



**PENNSYLVANIA
ECONOMY LEAGUE**
Information, Insight, Integrity.

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November 27, 2018

VIA EMAIL AND U.S. MAIL

Thomas D. Fortnum, MBA, PRSBO
Assistant Business Manager
Gettysburg Area School District
900 Biglerville Road
Gettysburg PA 17325-7897

Dear Mr. Fortnum:

The attached proposal of the Pennsylvania Economy League, Central PA, LLC (PEL) to undertake a comprehensive analysis of demographics, housing and related activities, and other relevant factors in the Gettysburg Area School District (district) and generate aggregate projections of K-12 enrollments in the district by grade covering the next 10 years is a response to the district's Request for Proposal dated November 2, 2018 (as amended).

PEL staff has undertaken more than 200 projects of this type for Pennsylvania school districts, and these studies have proved to be accurate and reliable and of great value to these districts in making important decisions with respect to future classroom, staffing, program, and operational needs.

PEL is an independent, nonpartisan, nonprofit organization which since 1936 has been helping state and local governments meet the increasingly complex demands placed upon them. PEL has a long tradition of involvement in matters relating to public school planning, management, and finance both in terms of statewide public policy issues and with respect to the operations of individual school districts. The common theme of all of PEL's work is to provide facts and objective analyses so that sound public policy decisions can result. PEL has been widely recognized for its expertise and for being free of partisan considerations, vested interests, profit motivation, and other factors which can often be perceived as clouding government decision-making. PEL has offices in Philadelphia, Harrisburg, Pittsburgh, and Wilkes-Barre.

PEL's studies of demographics, housing and related activities, and public school enrollments involve a very labor-intensive process that normally includes a review of population trends; birth patterns; migration patterns (using U.S. Census data, annual births, and district-provided enrollment figures); the proportion of children enrolled in non-district schools and educational programs (for example, private/parochial schools, home schools, charter schools, cyber schools, full-time area career and technical centers, full-time Intermediate Unit programs—even if educated in district classrooms assigned to the Intermediate Unit, other full-time out-of-district programs, state owned schools, full-time consortium-operated alternative schools, juvenile correctional facilities, etc.); and historical enrollment trends. In addition, we analyze the annual number of building and/or occupancy permits issued for new and/or rehabilitated housing units, housing developments and related activity recently completed and underway or planned, turnover in existing housing stock, the relationship of children to housing units, the amount of undeveloped land available in the district, infrastructure considerations, and other factors capable of influencing growth.

Based on this review, which includes discussions with municipal and school officials, and as necessary, county and/or regional planners, representatives of the State Department of Environmental Protection, real estate brokers, developers, and others knowledgeable in these matters, PEL projects districtwide enrollments by grade for the next 10 years. The resulting report with appropriate tabular and graphic support serves as a base for informed decision-making with respect to future school district classroom, staffing, program, and operational needs.

The attached proposal describes the scope, time frame, and cost of the study the district has requested. As it indicates, PEL is prepared to begin this study as early as February 4, 2019, and would expect to issue a full draft report within four months of the project's initiation. The cost of the project will be \$16,500. PEL reserves the right to withdraw or alter this proposal if it is not favorably acted upon by the district within 60 days.

It should be noted that the scope of PEL's cost proposal does not include projections of district enrollments for each school building for a minimum of 10 years, as outlined in the district's Request for Proposal (Item 1.7.). Our experience has shown that accurate projections of public school enrollments for periods of 10 years are difficult, at best, because of so many unpredictable variables. In addition, the difficulty of generating reliable projections increases as the focus moves from a school district as a whole down to individual buildings with in a district. Numerous data, methodological, and other limitations (including the relatively small "sample size") encountered when projecting enrollments for multiple elementary buildings using the same techniques relied upon for producing the districtwide figures do not result in the same level of accuracy. We find that per building projection results do not always meet our accuracy standards and, therefore, may be unacceptable for long-term planning of district facilities. We would encourage the district to discuss the impact per building projections will have on increasing the project's cost and overall accuracy.

Further, the scope of this proposal has other exclusions to the district's requested scope of work and these are indicated within the proposal.

We have enclosed, as part of the proposal, background information on the Pennsylvania Economy League that highlights some of the other services provided by PEL, lists a cross section of our school district projects and clients, and includes the profiles of the key staff members who would be involved in this project.

