.
- All of our team members are Matrix Consulting Group staff, we propose no subcontractors. The use of subcontractors increases the risk that projects are of inconsistent quality and depth; customer service can also suffer.
- We approach our projects by gaining a firm grounding in formal and fact-based analytical methodologies.
- Our projects are characterized by extensive input and interaction between the consultants and our clients' staff, management and policy makers.
- We recognize that successfully serving clients requires more than "giving them the right answers." In addition, we provide clients with practical plans for change.

This philosophy has provided our clients with valuable assistance in enhancing service delivery, and resulted in high levels of implementation of our recommendations.

2. STATEMENT OF QUALIFICATIONS

This section of our proposal provides information regarding the firm's experience and qualifications in conducting Parks and Recreation consulting engagements. Please note that the experience listed is that of the specific consultants proposed for this project.

(1) Project Staff

The consultants proposed for this engagement have broad experience in analyzing Parks and Recreation functions, and specifically in management structure and staffing analyses, use of technology, service level definition, insourcing and outsourcing, and others. This project would be directed by the firm's Senior Manager in our New England office. In addition, one of our key proposed assigned staff resides in Connecticut (in nearby Easton). The organization of the team is shown below.



We commit these staff for the duration of the assignment, if selected.

A summary of their experience is provided below, with more extensive resumes provided as an appendix to this proposal.

ROBIN HALEY is a Senior Manager with the Matrix Consulting Group and brings over 25 years of consulting experience at the local and state level. His primary areas of work include analyses of parks and recreation, public works, utilities, financial and management audits, organization and management consulting, productivity and benchmarking studies. Mr. Haley has consulted in numerous functional areas in government including parks and recreation, public works, public safety, community development, planning, human and social services, finance, human resources, organizational development, as well as administrative and support services. Mr. Haley has conducted over 50 parks and recreational, engineering, public works and utility system operational reviews. He received his B.S. degree from the Georgia Institute of Technology and his M.B.A. from Georgia State University. ***Mr. Haley will serve as the Project Manager on this engagement.***

ALAN PENNINGTON is a Vice President with the Matrix Consulting Group with over 5 years of local government management consulting experience. Additionally, he has over 15 years of experience as a top manager in the public sector in Illinois and Maine before joining Matrix. These top management positions included Assistant City Manager,

Assistant Human Resources Director and Labor Relations Manager. His experience conducting Administrative Services (Human Resources, Procurement, Finance, etc.) evaluations and organizational restructuring includes projects for Avon (CT), Charlotte (NC), Department of Conservations (State of Missouri), Highland Park (IL), Hilton Head Island (SC), City of Los Angeles (CA), Imperial Irrigation District, Johnson County (KS), Marshall University (WV), Peoria County (IL), Reno-Washoe County (NV), Salt Lake City (UT), Springfield (MA), Washington State Ferries, and West Virginia University. Mr. Pennington has taught collective bargaining and economics at Bradley University and Eureka College. Mr. Pennington has a BA (Public Management) and M.P.A. from the University of Maine. ***Mr. Pennington will serve as a Project Analyst on this engagement.***

GINNY JAQUITH is a Senior Manager with the Matrix Consulting Group, with over 35 years of experience in the public sector as a consultant to local government and as a professor and department chair in the Recreation, Parks and Tourism Department at San Francisco State University. Ms. Jaquith has also previously served for over 17 years as the Department Director for the Parks, Beaches and Recreation Department in Pacifica, California. Ms. Jaquith has conducted over 30 management audits for governmental and non-profit organizations including for the following clients: Beverly Hills (CA), Los Angeles County (CA), Mountain View (CA), Orange (CA), Palo Alto (CA), Reno (NV), San Francisco (CA), Salt Lake City (UT), and Washoe County (NV). Ms. Jaquith has a B.A. from San Jose State University, a M.S. degree from San Francisco State University, and a doctoral degree from the University of San Francisco. She is based in our Mountain View headquarters' office. ***Ms. Jaquith will function as a Project Analyst on this engagement.***

JOCELYN MATHIASSEN is a Manager with Matrix Consulting Group and brings over 15 years of consulting and public sector experience at the local and state levels. She is based in Easton (CT). Her primary work areas include streamlining municipal operations to enhance customer service and efficiencies, often in areas that cross departmental lines. Most recently she served as Director of Permitting and Land Use for the city of Milford, Connecticut where she was widely credited with transforming a troubled department into a model of efficiency and customer service. Ms. Mathiasen has led projects in numerous functional areas of government including land use, planning, permitting, information technology systems, human resources, and administrative and support services. She received a Master of Public Policy from the Kennedy School of Government and Harvard University and a BA in Government from Oberlin College. ***Ms. Mathiasen would provide project analyst support on this engagement.***

DAVID LEE BRANCH – Mr. Branch is a Consultant with the Matrix Consulting Group. Mr. Branch is assigned to support our senior staff in all subject areas but focuses on supporting staff in our general management consulting practice. Prior to joining the Matrix Consulting Group he completed internships with the City of Riverside, CA Planning Division and the public policy department of the Los Angeles Area Chamber of Commerce. During his time with the firm, he has worked in a supporting role to senior project analysts on numerous projects. He is an alumnus of the 2011 Teach For America St. Louis Corps. Mr. Branch received his BS in Public Policy, Management,

and Planning from USC and his Masters of Education from University of Missouri St. Louis. **Mr. Branch will provide support to the Project Analysts on this engagement.**

(2) Relevant Experience for the Matrix Consulting Group

Our relevant experience encompasses a wide variety of organization-wide studies that included the analysis of parks and recreation functions. We have conducted over 75 of these organization-wide studies. The following table provides a sampling of our more recent studies (with New England clients **bolded**).

Albany, New York Avon, Connecticut Barstow, California Brattleboro, Vermont Deltona, Florida Fort Morgan, Colorado Goodyear, Arizona Greenbelt, Maryland Hanford, California Irvine, California Johnson County, Kansas	Lathrop, California Monroe County, Michigan Monrovia, California Montpelier, Vermont North Miami Beach, Florida Orland Park, Illinois Orleans, Massachusetts Palo Alto, California Poway, California Prescott Valley, Arizona Rancho Mirage, California	Rancho Palos Verdes, CA Raymore, Missouri Roseville, California San Clemente, California San Rafael, California Spokane, Washington Sunnyvale, California Venice, Florida Walnut Creek, California Waltham, Massachusetts Wayland, Massachusetts
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We are currently completing Countywide studies for Salt Lake County (UT) and DeKalb County (GA) which include their Parks and Recreation Departments.

We have also conducted over 100 studies of Parks and Recreation departments. In the past five years. Our engagements have included the following:

Alexandria, Virginia Beverly Hills, California Boise, Idaho Campbell, California Cranford, New Jersey Davis, California	Grand Rapids, Michigan Hercules, Georgia Irvine, California Lathrop, California Los Angeles, California Salt Lake City, Utah	San Bernardino, California San Clemente, California San Luis Obispo, California Santa Barbara, California Southlake, Texas Tiburon, California
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It should be noted that we recently completed a study of Salt Lake City's Golf Fund and are currently conducting a study of the Elmhurst Park District (IL).

(3) References

Listed below are examples of studies relevant to this project, which the firm has recently conducted. In the next section we provide additional descriptions as references. We provide these examples to demonstrate the depth of our experience and diversity of assignments and clients. We can provide reference information for any of these projects if the Town desires.

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Client	Project Summary	Reference
<p>Montpelier, Vermont Organizational Review</p>	<p>As part of a Citywide management and staffing study the project team analyzed parks and recreation functions. Key recommendations, which were implemented, include the consolidation of the Parks and Trees Department under the Public Works Department to capitalize on the opportunity to share equipment and personnel resources; in addition, develop a Tree Master Plan, including a tree inventory.</p>	<p>William Fraser City Manager 802.223.9502</p>
<p>Grand Rapids, Michigan Parks and Recreation Business Plan</p>	<p>The firm developed a Business Plan for Parks and Recreation. Study tasks included an overall efficiency and effectiveness assessment of operational practices, staffing requirements, services to be provided and the associated service levels. The organization was operating under a severe fiscal and staffing limitation that greatly impacted services provided and covered a minimal service level. The business plan provided a financial analysis with a longer-term goal toward self-sufficiency by aligning fiscal resources and service levels.</p>	<p>James Hurt, Director Public Services 616.456.3312</p>
<p>San Bernardino, California Management Study of the Parks and Recreation Department</p>	<p>In this study, the project team evaluated service levels, workload, output, and staffing for all divisions and program areas in terms of necessity, efficiency, staffing, funding, hours of service versus demand for service, responsiveness to resident needs, cost recovery, and organizational structure. In all, there were 153 recommendations to re-invent the Department. Principal recommendations implemented included changes in scheduling and staff allocations, eliminating some programs while increasing the utilization of community centers, and a commitment to improve capital improvements to the City's parks.</p>	<p>Kevin Hawkins Former Parks & Rec Director; Now Community Services Director in Temecula, California. 951.694.6480</p>

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Client	Project Summary	Reference
Sunnyvale, California Serial Management Studies covering all governmental functions	In a series of management studies, the project team completed evaluations of most City operations. Each study included an evaluation of staffing and operational practices. In the Parks and Recreation and Libraries areas the project team recommended a consolidation of these departments because of impending management vacancies and the need to synergize the programs and services. There were also several recommendations to improve parks maintenance.	Gary Luebbers Former City Manager, Now retired 435.668.6066
Salt Lake City, Utah Analysis of the Golf Fund	In this recently-completed study, the Matrix project team was requested to analyze the financial trends of the City's eight golf courses in order to make recommendations to the City Council regarding the future viability of the enterprise Golf Fund. The project team analyzed financial and demographic trends related to rounds played, the capital investments and needs of the Fund, and alternative forms of management. Recommendations included the elimination of two unprofitable golf courses, the issuance of an RFP to investigate the financial feasibility of privatizing management of remaining courses, and the prioritization of capital expenditures on courses that had been neglected over a period of years.	Cindy Gust-Jenson Executive Director of the City Council 801.535.7600

3. PROJECT UNDERSTANDING AND PROPOSED APPROACH

The Matrix Consulting Group approaches each project under the premise that we cannot deliver a customized product unless we understand the uniqueness of our client, and the background of the issues and circumstances that led to the issuance of a request for proposals for services.