If the Gettysburg Area School District accepts the terms of the enclosed proposal, please sign and return it as soon as possible.

If you have any questions after reviewing the proposal or wish to receive additional information on the nature of the proposed study, please call me.

Sincerely,



Gerald E. Cross
Executive Director

**A Proposal to
Provide a Comprehensive Analysis of
Demographics, Housing and Related Activities, and
Other Relevant Factors and Generate Aggregate
Districtwide Projections of K-12 Enrollments in
the Gettysburg Area School District**

Submitted for the Consideration of the
Administration and School Board of the
Gettysburg Area School District

Prepared by:

Pennsylvania Economy League, Central PA, LLC
88 North Franklin Street, Suite 200
Wilkes-Barre, PA 18701-1393

November 27, 2018

**A Proposal to
Provide a Comprehensive Analysis of
Demographics, Housing and Related Activities, and Other Relevant Factors
and Generate Aggregate Districtwide Projections of K-12 Enrollments
in the Gettysburg Area School District**

I. PURPOSE

The purpose of this proposal is to define the study's objective and the scope of services to be provided by the Pennsylvania Economy League, Central PA, LLC (PEL), to the Gettysburg Area School District (district) relative to a comprehensive analysis of demographics, housing and related activities, and other relevant factors and the projection of aggregate districtwide K-12 enrollments and the terms and conditions under which they would be provided.

II. OBJECTIVE

The objective of the proposed study is to determine the future pattern of K-12 enrollments in Gettysburg Area with a view to providing a base of reliable data for use by district administrators and board members, and the general public in making important decisions regarding the district's future classroom, staffing, program, and operational needs.

III. SCOPE OF SERVICES

In order to accomplish the objective of the study, PEL will perform the following major items of work (which are enumerated in the attached outline):

- A. Review population trends, birth patterns, migration patterns (using U.S. Census data, annual births, and district-provided K-12 enrollment figures), the proportion of children involved in non-district schools and educational programs (for example, private/parochial schools, home schools, charter schools, cyber schools, full-time area career and technical centers, full-time Intermediate Unit programs—even if educated in district classrooms assigned to the Intermediate Unit, other full-time out-of-district programs, state owned schools, full-time consortium-operated alternative schools, juvenile correctional facilities, etc.), and historical K-12 enrollment trends.
- B. Review housing and related activities including the annual number of building and/or occupancy permits issued for new and/or rehabilitated housing units during the recent past; new housing developments and related activity recently completed and underway or planned; turnover in existing housing; the relationship of

children to housing units; the amount of undeveloped land available in the district; infrastructure considerations; and other factors capable of influencing growth.

- C. To the extent possible, organize data on planned dwelling unit construction by various attendance areas in order to give the district a clear indication of where planned new housing unit activity—by number and by type—will be concentrated over the next several years. Similarly, population and birth data will be presented for each of the district’s municipalities.
- D. Provide aggregate districtwide K-12 enrollment projections by grade and current grade alignment for the next 10 years. These projections will incorporate the recent experience in the district with respect to cohort survival rates and pupil progression and will be strongly influenced by the various demographic, birth, housing, and related information that will be analyzed as part of Work Items A. and B.

IV. EXCLUSIONS TO THE REQUEST FOR PROPOSAL

- A. **Item 1.7** The scope of PEL’s proposal does not include projections of district enrollments for each school building for a minimum of 10 years, as outlined in the district’s Request for Proposal. Our experience has shown that accurate projections of public school enrollments for periods of 10 years are difficult, at best, because of so many unpredictable variables. In addition, the difficulty of generating reliable projections increases as the focus moves from a school district as a whole down to individual buildings with in a district. Numerous data, methodological, and other limitations (including the relatively small “sample size”) encountered when projecting enrollments for multiple elementary buildings using same techniques relied upon for producing the districtwide figures do not result in the same level of accuracy. We find that the results do not always meet our accuracy standards and, therefore, may be unacceptable for long-term planning of district facilities. We would encourage the district to discuss the impact per building projections will have on increasing the project’s cost and overall accuracy.
- B. **Items 1.1; 1.2; 1.3, 1.5; 1.6**
 - 1. Item 1.1. The scope of this proposal does not include detailed consideration of “wealth” or “any distinguishing characteristics that will have an impact on facilities”;
 - 2. Items 1.2 and 1.3. PEL staff will meet with local municipal planners, regional planners, “all municipal Planning Commissions”, the Adams County Planning Commission, and realtors only as necessary if unusual circumstances exist. Under Section III of this proposal, PEL staff will meet with representatives of each district municipality which may include planning officials as part of the comprehensive analysis.

3. Item 1.5. The proposed analysis will recognize trends in charter, cyber charter, home schools, and nonpublic school enrollments based on data provided by the school district, however the analysis will not project future enrollments for these types of educational programs and schools.
4. Item 1.6. The proposed analysis will not review the reliability of enrollment projections generated by the Pennsylvania Department of Education.

V. FINAL REPORT

The final report presented to the district's Board of School Directors and administrators will include PEL's findings and conclusions with appropriate graphic and tabular presentation. PEL will provide the district with five copies of its written report upon completion of the study, as well as an Adobe PDF document on CDROM. Additional bound report copies will be provided at a charge of \$15 per copy to cover production and shipping costs. PEL will make itself available for a single public meeting/presentation on the substance of the draft or final report.

VI. DATA TO BE FURNISHED TO PEL

All information, data, reports, records, and other documents necessary for carrying out the above items of work are to be furnished to PEL without charge by the Gettysburg Area School District and/or its agent(s), and in the case of building permits and related information, the municipalities that form the district. Data to be provided by the district shall include, but not be limited to, consistent and compatible historical enrollment figures for school years 2008-09 through 2018-19 (by grade) that were due at the Department of Education by October 15 of the respective years. PEL would also need consistent, compatible, and reliable aggregate figures by grade for district children enrolled in private/parochial schools, charter schools, cyber schools, home schools, full-time career and technical centers, full-time intermediate unit special education programs (even if educated in district classrooms assigned to the intermediate unit), other out-of-district special education programs, state-owned schools, full-time consortium-operated alternative schools, and juvenile correctional institutions—for school years 2008-09 through 2018-19. If essential information cannot be provided to PEL by the district within 30 days of the project initiation date, the timetable may have to be altered accordingly. Similarly, failure of the district, its agents, or its municipalities to provide all data requested may preclude PEL from completing all phases of this project as proposed. Any charges to PEL by third parties for services or materials deemed necessary for the successful completion of this examination will be passed through to the district—provided PEL receives the prior written approval.

VII. COOPERATION OF THE SCHOOL BOARD, STAFF, AND/OR AGENT(S)

It is understood that the successful completion of the study in the time period proposed herein will require the full cooperation of the school board, its staff, and/or its agent(s), and representatives of the district's member municipalities, and others whose data and judgments are needed, and that such cooperation will be provided to PEL. To help ensure this cooperation, the district will send a letter of introduction to each of its member municipalities within two weeks of the initiation of the project and provide PEL with the names, phone numbers, and addresses of appropriate individuals in order to facilitate personal or telephone interviews.

VIII. TIME OF PERFORMANCE

PEL is prepared to begin this study as early as February 4, 2019, and would expect to issue a full draft report within four months of the project's initiation. Any inordinate delay in authorizing PEL to proceed with this project may jeopardize our ability to complete it within the time frame outlined, as would any delay caused by failure to receive necessary data in a timely manner or by any other circumstances that are beyond our control.

IX. COMPENSATION

All charges for this enrollment projection study as outlined will total \$16,500 unless PEL is charged by a third party for data needed to successfully complete its assignment in which case these costs would be passed on to the district as indicated in Section VI of this proposal. Payments to PEL for services rendered will be made upon submission of statements at appropriate intervals in the course of the study.

X. THE ORGANIZATION AND ITS STAFF

The Pennsylvania Economy League has been in the business of assisting state and local government officials and the general public in Pennsylvania since 1936. PEL is an independent nonprofit corporation, organized to achieve more effective and economical state and local government in Pennsylvania. To accomplish its purpose, PEL conducts research and analyses and provides technical assistance involving government programs, organization, management, and financing, and makes the results available to both public officials and citizens to aid them in arriving at informed and intelligent public policy decisions.

PEL associates Jane Thompson and Charles Watters under the direction of Gerald Cross will be primarily involved in the project. Other Central Division staff including David Davare Ph.D. and Patricia Moorhead will be utilized as required, and the entire PEL

statewide professional staff would be available as needed. The profiles of the key personnel are attached.

XI. WITHDRAWAL OF PROPOSAL

PEL reserves the right to withdraw this proposal if it is not favorably acted upon by the Gettysburg Area School District within 60 days.