(1) Our Understanding of the Project Scope of Work

We understand that the Town desires for the selected consultant to analyze, at a minimum, the following facets of the Town's Parks and Recreation activities:

- **Conduct an operational, process and financial review of all parks, recreation and golf course activities.** The Town provides a wide array of services, and also possesses over 1,600 acres of parkland for use by its 34,000 residents, which equates to the highest level of park and open space per resident of any Connecticut municipality. In addition, the Town provides both an 18-hole

and a nine-hole golf course. Our project team will analyze the recreational services to ensure that offerings are aligned with resident needs, and that parklands are managed and maintained in accordance with best practices, and are being provided in the most efficient and effective manner. This review will not only assess the efficiency and effectiveness of parks, recreational and golf activities, but our project team will also ensure that fees are covering the costs of service provision, and that appropriate financial controls are exercised in the delivery of these services.

- **Assess technology in the delivery of parks and recreational services.** The use of technology in the delivery of municipal services is no longer exceptional, but rather is expected by residents and other users of parks and recreational services. These uses have, for many years, included the implementation of work management systems that record, analyze and report the labor, materials and equipment used in the provision of internal and contractual services, but now also include on-line registration services for recreational programs, mobile applications for registration and tee-times, GPS technology to ensure that golf course pace of play is proceeding appropriately, as well as many others. Our project team will assess the use of technology in the Town departments engaged in providing parks and recreational activities, and will identify gaps in their provision, as well as costs for implementing any needed technological improvements that will enhance the experiences of users of the Town's services.
- **Assess roles and responsibilities under former and proposed organizational charts, and assess roles and responsibilities of full time and seasonal employees.** Our review of the Town's meeting minutes indicates that there has been discussion regarding the appropriate organizational structure of the parks and recreational services. Our project team will review the roles and responsibilities of managerial, supervisory and line staff, whether full of part time, and determine the most appropriate organizational structure, and align the duties and responsibilities of staff with this organizational structure. There are many important facets of optimal organizational design, including the need to enhance communication and coordination, eliminate duplication of services, maximize the skills of staff, optimize spans of control and others. Our project team has extensive experience in developing alternatives for consideration in optimal organizational design, and in defining the advantages and disadvantages of each for discussion with the Town.
- **Assess organizational charts in municipalities of similar size and location.** An important tenet in all of our consulting engagements is that each of our clients is unique in many respects, with unique sets of circumstances that have led to their current situations, including their staffing levels, their targeted levels of service, their approaches to management and planning, and even their organizational structures. However, it is always valuable to compare operations and organizational facets to those of similar, and successful, agencies. Our project team will work with the Town of Trumbull to identify those similar

organizations to which its parks and recreational services can be compared in order to identify elements of those agencies that can be incorporated into the Town's organizational structure, its staffing, its use of technology, its management and planning, as well as other facets of operations, while retaining those elements of operations that make Trumbull unique and successful.

- **Assess fee schedules, revenues and expenditures.** The First Selectman, in his State of the Town address in March, indicated the need to properly account for revenues and expenditures. There are varying approaches to the development of fee schedules, however it is important that the Town carefully consider its philosophy regarding cost recovery targets in establishing these fees. For certain recreational offerings such as for golf and many adult athletic programs, full cost recovery may be appropriate, with a somewhat lesser targeted recovery rate for youth, elderly and special population programs. Beyond these decisions, the Town must consider what constitutes "full cost recovery", and how this is calculated. Another dimension to the determination of appropriate fee structures, however, is in the comparison of these fees to providers of the same programs within the service area. As part of this engagement, our project team will compare the Trumbull's recreational service fee schedules to those of similar, local, recreational service providers, and will discuss the differences with the Town's project managers. Our project team will also assess the sufficiency of the revenues the departments receive, and compare these to the expenditures to determine the sufficiency of cost recovery. This analysis will form the basis of much of our project activities, and will assist in forming many of our recommendations relating to staffing and operations.
- **Review existing contracts with field maintenance vendors and other ancillary contracts.** Contracted maintenance service providers can be significant partners in ensuring that fields, natural areas, landscapes, trees and other assets are maintained properly and in accordance with schedules. Further, they can supplement internal repair crews engaged in irrigation system maintenance, facility repairs, custodial services, and perhaps others. The issuance of maintenance contracts, however, requires that these contracts be written so as to ensure delivery of adequate service levels, and that a significant effort be made on the part of internal staff to oversee and manage these contracts to ensure that services are delivered in accordance with contractual terms.

The First Selectman has outlined several goals and objective for parks and recreational services, and clearly recognizes the importance of these services in contributing to a thriving community. These objectives include a commitment to increasing the program offerings to residents, to enhancing the health of residents, and to accounting for all revenues and expenses of the parks and recreational services.

The Matrix project team will conduct operational, managerial, financial and organizational analyses of all elements of current operations of the parks and

recreational services provided by the Town of Trumbull, and will also conduct a comparative analysis that will identify trends in service supply and demand, key strengths upon which the Town should build, and the competitive placement of its programs and services compared to the market within which it competes for participants. All of the above elements will be assimilated into the development of a business plan for the future of parks and recreational services in the Town of Trumbull.

In the following pages, we provide our approach to conducting the study of parks and recreational services in Trumbull.

(2) Our Approach to Providing Consulting Services.

We believe that several aspects of our overall approach should be stressed. These aspects are described in the paragraphs below.

(2.1) Project Management

One critical success factor in conducting a project of this nature in an efficient, timely, and effective manner, is project management. The Matrix Consulting Group utilizes project management approaches that ensure that (a) efficiencies can be achieved in the gathering and analysis of information; (b) disruption to the day-to-day operations of the Town can be minimized; and (c) later tasks can build upon the results of earlier ones so that backtracking and redundant work effort (and unnecessary costs to the Town and the departments) can be avoided.

(2.2) Information Gathering

Equally important to the success of the project are the methods that we will use to collect, analyze, and present information in order to formulate findings and develop and assure acceptance of recommendations. The Matrix Consulting Group has developed, and fine-tuned over the years, a number of information gathering tools and techniques. These tools enable us to gather information efficiently and quickly. The tools that we will employ in this project include:

- **Documentation of data.** We specify the types of documentary material (e.g., organization charts, policies and procedures, financial statements, budgets, fee structures, workload data, participant data, etc.) we will seek in order to evaluate parks and recreation.
- **Interviews.** Employee interviews are a staple of our consulting approach. We will utilize interviews to gain a perspective regarding such issues as:
 - Staffing and responsibilities of the employees of the Town involved in providing parks and recreation services;
 - Current workload and workload trends;

- Existing technologies utilized;
- Marketing efforts undertaken to inform the public of available services and programs;
- Approaches utilized to assess customer satisfaction;
- Basic service level goals, objectives, performance measures, and business plans established to guide individual departmental activities;
- Daily work practices.

As the next section demonstrates, our attention to detail also carries through to our analysis.

(2.3) Data Analysis

The Matrix Consulting Group uses a number of proven analytical methodologies that we have developed in areas such as those presented in the following paragraphs.

- **Benchmarking.** Benchmarking of services to assess organizational efficiency and effectiveness has been increasingly utilized in the public sector to compare organizations in terms of "best practices". This approach will be useful in this study to assess the current approaches to delivery of services. This assessment also clearly identifies current strengths, weaknesses and opportunities for improvements.
- **Performance Measurement.** The Matrix Consulting Group employs performance measurement techniques in every management study we conduct. This will enable us to fully understand the current levels of service provided to the Town's customers. We identify key performance measures that can be utilized by the organization in evaluating performance in the future.
- **Analysis of Service, Staffing and Cost Issues in Trumbull.** Comparative efforts and performance metrics are valuable analytical efforts. However, the Town of Trumbull and its recreational services are unique in some respects. As a result, analysis of how effectively and efficiently the Town's recreational services meet your own standards is critical.

These approaches will serve as critical components in conducting a thorough assessment of the Department's operations.