XII. MODIFICATIONS

This agreement can be modified only with the written approval of both parties.



_____ We Concur With This Proposal as Submitted

Signed for the Gettysburg Area School District: _____

Title: _____

Date: _____

**PENNSYLVANIA ECONOMY LEAGUE
CENTRAL PA DIVISION**

**OUTLINE OF COMPREHENSIVE ANALYSIS OF DEMOGRAPHICS, HOUSING AND
RELATED ACTIVITIES, AND OTHER RELEVANT FACTORS AND PROJECTIONS
OF AGGREGATE DISTRICTWIDE K-12 ENROLLMENTS
IN THE GETTYSBURG AREA SCHOOL DISTRICT**

I. General Characteristics and Community Development

- A. Population Trends, Estimates, and Projections—1990 to 2020, by Municipality
- B. Trend in Housing Units—1990 to 2010, by Municipality
- C. New Housing Units Authorized by Permit—2010 to Most Recent, by Municipality
- D. Ongoing and Proposed Residential Subdivision and Related Activity, by Municipality and Building Attendance Areas
- E. Available Land, Zoning Provisions, and Infrastructure Considerations, by Municipality
- F. Relationship of Population, Housing Units, and Enrollments—1990 to Most Recent
- G. Relationship of Public School Pupils to Housing Units—1990 to Most Recent
- H. Related Considerations

II. Birth Patterns

- A. District Birth Trends—1990 to Most Recent, by Municipality
- B. District Birth Trends in Relation to County Birth Trends—1990 to Most Recent
- C. Trends in Births Per 1,000 Residents and 1,000 Housing Units—1990 to Most Recent
- D. Related Considerations

III. Migration Patterns

- A. Natural Change in Population—1990 to Most Recent
- B. Migration Patterns of School-age Population Based on:
 - 1. U.S. Census Figures—1990, 2000, 2010, and Most Recent Estimates
 - 2. District Children Enrolled in Schools and Educational Programs Other Than Those Operated Directly by the District (For Example, Private/Parochial Schools, Home Schools, Charter Schools, Cyber Schools, Full-time Area Career and Technical Centers, Full-time Intermediate Unit Programs—Even if Educated in District Classrooms Assigned to the Intermediate Unit, Other Full-time Out-of-District Programs, State-owned Schools, Full-time Consortium-operated Alternative Schools, Juvenile Correctional Institutions, etc.)—Past 10 Years
 - 3. Actual Enrollment Figures—Past 10 Years

- C. Relationship of Cumulative Births to Public School Enrollments—Past 10 Years
- D. Related Considerations

IV. Enrollment Trends and Projections

- A. K-12 Enrollment Trends by Grade Organization—Past 10 Years
- B. Trend in District Residents Attending Schools and Educational Programs Other Than Those Operated Directly by the District (Private/Parochial Schools, Home Schools, Charter Schools, Cyber Schools, Full-time Area Career and Technical Centers, Full-time Intermediate Unit Programs—Even if Educated in District Classrooms Assigned to the Intermediate Unit, Other Full-time Out-of-District Programs, State-owned Schools, Full-time Consortium-operated Alternative Schools, Juvenile Correctional Institutions, etc.)—Past 10 Years
- C. Description of Projection Methodology
- D. Changes in K-12 Grade Progression Ratios, by Grade Organization—Past Five Years
- E. Kindergarten Enrollments in Relation to Births Five Years Prior—Past Five Years
- F. Aggregate Primary Districtwide K-12 Enrollment Projections (Next Five Years), by Grade Organization
- G. Aggregate Extended Districtwide K-12 Enrollment Projections (Subsequent Five Years), by Grade Organization
- H. Perspective on Accuracy

**PENNSYLVANIA ECONOMY LEAGUE
CENTRAL PA DIVISION**

SCHOOL-RELATED RESEARCH ACTIVITIES

The Pennsylvania Economy League is a nonpartisan, nonprofit organization that for more than 75 years has been helping state and local government officials meet the increasingly complex demands placed upon them. PEL has a long tradition of involvement in matters relating to public school planning, management, and finance. In terms of the broad issues, PEL helped to develop Pennsylvania's first major school subsidy revision (by serving as the staff of the Lawrence Commission) and similarly assisted the Scranton Commission on School Finances in significantly modernizing the plan. Subsequently, PEL reviewed and analyzed various subsidy proposals at the request of the Governor, the Pennsylvania General Assembly, and/or the Department of Education. PEL has also been involved in tax reform efforts over the years; was very active in the movement to reorganize school districts during the 1960s and prior; and in 1981 was commissioned by the State Senate to assess the administrative, operating, and financial impact of 30 state and federal mandates on school districts. In 1996 PEL completed a similar analysis focusing on school districts in southeastern Pennsylvania.