(2.4) An Inclusive Stakeholder Oriented Approach

Employee involvement and close contact with the Town's project manager are

critical components of the management study. If selected to conduct this study, we propose the following approaches to ensure that staff involvement is maximized over the course of the project.

- We will interview a significant number of employees, at all levels of the Department. These interviews are part of the fact finding as well as the issues identification processes.
- In any analysis of recreational services the views of customers, citizens who utilize these services, is critical. We propose to develop this input through focus group meetings and an on line / anonymous citizen survey.
- We will prepare reports periodically throughout the study to report progress to date, problems or obstacles encountered, and planned project activities over the next several weeks. These will be provided to the Town and discussed as necessary to maintain progress on the study.
- Our studies need to be interactive so that the project team does not work in a vacuum. It is important throughout the process to discuss progress, review interim documents, and discuss alternatives as they are developed. We understand that for this engagement, the Finance Department will be our primary point of contact, and will coordinate the assistance that the Town provides during the course of the project.

The next section describes in more detail how our firm would conduct this analysis of Parks and Recreation activities for the Town of Trumbull.

(3) Parks And Recreation Activities Assessment Task Plan

The following are proposed tasks for conducting an analysis of the Parks and Recreation activities in the Town of Trumbull.

Task 1 Develop an Understanding of Current Parks and Recreation Issues and Develop a Detailed Profile of Existing Operations.

To evaluate the organization and operations of Parks and Recreation activities in Trumbull, we need to develop an understanding of the key issues impacting and shaping service requirements today. To develop this perspective, we will conduct interviews with the First Selectman, Town Council members, the Parks and Recreation Commission, key community stakeholders. These interviews will focus on exploring issues and attitudes regarding the adequacy of service levels, and perceived gaps in existing levels of service; the impacts of any organizational and staffing changes which have been made in the past several years; goals and objectives with regard to the delivery of services in each of the parks and recreation functions; current approaches to partnership development with other governmental agencies, Not-For-Profit (NFP)

organizations and private service providers; adequacy of management systems and technology; and outsourcing and insourcing philosophy of the departments.

Next we will develop a detailed description of the parks and recreational services provided by the departments. Our focus will be on how services are delivered, staffed, and managed, as well as the costs associated with the delivery of those services. The development of this detailed description will be based on interviews as well as on the collection of operating information and data such as the current organization of the services; the costs of activities, as reported in the budget and any available activity-based-costing reports; documentation of all key operations, including service scope, deployment of staff, workload data, locations of fields, facilities courses, etc.; basic service levels and extent of contracted services; documentation of the current technology in use in the Parks, Recreation and Golf departments; and documentation of management systems available to support department operations, including financial reporting, scheduling and registration systems, performance monitoring systems, etc.:

This profile will be circulated among staff for comment to ensure the accuracy of our understanding. The profile will then be presented to the Town. Once completed and reviewed, the profile information will provide the basis for analysis conducted and completed in subsequent study tasks.

Task Result: The deliverable for this task will be a descriptive profile.

Task 2 Compare Operations and Practices to Other Municipalities and to “Best Management Practices”.

The purpose of this task is to evaluate maintenance, programming and recreational services in the context of similar organizations and to best management practices in the profession.

Our project team will propose ten to twelve municipalities in Connecticut and New England that are similar in terms of size, similarity of service provision and demographics, and will discuss the relevance of each with the Town. The Town may wish to accept these or propose others, and our project team will administer the survey to the chosen number of municipalities to assess the survey participants' forms of organization, fee structures, staffing levels, expenditure levels, uses of technology, use of maintenance contracts, as well as other facets of operation.

We would also compare the parks and recreational services in the Town to 'best practices'. This approach is a useful adjunct to a comparative survey – one compares an agency to peers, the other to the best that an agency can be. When conducting the best management practices assessment, each operational area would be assessed against unique management practices. The best practices utilized for comparison in this task would be based upon our accumulated knowledge and experience with efficient and effective organizations across the country, as well as through accepted industry

benchmarks from such organizations as NRPA, and others. This benchmarking would focus both on quantitative and qualitative measures. Representative examples include.

Examples of Best Management Practices
The Town coordinates the delivery of its program and services with other public and private agencies to avoid duplication.
The Town utilizes Internet-based class registration software. Customers can register for recreation classes on-line.
The Town utilizes joint use agreements with other entities, such as the local school department, that allows the use of outdoor facilities such as sports fields, and the use of indoor facilities such as gymnasiums.
There is a policy or a proactive approach for soliciting external funding (e.g., donations, sponsorships, in-kind contributions, etc.) to support recreation programs.
There is a consolidated, consistent effort to effectively market recreation programs and services to potential customers and clients in the community.
The Town utilizes an ongoing proactive formal evaluation system to seek customer input and feedback for each program or class.

Deliverable: The product of this task would be a diagnostic assessment of the strengths and improvement opportunities in Parks, Recreation and Golf Course services.

Task 3 Evaluate Existing Recreation Programs and Facilities.

The purpose of this task is to evaluate the efficiency and responsiveness of the Department's recreational services. Completion of this task will involve the following steps:

<p>Profile the existing recreation programs provided by the Town's two golf courses and its Recreation Department over a 12-month period to include:</p> <ul style="list-style-type: none"> • The types of programs and services provided. • Level of participation in each program by season. • Rounds played at the two courses • The facility used or where recreational programs are provided. • Conditions of the courses, pro shops, lounges, food service areas, driving ranges, restrooms and other amenities at the golf courses. • The cost of recreational programs, including the fees per participant. • Levels of greens fees in comparison to competitors, as well as costs of passes, loyalty programs, etc. at the golf courses • The staff or contractor providing each recreational program • Other community agencies participating in service delivery.
<p>Compare the extent of recreation and community service programs offered by the Department against programs typically provided by other entities similar to the Town of Trumbull.</p>
<p>Identify gaps in programming which appear to exist.</p>

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Review the duties of all full time and seasonal employees to determine whether duties and/or shifts can be combined, whether duties that are performed are in accordance with needs and are also in accordance with duties as described in job descriptions.
Assess the operational costs at the golf course, including fleet maintenance and replacement, irrigation costs, course maintenance, etc.
Review and evaluate the expenditures and revenues of all special agency funds.
Document the extent to which the Town has conducted a needs assessment to: (1) determine community interest and recreation service expansion, and (2) determine which entity is best able to provide such services. Document the extent to which the Town has assessed the community's desires for retention or expansion of golf services compared to other recreational activities.
Evaluate existing recreation facilities and determine utilization levels, facility strengths and weaknesses, future capital improvement plans and needs, and the adequacy of maintenance.
Evaluate the level of participation for each recreation and community service program to determine the extent of demand. Document if some programs are no longer available.
Document the extent to which programs and services provided by the Department duplicate those provided by profit or non-profit organizations in the local community.
Review contracts with contract service providers and sports leagues and other system users.
Develop an understanding of the approaches used to obtain and use customer input to improve existing services or create new programs or services in the Town.
Document the use of technology to monitor program performance and utilization.
Document any additional facilities or different types of facilities that should be planned for in the Town and included in the CIP. Has maximum use been made of existing public facilities? Are there other cooperative relationships with other agencies which could be created?

This task, then, will include detailed analysis of the following:

- Needed adjustments in the types of recreation and community service programs provided by the Town to meet current and projected future demands.
- Detailed assessment of existing recreational services provided either through the General Fund or by Enterprise Funds.
- Assessment of the management of recreational and golf services, including programs, staff and facility utilization.
- Recommended adjustments in the provision of the services focusing on the elimination of duplication between the Parks and Recreation Department, non-profit agencies and for profit agencies.

The product of the task will be an evaluation of the adequacy of recreational and golf services, opportunities to better meet community needs in recreational services, the

utilization of staff and facilities, and use of community input to continuously improve service delivery. An interim report would be generated which documents current practices and opportunities for improvement, reviewed with the Town.

Task Result: The product of this task would be an interim discussion document that outlines the evaluation of recreational and golf services.

Task 4 Evaluate Parks Maintenance Operations.

In this task, the project team would conduct a comprehensive assessment of maintenance operations, staff productivity and management. The initial step in evaluating the efficiency and effectiveness of maintenance operations will be directed at assessing the adequacy of the service levels for the Town's parks, open space, facilities, technology and fleet at an overall level. For example:

Document the level of the service and maintenance standards utilized by the Department in maintaining the park system and open space. This will focus on key tasks such as mowing, edging, fertilizing, policing, weed control, and the like. It will identify various activities that occur given the seasonal nature of maintenance tasks performed by the Department.
Select a sample of Town parks, inspect and evaluate the quality of maintenance. This will involve the development maintenance standards defining the quality of maintenance to be provided. These standards would cover such features as the height of the turf, extent of litter, extent of barren/brown spots in the turf, extent of weeds and the like.
Identify the extent of backlogs for corrective repairs to park furniture, bathrooms, requests made by the public for trimming of trees, etc. Document the length of time required to resolve backlogs.
Identify whether existing service levels are sufficient to maintain the park and open space system and prevent its deterioration.
Determine the extent to which a maintenance management system exists to plan, schedule, and prioritize maintenance activities. We will also determine the extent of documentation regarding maintenance plans and standards.
Document the existence of an asset management plan that identifies the locations, ages and life cycles of assets, the documentation of maintenance of these assets, the planned replacement, the inspections, etc.
Document the existence of any partnership agreements to jointly provide maintenance management services with private, non profit or other public entities.
Review the duties of all full time and seasonal employees involved in maintenance activities to determine whether duties can be combined, whether duties that are performed are in accordance with needs and are also in accordance with duties as described in job descriptions.
Document the level of the service and the maintenance standards utilized by the Department in maintaining and repairing the Department's facilities, fleet and equipment.
What are maintenance crew sizes? How is work planned, scheduled and evaluated by supervisors? Are there other types of equipment which could impact performance and productivity?