In 2001 PEL developed the content for the Pennsylvania Department of Education's *School Finance 101* website. PEL's role was to produce a primer highlighting the key issues associated with the financial operations of public school districts in Pennsylvania with a view to identifying how districts generate their financial resources and the purposes for which they are used. The website was designed to help citizens and decision-makers better understand the key concepts of public school finance in the Commonwealth.

With respect to individual school districts, PEL has undertaken more than 200 comprehensive analyses of demographics, housing and related activity, and other relevant factors and generated projections of district enrollments by grade covering periods of up to 10 years. PEL has also examined districts' building utilization patterns; assisted districts in reducing tax collection costs and in making tax collection efforts more effective; aided in personnel matters ranging from developing job classification and pay plans to helping districts prepare for fact finding involving organized employees; and reviewed school operations and various aspects of their finances to provide blueprints for short- and long-term financial, staffing, program, and operational decision-making.

The common theme of all of PEL's work is to provide facts and objective analyses to public officials and the general public so that sound public policy decisions can result. As a nonprofit organization, PEL has been widely recognized for its independence and as being free of partisan considerations, vested interests, profit motivation, or other factors that can often be perceived as clouding government decision-making.

The following pages provide a partial listing of PEL's school-related research activities.

Collective Bargaining Fact Finding Services:

Ridgway School District – October 2017
Coatesville Area School District – March 2017
Red Bank Valley School District – October 2016

Enrollment Trends and Projections:

Tuscarora School District – (Underway)
Eastern Lancaster County School District (Update) – (Draft Submitted)
Fleetwood Area School District – (Draft Submitted)
Clearfield Area School District – January 2018
Chambersburg Area School District – August 2017
Palmyra Area School District – December 2016
Harrisburg School District – October 2016
Pennridge School District (Update) – January 2016
Eastern Lancaster County District School District (Update) – April 2015
Boyertown Area School District (Update) – February 2015
Methacton School District – January 2015
East Penn School District – October 2014
Easton Area School District – August 2014
Lebanon School District (Update) – June 2014
Radnor Township School District – January 2014
Tredyffrin-Easttown School District (Update) – January 2014
York Suburban School District (Update) – January 2014
Central York School District (Update) – January 2014
Abington School District (Update) – December 2013
Eastern Lebanon County School District (Update) – September 2013
Chambersburg Area School District (Update) – March 2013
Norristown Area School District – February 2013
Council Rock School District (Update) – February 2013
Palmyra Area School District (Update) – December 2012
Souderton Area School District (Update) – March 2012
Middletown Area School District – March 2012
Mechanicsburg Area School District (Update) – January 2012
Pennridge School District (Update) – December 2011
Eastern Lancaster County School District (Update) – December 2011
Boyertown Area School District (Update) – October 2011
Northeastern School District (Update) – May 2011
Wissahickon School District (Update) – January 2011
North Schuylkill School District – January 2011
Quakertown Community School District – August 2010
Avon Grove School District (Update) – April 2010
West York Area School District – January 2010
Pennridge School District (Update) – June 2009
Bristol Township School District – February 2009
Central Bucks School District – January 2009
Upper Merion Area School District (Update) – July 2008
Central York School District (Update) – July 2008
Danville Area School District – June 2008
Wellsboro Area School District – March 2008
Crestwood School District (Update) – February 2008
Wilson School District (Update) – February 2008

Enrollment Trends and Projections (continued):