Analysis of these components will result in the development of detailed recommendations regarding:

- Specific staffing required given acceptable utilization levels.
- Specific positions that can be eliminated or adjusted if reasonable utilization levels are obtained.
- Specific steps that need to be taken to reach reasonable utilization levels include:
 - Specific changes in existing work methods and practices.
 - Adjustments in existing planning and scheduling techniques.
 - Where appropriate, specific steps that could be taken to adjust existing operating systems with positive impact on staff utilization levels and staffing requirements.
 - Opportunities to outsource selected maintenance services presently provided by the Department and the potential cost impact of contracting out these services.
- Opportunities to increase utilization rates or reduce the number of vehicles within the fleet.

Task Result: An interim report would be generated which documents current recreational practices and opportunities for improvement now and in the future. It would be reviewed with the Town.

Task 5 Evaluate the Adequacy of the Existing Organization and Management of Parks and Recreation.

The purpose of this task is to evaluate the efficiency and responsiveness of the plan of management and organization of parks and recreational activities. First of all, to analyze the appropriateness of existing organizational structure, we will address such factors as:

Is the organization too "tiered" or too "flat" from the management staffing perspective?
Are spans of control too broad or too limited?
Does the current plan of management organization staffing provide for adequate communication and coordination between and among operating units?
Are there any overlapping or duplication of functions?

Are there missing services or gaps in staff functions?
Does the plan of organization provide clear lines of authority and responsibility?
Are managerial and supervisory personnel effectively utilized?
Is the balance of part-time and full-time staff appropriate?
Does the community advisory board structure provide adequate oversight? Are there alternative structures that could better serve the Town?

Then, the consulting team will identify and evaluate positive and negative features of major management systems within the departments to manage resources. The systems to be analyzed will include.

Management procedures and policies.
Organizational performance planning and measurement of efficiency and effectiveness.
Needs assessment devices and techniques to develop and plan recreation services and programs.
Program evaluation and customer satisfaction survey approaches.
Technology utilization and identified technology needs for the future.
Financial accounting and reporting.

Task Result: The products of this task would be an assessment of current plan of organization for Parks and Recreation as well as the effectiveness of management of these functions. This interim report would be reviewed with staff and the Town.

Task 6 Prepare a Draft and Final Business Plan and Implementation Plan for Parks and Recreation Activities.

Once the work tasks noted above have been completed, our analysis, findings, and conclusions will be documented and reviewed with the Stakeholder committee and staff in the Town's Parks and Recreation activities. The draft and final business plans will contain the following elements:

- An executive summary that summarizes all of our recommendations, along with a timeline for implementation and any cost impacts.
- A final version of the descriptive information regarding Parks and Recreation activities in the Town that shows key operating characteristics for each business element and revenue source.
- A final version of the results of the comparative survey of Towns providing similar recreational and maintenance services.

- A final version of the 'best management practices' assessment.
- Detailed analysis of, and justification for, each identified improvement opportunity relating to philosophies and commitments, staffing required given these commitments, managerial and operational practices for service delivery.
- Recommended staffing allocations, by number and position, for each function, as well as financial and performance indicators. This will contain recommended organizational charts that describe any changes to the structure.
- An implementation plan for each improvement opportunity to ensure that there are accountability mechanisms in place to ensure that responsibility is allocated, timing is planned, and results are demonstrated. This will also include recommendations for aligning financial policies and operational procedures with Town standards.

Task Result: The product of this task would be the draft and final reports which would be submitted to the Director of Finance, and reviewed with the Town. Once finalized, the report would be presented to the public in a meeting or workshop of the Town Council and the Parks and Recreation Board.

4. COMPLETION TIMELINE

The table, which follows, presents the proposed timeline for completing the tasks identified in our task plan. We have proposed a plan that would result in the delivery of the draft business plan within a twelve week period. Assuming a June 1 award and June 15 start date, our proposed delivery of the draft final report is on September 4.

Task	Weeks After Project Commencement												
	1	2	3	4	5	6	7	8	9	10	11	12	
1. Understanding and Profile	█												
2. Best Practices/Survey		█											
3. Evaluate Golf and Rec Programs			█										
4. Evaluate Parks Maintenance				█									
5. Organizational Structure					█								
6. Draft Business Plan						█							

V. GUARANTEES AND WARRANTIES

APPENDIX A

TOWN OF TRUMBULL, CONNECTICUT
REQUEST FOR QUOTATION (RFQ)
AGREED UPON CONSULTING FOR THE PARKS AND RECREATION ACTIVITIES

RE BID RFQ #6116

DUE: May 5, 2015 at 2:00 PM

PROPOSER GUARANTEES AND WARRANTIES

Proposer Guarantees

The proposer certifies it can and will provide and make available, at a minimum, all services set forth in Section 4, Nature of Services Required.

Proposer Warranties

1. Proposer warrants that it is willing and able to comply with State of Connecticut laws with respect to foreign (non-state of Connecticut) corporations.
2. Proposer warrants that it is willing and able to obtain an errors and omissions insurance policy providing a prudent amount of coverage for the willful or negligent acts, or omissions of any officers, employees or agents thereof.
3. Proposer warrants that it will not delegate or subcontract its responsibilities under an agreement without the express prior written permission of the Town of Trumbull.
4. Proposer warrants that all information provided by it in connection with this proposal is true and accurate.

Matrix Consulting Group

Company Name

201 San Antonio Circle, Suite 148, Mountain View, CA 94040

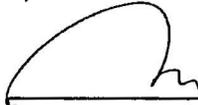
Address

Matrix Consulting Group

Company Name

05/04/2015

Date



by (Signature)

Richard Brady

Print Name

President

Title

650-858-0507/650-917-2310

Telephone/Fax

**APPENDIX A – RESUMES OF THE PROJECT
TEAM**

ROBIN G. HALEY SENIOR MANAGER, MATRIX CONSULTING GROUP	
<p>Background: Mr. Haley has over 25 years of public management consulting experience, with a primary emphasis on public works related services. This includes a diverse area of experience that includes utilities, streets and highways, solid waste and recycling, rights-of-way maintenance, parks and recreation, fleet management, facilities management, and customer service management systems. Additionally, Mr. Haley has 10 years of experience as a financial analyst in the transportation and defense contracting industries, with responsibility for budgeting and budget oversight, cost estimation and customer service.</p>	
<p>Agency-Wide Studies: Managed and conducted studies of city and county organizations. Scopes of work included analyses of organizational structure, management and planning, staffing, performance measurement and management, operational requirements, policies and procedures</p>	
Alexandria, Louisiana Allegan County, Michigan Augusta-Richmond, Georgia Beaufort County, South Carolina Brattleboro, Vermont Brunswick, Georgia Charleston County, Georgia Chatham County, Georgia East Chicago, Indiana Effingham County, Georgia Farmington Hills, Michigan Gainesville, Georgia Gary, Indiana Glynn County, Georgia	Hall County, Georgia Hammond, Indiana Hobart, Indiana Hyattsville, Maryland Knox County, Tennessee Lake County, Indiana Lawrence, Massachusetts Maryland Transportation Authority Polk County, Florida Prescott Valley, Arizona San Antonio, Texas Venice, Florida Waltham, Massachusetts Whiting, Indiana
<p>Administrative Services: Managed and conducted studies of internal service functions, including human resources, information technology, purchasing, risk management and finance. Scopes of services included analyses of resource requirements, workflow, customer service practices, and comparison to best management practices and peer agencies.</p>	
Ada County (ID) Highway District - Finance, Purchasing Augusta-Richmond (GA) - Tax Commissioner Barnstable (MA) - Tax Assessor Beaufort County (SC) - Tax Increment Financing Brattleboro (VT) - Town Clerk, Lister Chatham County (GA) - Finance Effingham County (GA) - Finance, Tax Collector, Purchasing Farmington Hills (MI) - Finance, Purchasing Floyd County (GA) - Tax Assessor, Human Resources	Gainesville and Hall County (GA) - Tax Assessor, Finance, Human Resources Knox County (TN) - Finance, Human Resources, Risk Management, Trustee Las Vegas (NV) Metropolitan Police Department - Human Resources Lawrence (MA) - Finance Maryland Transportation Authority - Human Resources, Risk Management, Purchasing Nashville and Davidson County (TN) - Internal Services Benchmarking Prescott Valley (AZ) - Finance Waltham (MA) - Finance, Human Resources
<p>Parks & Recreational Services: Mr. Haley has conducted and managed many studies of parks and recreational services. These included analyses of staffing, organizational structure, management information systems use, recreational service provision, maintenance management, asset management, financial and administrative services, and others. These studies focused on optimizing the use of resources, planning and managing resources, business plan development, strategic planning, and other topics.</p>	

TOWN OF TRUMBULL, CONNECTICUT
Proposal to Provide Consulting Services for the Parks and Recreation Activities

ROBIN G. HALEY SENIOR MANAGER, MATRIX CONSULTING GROUP	
California Roseville Connecticut Greenwich Florida Davie Illinois Orland Park, Trumbull Indiana Lake County	Massachusetts Waltham Michigan Farmington Hills Rhode Island Jamestown Utah Salt Lake City Vermont Brattleboro
<p>Public Works and Utilities: Mr. Haley has conducted and managed many studies of public works and utilities functions, including streets, solid waste and recycling, fleet management, engineering, water and wastewater utilities, traffic and facilities management. Scopes of services have included analyses of street replacement and resurfacing, management and planning of maintenance activities, crew sizes, staffing requirements, fleet and equipment needs, vehicle maintenance and replacement, infrastructure maintenance and replacement, staff utilization, customer service and responsiveness, as well as other functions.</p>	
Arizona Maricopa County, Peoria, Pinal County, Prescott Valley	Missouri Lee's Summit
California Ventura County, West Covina	Nebraska Sarpy County
Colorado Aurora, Thornton	New York Onondaga County
Florida Escambia County Utilities Authority, Hernando County, Pasco County Sheriff, Polk County, Tampa, Venice	North Carolina Nags Head, Winston-Salem
Georgia Augusta-Richmond, Floyd County, Gainesville, Hall County, Macon	North Dakota Grand Forks
Idaho Ada County Highway District	Oregon Douglas County
Illinois Moline, Rock Island	Puerto Rico Ponce
Indiana East Chicago, Gary, Hammond, Lake County, Whiting	South Carolina Beaufort County, Charleston County, Hilton Head Public Service Dist. No. 1, Rock Hill
Louisiana Alexandria	Tennessee Nashville, Springfield
Massachusetts Chelsea, Haverhill, Lawrence, Springfield, Waltham	Texas San Antonio, Southlake
Michigan Farmington Hills	Virginia Lynchburg
Mississippi Jackson	Wisconsin Milwaukee, Waukesha
<p>Education: B.S. Georgia Institute of Technology, Atlanta, Georgia 1980 M.B.A. Georgia State University 1988</p>	

TOWN OF TRUMBULL, CONNECTICUT

Proposal to Provide Consulting Services for the Parks and Recreation Activities

**ALAN D. PENNINGTON
VICE PRESIDENT, MATRIX CONSULTING GROUP**

Background: Alan Pennington is a Vice President with the Matrix Consulting Group based in the St. Louis regional office. He has been employed by the Matrix Consulting Group since 2005. Prior to that he served for over 15 years in public sector positions in Maine and Illinois. He served in Peoria, Illinois (from 1992 – 2005), in various positions including Assistant City Manager, Assistant Human Resources Director, and Labor Relations Manager. Mr. Pennington has conducted operational studies and analysis, budget preparation, implementation of performance measurement systems, direct supervision of an emergency communications center, equal opportunity unit and a labor negotiator.

Agency-Wide Studies: Participated on project teams conducting evaluations of entire city organizations. Work scope included evaluation of business processes, service levels, policies and procedures, staffing levels, evaluation of spans of control, and reviewing alternatives options for overall organizational structure.

Albuquerque, New Mexico
Corporation for Public Broadcasting, Wash, D.C.
Fort Morgan, Colorado
Franklin Township, New Jersey
Half Moon Bay, California
Johnson County, Kansas
Montpelier, Vermont
Mt. Lebanon, Pennsylvania
Orland Park, Illinois

Orleans, Massachusetts
Peoria County, Illinois
Rancho Mirage, California
Rancho Palos Verdes, California
Raymore, Missouri
Roseville, California
South Coast Water District, California
University at Albany - SUNY
Washington State Ferries

Administrative Services: Conducted studies of administrative support services including Human Resources, Finances, Procurement, and City Clerk. Study scope of work included performance measurement, customer service (internal and external), technology utilization, staffing evaluations, policy and procedure review, and comparison to best management practices.

Avon (CT) - HR, Finance, Maintenance
Charlotte (NC) - Procurement
CPS Consultants (CA) – Organizational, HR
Highland Park (IL) – HR
Ketchikan (AK) - HR
Marshall University (WV) - Procurement
Matanuska (AK) - School Site Selection
Missouri Department of Conservation – HR
Missouri Department of Conservation – Asset Management
Peoria County (IL) - HR, Procurement, Finance
Portsmouth (NH) - Labor Relations, Overtime

Reno/Washoe County (NV) – Procurement
Salt Lake City (UT) - Human Resources
Santa Clara Valley Water (CA) - Procurement
Springfield (MA) - City Clerk
Springfield (MA) - Finance, Procurement
Sunnyvale (CA) – Finance, Procurement
Volusia County Transportation Planning Organization (FL) – Human Resources
University of Maryland University College – Human Resources, Payroll
West Virginia University (WV) – Procurement

Parks and Recreation: Evaluated parks and recreational functions including scope of services provided, utilization of facilities, public-private partnerships, preventive maintenance and long-range planning, and technology utilization.

Grand Rapids, Michigan
Los Angeles, California

Orleans, Massachusetts
Southlake, Texas

**JOCELYN MATHIASSEN
MANAGER, MATRIX CONSULTING GROUP**

Background: Professional manager with the ability to lead complex projects and programs, strong written and oral communications skills, and a commitment to excellence. Experience working with local governments, businesses, development banks, and non-profits in the US and abroad.

Service Delivery: Managed several initiatives to streamline and simplify service delivery to citizens and businesses seeking to do business with municipal government. In Bellevue, Washington led an initiative to organize and implement "Service First," combining multiple front-line services to simplify and streamline citizens' interactions with the city. Worked with all town departments to identify and address concerns related to the relocation of city operations from multiple locations to a single new downtown Civic Center. Identified opportunities to improve efficiencies and deliver better customer service through design of public areas.

Regionalization: For the Capitol Region Council of Governments conducted a detailed study of opportunities for regional service sharing among Connecticut municipalities. Managed a complex grant application process that resulted in \$8.6 million in municipal Service Sharing grants for pilot projects demonstrating benefits of regional service sharing.

Administrative Services: For the city of Bellevue, Washington the Capitol Region Council of Governments in Hartford, Connecticut conducted studies of administrative functions, including budgeting, human resources, information technology, purchasing and risk management. Worked with elected officials to design and obtain approval for new procurement policies for professional services. Reviewed agency human resource benefits and, working with employees, unions, and benefits providers, identified changes to the overall benefits framework that would add value for employees while controlling costs. Reviewed outdated personnel policies, and worked with managers, employees, union officials, and elected officials to draft and obtained approval for revised policies in a broad range of areas including: internet usage, laptop security, parking and carpooling, and telecommuting. Revamped and prepared agency budget documents, resulting in CRCOG's first Government Finance Officers Association award for Excellence in Budget Preparation

Emergency Preparedness and Emergency Response: Served as liaison to Emergency Operations Committees, participating in drills, assisting with after-action assessments, and working directly on two major disasters and their aftermath.

**JOCELYN MATHIASEN
MANAGER, MATRIX CONSULTING GROUP**

Permitting and Use: As department director, led the reform of the Department of Permitting and Land Use for the City of Milford, Connecticut, transforming the agency into one focused on customer service and efficiency. Consolidated planning, wetlands, floodplain management, and building review processes to reduce duplication of time and effort, cross-trained clerical staff, and developed improved educational materials and website information to reduce confusion on the part of applicants. Implemented on-line permitting for all projects. Eliminated wait lines outside of the Building department (a major source of frustration) through establishment of an on-line, virtual queue. Established electronic field inspections so that inspectors could enter results into a tablet computer on-site with the information immediately uploaded to the internet and back-end permit tracking program.

Working for the Capitol Region Council of Governments, led a consortium of ten municipalities in the development of a regional permitting software program that could be used for on-line applications as well as back-office management of the permit review process across multiple disciplines, including health and fire as well as traditional land use agencies. Worked directly with IT directors and building officials from municipalities to ensure that the system met their needs and that concerns were addressed. Led creation of the web site www.viewmypermitct.org as a portal through which permit applicants could apply, pay for, and receive permits from numerous cities.

As Assistant to the City Manager in Bellevue, Washington, worked with five review agencies (building, land use, utilities, transportation, and fire) to make the land use and permitting process more efficient and customer friendly. Conducted a detailed fee study leading to City Council approval of a revised fee schedule that was consistent across reviewing agencies and allowed for greater stability in staffing through construction cycles. Oversaw the creation of a streamlined process for review and approval of simple residential remodel projects as well as commercial tenant fit-out projects. The project resulted in measurable improvements in timelines, customer satisfaction, and staff morale. It was selected as a case study at the 2005 Innovations in Government conference in Sarasota, Florida.