Ephrata Area School District – December 2007
Blue Mountain School District (Update) – November 2007
Avon Grove School District (Update) – July 2007
Palmyra Area School District (Update) – May 2007
Northern Lehigh School District – May 2007
Northwest Area School District – May 2007
Central Dauphin School District (Update) – May 2007
Eastern Lebanon County School District – April 2007
Council Rock School District – March 2007
Upper Merion Area School District – February 2007
Gettysburg Area School District – January 2007
Conewago Valley School District – January 2007
Lebanon School District – November 2006
Donegal School District – November 2006
Tredyffrin-Easttown School District (Update) – May 2006
Mechanicsburg Area School District – March 2006
Central York School District (Update) – March 2006
Eastern Lancaster County School District – January 2006
Pennridge School District – January 2006
Chambersburg Area School District – January 2006
Brandywine Heights School District – December 2005
South Western York School District – July 2005
Coatesville Area School District – July 2005
Manheim Township School District – June 2005
Solanco School District – May 2005
Stroudsburg Area School District (Update) – May 2005
Tredyffrin-Easttown School District (Update) – April 2005
Spring-Ford School District (Update) – April 2005
Avon Grove School District (Update) – March 2005
Wilson School District (Update) – March 2005
Muhlenberg School District (Update) – March 2005
Allentown School District – February 2005
Cornwall-Lebanon School District - February 2005
Great Valley School District (Update) – January 2005
Northeastern York School District – December 2004
Upper Perkiomen School District – November 2004
York Suburban School District – November 2004
South Middleton School District – June 2004
Hamburg Area School District – June 2004
Palmyra Area School District – April 2004
Souderton Area School District (Update) – February 2004
Dallastown Area School District (Update) – December 2003
Great Valley School District (Update) – November 2003
Keystone Central School District – September 2003
Wyoming Area School District – April 2003
Harrisburg School District – April 2003
Kennett Consolidated School District – April 2003
Abington School District – March 2003
Red Lion Area School District – January 2003
Spring-Ford Area School District (Update) – January 2003

Enrollment Trends and Projections (continued):

Avon Grove School District – June 2002
Northampton Area School District (Update) – May 2002
Upper Darby School District – March 2002
Wilkes-Barre Area School District – March 2002
Penn-Delco School District (Update) – February 2002
Wilson School District (Update) – February 2002
Central York School District (Update) – February 2002
Neshaminy School District – May 2001
Tredyffrin-Easttown School District (Update) – May 2001
Interboro School District (Update) – May 2001
Souderton Area School District (Update) – May 2001
Blue Mountain School District (Update) – March 2001
Colonial School District (Update) – March 2001
Central Dauphin School District (Update) – February 2001
Stroudsburg Area School District – December 2000
Eastern Lancaster County School District (Update) – December 2000
Greater Johnstown School District – December 2000
Saucon Valley School District (Update) – December 2000
Wissahickon School District – November 2000
Bellefonte Area School District – February 2000
Fleetwood Area School District (Update) – January 2000
Dallastown Area School District (Update) – December 1999
Whitehall-Coplay School District – December 1999
Pequea Valley School District – November 1999
Lancaster School District – September 1999
Oley Valley School District – July 1999
Penn Delco School District – July 1999
Muhlenberg School District (Update) – June 1999
Twin Valley School District (Update) – March 1999
Halifax Area School District – December 1998
Great Valley School District – December 1998
Conestoga Valley School District (Update) – December 1998
Loyalsock Township School District – December 1998
Spring-Ford Area School District (Update) – August 1998
Penn Cambria School District – August 1998
Coatesville Area School District (Update) – August 1998
Tredyffrin-Easttown School District (Update) – April 1998
Cumberland Valley School District – April 1998
Central York School District (Update) – February 1998
Central Dauphin School District (Update) – December 1997
Bangor Area School District – November 1997
Nazareth Area School District – July 1997
Carlisle Area School District – July 1997
Chester-Upland School District – June 1997
Radnor Township School District – June 1997
Souderton Area School District – April 1997
Exeter Township School District – April 1997
Interboro School District – March 1997
South Middleton School District – February 1997
Northampton Area School District (Update) – February 1997

School Facilities Utilization:

Keystone Central School District – September 2003
Montgomery Area School District – October 1997
Nazareth Area School District – July 1997
Colonial School District – July 1996
Wyoming Valley West School District – May 1994
Coatesville Area School District – December 1992
Keystone Oaks School District – December 1992
Crawford Central School District – April 1991
Keystone Central School District – March 1991
Beaver Area School District – October 1990
Blairsville-Saltsburg School District – April 1990
Brownsville Area School District – April 1990
Greater Latrobe School District – April 1989
Mars School District – March 1989
Derry Area School District – January 1989
Scranton School District – February 1989
Saucon Valley School District – May 1989
Reynolds School District – June 1988
Steel Valley School District – December 1987
Burrell School District – March 1987

Fiscal and Operational Analyses:

Penn Cambria School District – September 1998
Keystone Central School District – March 1991
Beaver Area School District – October 1990
Philadelphia School District – October 1990
Tyrone School District – June 1990
Williamsport Area School District – December 1989
Scranton School District – February 1989
Norristown Area School District – June 1988
Reynolds School District – June 1988
Centennial School District – November 1987
Chichester School District – October 1987
Steel Valley School District – March 1987
Lower Dauphin School District – December 1985
Easton Area School District – October 1985

Analysis of Tax Trends and Potential Yields:

Sayre Area School District – November 1996
Cheltenham Township School District – December 1992
Radnor School District – December 1992
Hatboro-Horsham School District – December 1992

Examinations of Tax Collection Policies, Procedures, and Costs:

Sayre Area School District – November 1996
Yough School District – February 1987
Beaver Area School District – December 1984
Pleasant Valley School District – November 1991
Wilksburg School District and Borough – October 1985
Derry Township School District – November 1984 and November 1980

Personnel Related Studies:

Elizabethtown Area School District (Update) – May 2003
Lampeter-Strasburg School District – October 1999
Waynesboro Area School District – September 1999
Conestoga Valley School District (Update) – June 1999
Northern Lebanon School District – January 1999
Conestoga Valley School District – April 1998
Elizabethtown Area School District – December 1997
West Shore School District – February 1996
Palmyra Area School District – September 1994
Comparative Analysis of Total Compensation of Public School Teachers
and Comparable Private Sector Jobs in Delaware and Chester Counties – February 1993
Comparative Analysis of Total Compensation of Public School Teachers
and Comparable Private Sector Jobs in Lehigh County – June 1992
Burgettstown School District – December 1991
Comparative Analysis of Total Compensation of Public School Teachers
and Comparable Private Sector Jobs in York County – February 1991
West Shore School District – February 1990
Philadelphia School District – March 1988
Chichester School District – October 1987
West Shore School District – May 1987

Other Projects:

Pennsylvania Department of Education: *School Finance 101* Website – August 2001
Lehigh Valley School Districts and Intermediate Units: Opportunities for
Sharing of Services – October 1999
Troy Area School District: Analysis of Cost and Impact of Various Building
Proposals – December 1997
Williamsport Area School District: Analysis of Cost and Impact of Various
Building Proposals – September 1996
Fox Chapel and Riverview School Districts: Consolidation—Intercommunity
Strategic Planning – June 1993
Richland and Forest Hills School Districts—Intercommunity Strategic Planning –
June 1993
Center Area and Monaca School Districts—Merger Study – 1993
Shenango Valley School District Cooperation – August 1992

PENNSYLVANIA ECONOMY LEAGUE STAFF PROFILE

Gerald E. Cross

Executive Director

Central PA Division

Education:

B.A. - Government, King's College (1976)

M.P.A. - Pennsylvania State University, Capitol Campus (1977)

Experience with PEL:

Joined PEL in 1988. Planned, organized, directed, conducted, reviewed, and/or presented a wide variety of research involving counties, municipalities, school districts, and authorities. These projects have involved budgeting; management and financial analysis; long-range financial and operational planning; productivity improvement; administrative procedures; service options; municipal merger and consolidation; government restructuring and charter drafting; rate structure analysis; personnel and labor relations; and school enrollment projections, among others. Specific projects have included:

Represents PEL as a member of the PA Local Government Commission Task Force on Act 47; Structuring Health Community Research; Act 47 financial recovery plans for the cities of Scranton, Harrisburg, and Nanticoke; models for tax base sharing and revenue sharing in Lehigh Valley; analysis of the impact on the cost and financing of services in host municipalities of the state system of higher education; financial and operational feasibility of the joint delivery of water services in Ephrata Borough and East Cocalico Township; assisting government study commissions in Luzerne, Clinton, and Lancaster counties; consulting for the Government Financial Officers Association (GFOA) in Adams and Blair counties; analysis of the compensation of public school teachers and comparable private sector positions in York County and Lehigh County; the feasibility of merging Temple Borough and Muhlenberg Township, Wyomissing and Wyomissing Hills boroughs, and Mount Penn Borough and Lower Alsace Township; analyzing fire and/or police services in multiple municipalities and Councils of Governments; analyzing financial trends in multiple cities, boroughs, and townships; preparing wage, benefit, demographic, and economic data for arbitration involving Lehigh, Tamaqua, and West Pittston boroughs and Monroe County; and detailed analyses of demographics and projections of enrollments for more than 150 school districts.