PUBLIC PRESENTATIONS

- Regional Approaches to Municipal Finance, Assessment & Central Office Functions – Office of Policy Management Conference on Municipal Shared Services in Connecticut – 2010
- Regional On-Line Permitting - New England Association of Regional Councils Conference, Bretton Woods, NH – 2009
- Municipal Shared Services in Connecticut – New England Association of Regional Councils, Northampton, MA – 2008
- From Chaos to Harmony: Reforming Development Services – Transforming Local Government Conference, Sarasota, FL – 2005

EDUCATION

Ms. Mathiasen received a BA in Government from Oberlin College in Oberlin, Ohio and a Master of Public Policy from Harvard University in Cambridge, Massachusetts.

**APPENDIX B – INSURANCE EXHIBIT –
PROFESSIONAL SERVICES**

APPENDIX B

**TOWN OF TRUMBULL, CONNECTICUT
REQUEST FOR QUOTATION (RFQ)
AGREED UPON CONSULTING FOR THE PARKS AND RECREATION ACTIVITIES**

RE BID RFQ #6116

DUE: May 5, 2015 at 2:00 PM

INSURANCE EXHIBIT - PROFESSIONAL SERVICES

The professional individual or firm shall procure and maintain for the duration of the contract insurance against claims for injuries to persons or damages to property which may arise from, or be in connection with the performance of the work hereunder by the individual or the firm, his agents, representatives, or employees. The cost of such insurance shall be included in the proposal.

For the purpose of this clause, the term "professional individual or firm" shall also include the individual's or firm's respective officers, agents, officials, employees, volunteers, boards and commissions.

A. Minimum Scope and Limits of Insurance

1. Broad Form Comprehensive General Liability \$1,000,000 combined single limit per occurrence for bodily injury, personal injury, property damage, and products / completed operations.
2. Automobile Liability \$1,000,000 combined single limit per occurrence for bodily injury and property damage
3. Umbrella Liability \$1,000,000 per occurrence, following form.
4. Workers' Compensation Limits as required by State of Connecticut Labor Code
5. Employers' Liability \$100,000 each accident \$500,000 disease/policy limit \$100,000 disease/each employee
6. Professional Liability (if used on a claims-made basis, insurance coverage shall be maintained for the duration of the contract and for two (2) years following contract completion.) \$1,000,000 per occurrence \$1,000,000 aggregate
7. Personal Property Coverage
8. Adequate insurance to cover the value of personal property (including but not limited to, personal computers) belonging to the Consultant while located on Town property, while in use or in storage, for the duration of the contract.

B. Aggregate Limits

Any aggregate limits must be declared to and be approved by the Town. At the option of the Town, the insurer shall increase or eliminate the aggregate limit and notify the Town of any erosion of aggregate limits.

C. Deductibles and Self-Insured Retention's

Any deductibles or self-insured retention's must be declared to and be approved by the Town. At the option of the Town, the insurer shall reduce or eliminate such deductibles or self-insured retention's as regards the Town or the Consultants shall procure a bond which guarantees payment of the losses and related investigations, claims administration and defense expenses. At no time will the Town be responsible for the payment of deductibles or self-insured retention's.

D. Notice of Cancellation or Non-renewal

Each insurance policy required by this Exhibit shall be endorsed to state that coverage shall not be suspended, voided, canceled, or reduced, either in coverage or in limits, except after thirty (30) days prior written notice by certified mail, return receipt requested, has been given to the Town.

E. Other Insurance Provisions

The policies are to contain, or be endorsed to contain, the following provisions;

1. Liability, (General, Automobile, Professional) Coverage;

- a. "The Town of Trumbull and its respective officers, agents, officials, employees, volunteers, boards and commissions" are to be named as additional insured with regards to liability arising out of activities performed by or on behalf of the consultant; products and completed operations of the Consultant; premises owned, leased or used by the Consultant. The coverage shall contain no special limitations on the scope of protection afforded to the Town.
 - b. The Consultant's insurance coverage shall be the primary insurance as regards the Town. Any insurance or self-insurance maintained by the Town shall be in excess Consultant's insurance and shall not contribute with it.
 - c. Any failure to comply with the reporting provisions of the policies shall not affect coverage provided to the Town.
 - d. Coverage shall state that the Consultant's insurance shall apply separately to each insured against whom a claim is made or a suit is brought, except with respect to the limits of the insurer's liability.
2. **Workers' Compensation and Employer's Liability Coverage**
- a. The insurer shall agree to waive all rights of subrogation against the Town for losses arising from the work performed by the Consultant for the Town.
 - b. If State statute does not require the Consultant to obtain Workers' Compensation insurance, then the Consultant shall furnish the Town with adequate proof of the self-employment status/ The Consultant agrees to waive all rights of claims against the Town for losses arising from the work performed by the Consultant. In the event that during the contract this self employment status should change, the Consultant shall immediately furnish proper notice to the Town and a certificate of insurance indicating that Workers' Compensation insurance and Employer's Liability coverage has been obtained by the Consultant as required by this Exhibit.

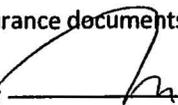
F. Acceptability of Insurers

1. Insurance is to be placed with insurers which have a Best's rating of at least A.
2. Insurance companies must either be licensed to do business in the State of Connecticut or be deemed to be acceptable by the Town's Finance Director.

G. Verification of Coverage

The Consultant shall furnish the Town with certificates of insurance effecting coverage required by this clause. The certificates and endorsements for each insurance policy are to be signed by a person authorized by the insurer to bind coverage on its behalf. The certificates and endorsements are to be received and approved by the Finance Director before work commences. Renewal of expiring certificates shall be filed thirty (30) days prior to expiration. The Town reserves the rights to require complete, certified copies of all required policies, at any time.

All insurance documents required by this Exhibit shall be mailed to the Director of Finance.

Signed:  _____

Title: **President** _____

Date; **05/04/2015** _____

**APPENDIX C –
GENERAL PURPOSE FINANCIAL STATEMENTS**

Matrix Consulting Group
Profit and Loss 2014

Ordinary Income/Expense

Income

925 — Income Tax (Canada)	6,966.95
800 Client Revenue	2,401,224.35
920 Income Tax (State)	-319.82
940 Other Revenue	-437.79
940 Reimbursements	2,845.48

Total Income 2,410,279.17

Expense

655 — Penalties 32.84

ADMIN

700 — Common Stock Repurchase	18,440.09
635 — State Corporation Fees	6.00
400 Office Rent & Leases	66,430.51
410 Telephone	23,712.19
430 Office Supplies	13,163.54
440 Computer Software	1,465.38
450 Printing	1,791.31
470 Postage	9,058.51
480 Dues & Subscriptions	5,593.00
490 Advertising & Marketing	10,051.16
510 Convention Expenses	5,929.66
520 Insurance-Property & Auto	1,199.20
525 Insurance-Professional	8,418.00
530 Insurance Workers Comp	4,362.80
535 — Employers Liability Insurance	1,571.00
540 Repairs & Maintenance	95.00
550 Equipment Rental/Lease	2,929.93
560 Furniture & Equipment	4,701.74
570 Legal Costs	4,473.66
580 Accounting Costs	12,444.05
585 Other Professional Services	2,425.00
590 Subcontractors	398,040.30
600 Interest Paid	5,414.82
610 Bank Service Charges	607.40
620 Business Licenses	688.15
630 Income Taxes-Federal	2,023.00
640 Income Taxes-State	5,366.19
660 Other Operating Expenses	250.00

TOWN OF TRUMBULL, CONNECTICUT
Proposal to Provide Consulting Services for the Parks and Recreation Activities

Total ADMIN	<u>610,651.59</u>
C TRAVEL	
200 Auto	10,030.09
210 Transportation Expenses	142,313.23
220 Hotel Expenses	70,854.86
230 Meals & Entertainment	16,260.21
240 Telephone	548.85
250 Office Supplies	782.13
260 Photocopy	322.41
280 Miscellaneous Expenses	<u>835.15</u>
Total C TRAVEL	<u>241,946.93</u>
NC TRAVEL	
300 Auto Expenses	3,563.91
310 Transportation Expenses	30,680.29
320 Hotel Expenses	11,653.15
330 Meals & Entertainment	6,051.99
Total NC TRAVEL	<u>51,949.34</u>
PERSONNEL	
165 — HSA Medical	11,022.50
100 Salaries	1,204,141.94
105 Bonuses	25,750.00
130 Retirement Plan	78,000.00
140 Federal Payroll Taxes	78,323.50
150 State Payroll Taxes	6,659.61
160 Health Insurance	90,183.82
180 Key Man Life Insurance	2,830.00
190 Group Life & Disability	<u>6,304.45</u>
Total PERSONNEL	<u>1,425,215.82</u>
Total Expense	<u>2,329,796.52</u>
Net Ordinary Income	<u>80,482.65</u>
Net Income	<u>2,482.65</u>

Matrix Consulting Group
Profit and Loss 2014

	<u>Jan - Dec '13</u>
Ordinary Income/Expense	
Income	
800 Client Revenue	2,330,293.59
920 Income Tax (State)	-852.06
940 Other Revenue	39.05
940 Reimbursements	353.13
Total Income	<u>2,329,833.71</u>
Expense	
ADMIN	
700 — Common Stock Repurchase	36,572.75
635 — State Corporation Fees	750.00
400 Office Rent & Leases	62,369.42
410 Telephone	25,756.37
430 Office Supplies	5,577.34
440 Computer Software	2,649.65
450 Printing	1,386.79
470 Postage	9,412.86
480 Dues & Subscriptions	5,373.00
490 Advertising & Marketing	7,522.32
510 Convention Expenses	6,475.96
520 Insurance-Property & Auto	1,464.25
525 Insurance-Professional	7,918.00
530 Insurance Workers Comp	3,692.75
535 — Employers Liability Insurance	1,571.00
540 Repairs & Maintenance	99.00
550 Equipment Rental/Lease	4,171.87
560 Furniture & Equipment	9,381.05
570 Legal Costs	5,563.25
580 Accounting Costs	12,130.08
585 Other Professional Services	3,266.84
590 Subcontractors	319,943.17
600 Interest Paid	9,594.37
610 Bank Service Charges	1,062.75
620 Business Licenses	1,038.98
640 Income Taxes-State	4,612.31
660 Other Operating Expenses	941.83
Total ADMIN	<u>550,297.96</u>

TOWN OF TRUMBULL, CONNECTICUT
Proposal to Provide Consulting Services for the Parks and Recreation Activities

C TRAVEL	
200 Auto	11,053.56
210 Transportation Expenses	138,133.36
220 Hotel Expenses	77,973.95
230 Meals & Entertainment	16,415.76
240 Telephone	524.62
250 Office Supplies	560.28
270 Postage	88.31
280 Miscellaneous Expenses	830.10
Total C TRAVEL	245,579.94
NC TRAVEL	
300 Auto Expenses	2,862.54
310 Transportation Expenses	30,877.58
320 Hotel Expenses	14,008.30
330 Meals & Entertainment	6,483.66
340 Miscellaneous Expenses	120.00
Total NC TRAVEL	54,352.08
PERSONNEL	
165 — HSA Medical	9,595.00
100 Salaries	1,114,518.82
105 Bonuses	107,476.00
130 Retirement Plan	95,088.00
140 Federal Payroll Taxes	71,165.87
150 State Payroll Taxes	3,435.58
160 Health Insurance	70,224.48
180 Key Man Life Insurance	2,830.00
190 Group Life & Disability	5,700.36
Total PERSONNEL	1,480,034.11
Total Expense	2,330,264.09
Net Ordinary Income	-430.38
Net Income	-430.38

<p>ALAN D. PENNINGTON VICE PRESIDENT, MATRIX CONSULTING GROUP</p>	
<p>Community Development (Planning, Building, Code Enforcement): Evaluated the development review and permitting processes. Conducted assessment of staffing, operations, process mapping, technology utilization, performance level assessment, and customer service.</p>	
<p>Cupertino, California Dayton, Ohio Des Moines, Washington Greenville, South Carolina Gwinnett County, Georgia Hanover County, Virginia Hilton Head Island, South Carolina Johnson City, Tennessee Lawrence, Kansas</p>	<p>Lee's Summit, Missouri (Code Administration) Lee's Summit, Missouri (Planning) Little Rock, Arkansas Manatee County, Florida Marion County, Oregon San Jose, California Springfield, Massachusetts Sunrise, Florida (two studies) West Palm Beach, Florida</p>
<p>Public Works and Utilities: Conducted studies of full service public works departments including maintenance, fleet, traffic, engineering, and roads. Studies have focused on evaluation of maintenance management, crew sizes and staff utilization, technology, organizational structure, standard operating procedures, levels of performance management, and feasibility of shares services with neighboring governmental units.</p>	
<p>Alexandria, Virginia Charleston County, South Carolina Franklin, Tennessee (Water/Wastewater) Franklin, Tennessee (Fleet Management)</p>	<p>Milwaukee, Wisconsin Nashville-Davidson County, Tennessee Orleans, Massachusetts Washington County, New York</p>
<p>PROFESSIONAL ASSOCIATIONS: American Association of Code Enforcement (AACE) American Planning Association (APA) International Code Council (ICC)</p>	
<p>KEY SKILLS: Six Sigma Deployment Champion Certified</p>	
<p>EDUCATION: BA, University of Maine – Public Management; 1990. MPA, University of Maine – Public Administration, 1992.</p>	

GINNY SILVA JAQUITH
SENIOR MANAGER, MATRIX CONSULTING GROUP

Background: Ginny Jaquith has over 35 years experience in the public sector, education and as a consultant to local, regional and state governments and the nonprofit sector. While with Hughes, Heiss and Associates, Ginny Jaquith participated in over 80 executive recruitment processes for local and regional governments and more than 30 management audits for governmental and nonprofit agencies. In addition, Dr. Jaquith served as faculty and Department Chair in the Recreation, Parks, and Tourism Department at San Francisco State University.

Consulting Experience: Conducted studies focused on parks, recreation, library, cultural arts, volunteer and community service functions for cities, special districts and county organizations. Provided strategic planning consultation to nonprofit organizations. Representative studies include:

Beverly Hills, California
 Salt Lake City, Utah
 Washoe County, Nevada
 Palo Alto, California
 Mountain View, California

Los Angeles County, California
 Reno, Nevada
 Orange, California
 Nebraska State Arts Council, Nebraska
 San Francisco, California

Education Experience: Over a 30 year university academic career, Dr. Jaquith developed and taught coursework in the graduate and undergraduate programs in Park, Recreation, Tourism and Nonprofit curriculum focused on administration and management, planning and evaluation, program planning and service delivery, and leadership. Conducted research studies, implemented grant projects in a variety of areas, managed a number of university-wide projects and coordinated internship programs.

- Department Professor, Recreation and Leisure Studies Department, San Francisco State Univ.
- Directed Operation Access, Expanding Recreational Opportunities for Persons With Disabilities.
- Directed Nonprofit Agency Administration Certificate program affiliated with American Humanics.
- Developed and implemented statewide family camping program (FamCamp) in conjunction with California State Parks and Recreation Department and nonprofit organizations in California
- University representative to Lake Merced Task Force in conjunction with San Francisco Recreation and Park Department and Public Utilities Department
- Established and directed university-based affiliate community service programs including TRUE, Pacific Leadership Institute and Tall Ship Semester at Sea
- Developed and implemented American Humanics Honors Internships in Social Entrepreneurship grant project funded by the Ewing Marion Kauffman Foundation.

Public Sector, Nonprofit and Community Service Experience: More than 40 years active participation as elected official, parks and recreation professional, nonprofit organization director and extensive experience in the development of and fundraising for community based projects.

- Mayor and City Councilmember, City of Pacifica, California (12 years)
- Department Director, Parks, Beaches and Recreation Department, Pacifica, CA (17 years)
- Member, San Mateo County Civil Grand Jury, 2008-09, 2009-10 juries
- Member, Sharp Park Golf Course Task Force, Pacifica, California
- National Board of Directors, American Humanics, Inc., Missouri
- Vice President, Board of Directors, Pacific Coast Fog Fest, Pacifica, California

Education:

BA degree from San Jose State University, MS degree from San Francisco State University and doctoral degree from the University of San Francisco

Revised/Distributed at 4/28/15 Finance Committee Meeting

DEPARTMENT OF HUMAN RESOURCES

TOWN OF TRUMBULL

COMPENSATION PLAN

FOR

**NON-UNION, APPOINTED AND ELECTED
OFFICIALS**

Adopted: May, xx 2015
| Effective January 1, 2016

I. **Introduction:**

A. **Background:** This Pay Plan covers non-union, appointed and elected officials except as specifically noted.

B. **Pay Plan Objectives:**

1. Internal equity;
2. Competitive with the municipal market;
3. Links pay and performance;
4. Easy to administer;
5. Provides continuity and flexibility.

II. **Administration of the Compensation Plan for Non-Union, Appointed and Elected Officials:**

A. **Appointments:** The minimum rate of pay for a classification shall normally be paid upon new appointment. An appointing authority may recommend a new appointment or reappointment at a rate higher than the minimum rate established for the classification, by written request to the Director of Labor Relations. The Director may approve a starting or reappointment rate beyond the minimum of the salary range but not to exceed the midpoint of the range. Any appointment above the midpoint shall be subject to Town Council approval.

B. **Promotions:** In the event an employee is promoted from one position covered by this salary plan to another position included in a different grade of this salary plan, the salary of the employee shall increase at least 10% but not more than 20%, except in such cases when the increase would place the salary beyond the maximum established for the grade of that position or below the minimum established for that position. In the former case, the maximum rate of pay for that classification will be paid and in the latter case, the minimum rate of pay for that classification will be paid. The determination of the actual percentage increase will be made by the individual's supervisor based on that individual's salary in the range subject to the approval of the Director of Labor Relations.

C. **Within Grade Salary Increase:** All employees covered by this plan (except elected officials) shall receive increases based solely on performance appraisals, on forms approved by Human Resources. For employees with less than three months tenure, no increases shall be given. Performance appraisal forms are appended hereto and made a part hereof. Performance appraisal forms shall be based on job descriptions, tasks and standards developed for each position covered by this plan. Salary increases shall be, at a minimum, the same as provided to the supervisors union (MATHAS). A salary adjustment shall be given if the evaluation indicated the individual "meets expectations". If the employee fails to meet expectations, he or she shall not be eligible for a salary adjustment. Effective July 1st each year's salaries shall be adjusted based on the terms and condition outlined herein. As condition precedent, Personnel Appraisal Forms must be completed and submitted to the Human Resources Department by the date established by the Human Resources department for the individual to be eligible for a salary increase.

D. **Pay Rates for New Positions:** In the event a new classification is established, the Personnel Department set the appropriate pay grade.

F. **Reallocation of Positions:** In the event of significant changes in the job content of a particular Ordinance position, the Personnel Director shall recommend to the ~~Personnel Committee~~ Town Council the appropriate pay grade.

Reallocation of a position does not impact the salary of any incumbent unless the incumbent is below the minimum or above the maximum of the new grade. In the event of the former, the incumbent's salary shall be adjusted to the minimum of the grade. In the latter case, the incumbent's salary shall remain fixed until the maximum of the new range reaches the incumbent's salary.

G. **Elected Officials:** The salary for elected officials and certain appointed Officials shall be as outlined in Section K. Changes in the salaries for elected officials shall be effective January 1st ~~after of the year~~ they are elected or reelected ~~or as indicated in Section K below.~~

H. **Position Status:** All salary ranges and recommendations are for full time positions. If positions are filled on less than a full time basis, salaries shall be prorated and adjusted accordingly.

I. **Maintenance of Salary Plan Objectives:** In order to maintain the salary plan objectives, the Personnel department shall periodically ~~conduct a review~~ of the salary ranges.

J. **Adjustment of Ranges:** The ranges shall be adjusted every other year starting January 1, 2018, by the statewide average of public sector union settlements ~~for the prior fiscal year~~ (non-public safety) rounded to the nearest quarter.

K. Effective January 1, 2016 allocation of positions to grade shall be as follows: *

Category

1. Elected Officials Effective: January 1, 2016

Selectman (First Term)	Year 1 Minimum of Director of Labor Relations
Selectman (Second term and each term thereafter)	Year 1 Minimum of Director of Finance Range Year 2 Midpoint of Director for Finance Range
Treasurer (Part time)	25% of Minimum of Director of Finance Range
Town Clerk	60% of the Minimum of Dir. of Finance Range
Recorder of Voters (Part time)	10% of the Minimum of the Director of Finance Range

	<u>*Minimum</u>	<u>Midpoint</u>	<u>Maximum</u>
2. Department Heads			
Chief of Staff	\$77,500	\$87,500	\$97,500
Director of Finance	\$115,000	\$125,000	\$135,000
Director of Public Works	\$110,000	\$120,000	\$130,000

Director of Health	\$90,000	\$100,000	\$110,000
Director of Labor Relations	\$110,000	\$120,000	\$130,000
Director of ECD	\$105,000	\$115,000	\$125,000
Director of EMS	\$80,000	\$90,000	\$100,000
Director of Parks and Recreation	\$95,000	\$105,000	\$115,000
Police Chief	\$115,000	\$125,000	\$135,000
Operations Director Golf Course	\$85,000	\$95,000	\$105,000
3. <u>Supervisors/Administrators</u>			
Asst. Finance Director	\$85,000	\$95,000	\$105,000
Personnel Manager	\$72,500	\$82,500	\$92,500
Deputy Police Chief	\$100,000	\$110,000	\$120,000
4. <u>Support Staff</u>			
Executive Assistant (First Selectman/PD)	\$55,000	\$60,000	\$65,000
Secretary (First Selectman)	\$45,000	\$50,000	\$55,000
Human Resources Assistant	\$45,000	\$50,000	\$55,000

* Any employee below the minimum shall be moved to the minimum of the range.

L. **Transition:** Those employees with existing employment contracts will be covered by the plan after their current contract expires or if mutually agreed upon may execute amendments to their current contracts where they will be subject to the Plan.

M. **Effective Date of Pay Plan:** January 1st, 2016

STATE OF CONNECTICUT WAGE AND SALARY SETTLEMENTS

Settlements Under MERA (Last 18 Months)

<u>Year Effective</u>	<u>BOE</u>	<u>Municipal*</u>	<u>Police</u>	<u>Fire</u>	<u>Overall</u>
2013-14	1.95%	1.94%	1.77%	1.95%	1.94%
2014-15	2.07%	2.27%	2.38%	2.24%	2.16%
2015-16	2.12%	2.38%	2.50%	2.34%	2.23%
2016-17	2.26%	2.44%	2.57%	2.50%	2.32%

*Includes police and fire settlements.

Note: Settlement percentages do not include increment.

Teacher and Administrator Salary Settlements (2014-15 Season as of 3/11/15) (Including Increment)

<u>Year Effective</u>	<u>Teachers</u>	<u>Administrators</u>
2015-16	3.09%	2.61%
2016-17	3.04%	2.58%
2017-18	3.15%	2.58%

Teacher and Administrator Salary Settlements (2014-15 Season as of 3/11/15) (Excluding Increment)

<u>Year Effective</u>	<u>Teachers</u>	<u>Administrators</u>
2015-16	1.74%	2.31%
2016-17	1.71%	2.30%
2017-18	1.52%	2.29%

Source: Shipman & Goodwin LLP Settlement Databases.

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FY 2014-2015	CCM 2015 Salary Survey Data		Mayor	First Selectman	Chief Appointed Official	Fairfield County
	Municipality	2013 CT Health Dep. Pop. Est.				
Ridgefield	25,164			\$ 122,043		FC
Windham	25,213	\$ 5,000			\$ 120,000	
Farmington	25,613				\$ 152,359	
Mansfield	25,774				\$ 143,291	
South Windsor	25,846				\$ 163,612	
Wethersfield	26,510				\$ 123,600	
Westport	27,308			\$ 101,475	\$ 90,000	FC
New London	27,545	\$ 86,000			\$ 52,000	
New Milford	27,767	\$ 89,871				
Branford	27,988			\$ 102,960		
Newtown	28,113			\$ 104,484		FC
East Haven	29,120	\$ 85,000			\$ 80,000	
Windsor	29,142				\$ 134,303	
Cheshire	29,150				\$ 145,986	
Vernon	29,161	\$ 30,000			\$ 119,687	
Newington	30,756				\$ 140,378	
Naugatuck	31,707			\$ 79,600		
Glastonbury	34,768				\$ 169,592	
Torrington	35,611	\$ 98,039				
Trumbull	36,571			\$ 104,104	\$ 71,575	FC
Shelton	40,261	\$ 110,193				FC
Groton (T)	40,176				\$ 136,675	
Norwich	40,347	\$ 56,544			\$ 127,500	
Southington	43,661				\$ 155,400	
Enfield	44,743				\$ 142,485	
Wallingford	45,141	\$ 85,140				
Middletown	47,333	\$ 85,000			\$ 64,522	
East Hartford	51,199	\$ 88,075				
Stratford	52,112	\$ 110,000			\$ 105,000	FC
Milford	53,137	\$ 96,697			\$ 64,025	
Manchester	58,211	\$ 3,000			\$ 163,268	
Meriden	60,456	\$ 16,788			\$ 147,878	
Bristol	60,568	\$ 100,446				
Fairfield	60,855			\$ 131,428	\$ 91,800	FC
Hamden	61,607	\$ 95,000			\$ 92,000	
Greenwich	62,396			\$ 131,187	\$ 192,056	FC
West Hartford	63,371				\$ 156,832	
Danbury	83,684	\$ 106,875			\$ 81,684	FC
Norwalk	87,775	\$ 114,524				FC
Waterbury	109,676	\$ 125,702				
Hartford	125,017	\$ 146,780			\$ 170,000	
Stamford	126,456	\$ 161,649			\$ 151,959	FC
New Haven	130,660	\$ 131,000			\$ 132,000	
Bridgeport	147,213	\$ 132,459			\$ 132,459	FC

FY 2014-2015	CCM 2015 Salary Survey Data				
Municipality	2013 CT Health Dep. Pop. Est.	Mayor	First Selectman	Mayor/1st Sel	
Ridgefield	25,164		\$122,043	\$ 122,043	FC
Westport	27,308		\$101,475	\$ 101,475	FC
Newtown	28,113		\$104,484	\$ 104,484	FC
Trumbull	36,571		\$104,104	\$ 104,104	FC
Shelton *	40,261	\$110,193		\$ 110,193	FC
Stratford	52,112	\$110,000		\$ 110,000	FC
Fairfield	60,855		\$131,428	\$ 131,428	FC
Greenwich	62,396		\$131,187	\$ 131,187	FC
Danbury	83,684	\$106,875		\$ 106,875	FC
Norwalk	87,776	\$114,524		\$ 114,524	FC
Stamford	126,456	\$161,649		\$ 161,649	FC
Bridgeport	147,216	\$132,459		\$ 132,459	FC

Population 25000+
* Non CCM data

Average \$ 119,201.75