Other Professional Experience:

Served as Community Development Director for Forest City Borough, where he was responsible for program management, housing rehabilitation, small business development, industrial development, senior citizens housing, and infrastructure installations. During his tenure Forest City was selected as one of the 100 outstanding community development programs in the country.

Served as Local Government Specialist with the Pennsylvania Department of Community Affairs providing technical assistance to municipalities.

Served as Small Community Advisor for the Pennsylvania Department of Community Affairs and was assigned to the Borough of Forest City.

Served as Assistant Manager for Lemoyne Borough, where he was responsible for assisting in zoning administration, codes enforcement, public works, budgeting, and personnel management.

Mr. Cross is a Board Member and Treasurer of both a municipal and a regional sewer authority and maintains memberships in the Government Research Association and Government Finance Officers Association.

PENNSYLVANIA ECONOMY LEAGUE STAFF PROFILE

M. Jane Thompson, CPA

Research Associate

Central PA Division

Education:

Ms. Thompson earned degrees from West Virginia University and Virginia Tech. She has held an active CPA license in Pennsylvania since 1991.

Experience with PEL:

M. Jane Thompson, CPA, PEL Associate, has over 25 years of experience in public sector accounting, including K-12 and higher education. She served as the Director of Finance for Upper St. Clair School District, for ten years. As part of the PlanCon process for their high school renovations and additions project, she completed enrollment projections that were accepted by the Pennsylvania Department of Education.

In addition to her experience at Upper St. Clair, she spent nine years as Director of Finance for Shippensburg University and has over seven years combined experience with local and national certified public accounting firms. Her public accounting clients were primarily county and municipal governments, school districts and non-profit organizations.

Ms. Thompson assisted with district-wide studies for Daniel Boone Area School District, Methacton School District and a merger study for St. Clair and Pottsville Area School Districts. She designed projected enrollment verses capacity charts that effectively illustrated the over/under capacity of each building over time.

Ms. Thompson led the general ledger implementation of financial management and ERP software in her positions at Upper St. Clair School District and Shippensburg University. She has extensive experience developing procedures for compliance with federal and state grant regulations and improving internal controls. She developed financial models to assist in labor contract negotiations, budgeting and long-term financing projects. As part of a team of professionals, she studied financial issues at Reading School District and developed recommendations for improved processes and controls.

PENNSYLVANIA ECONOMY LEAGUE STAFF PROFILE

Charles W. Watters

Senior Research Associate

Central PA Division

Education:

B.A. - Government, King's College (1968)

M.A. - Political Science, University of Tennessee (1971)

Experience with PEL:

Joined PEL in 1969. Planned, organized, directed, conducted, reviewed, and/or presented a wide variety of research involving counties, municipalities, school districts, and authorities. These projects have involved budgeting; management and financial analysis; long-range financial and operational planning; productivity improvement; administrative procedures; service options; municipal merger and consolidation; government restructuring and charter drafting; rate structure analysis; personnel and labor relations; and public school enrollment projections, among others.

Among the jurisdictions covered by specific projects are Clinton, Dauphin, Lackawanna, Lancaster, Lehigh, Luzerne, Lycoming, Monroe, Northampton, and Schuylkill counties; Altoona, Bethlehem, Harrisburg, Lebanon, Reading, Scranton, Wilkes-Barre, Williamsport, and York cities; Bristol, Edwardsville, Kingston, Mount Penn, Nazareth, Schuylkill Haven, West Hazelton, West Pittston, Wyomissing, and Wyomissing Hills boroughs; the Town of Bloomsburg; Derry, Hampden, Lancaster, Muhlenberg, Plains, Salisbury, Spring, Springettsbury, Susquehanna, and York townships; and the Abington, Antietam, Avon Grove, Bellefonte Area, Blue Mountain, Boyertown Area, Brandywine Heights Area, Bristol Township, Carlisle Area, Central Bucks, Central Dauphin, Central York, Chambersburg Area, Coatesville Area, Colonial, Conestoga Valley, Conewago Valley, Conrad Weiser Area, Council Rock, Crestwood, Cumberland Valley, Dallastown Area, Daniel Boone Area, Danville Area, Derry Township, Donegal, East Lycoming, East Penn, Eastern Lancaster County, Eastern Lebanon County, Easton Area Ephrata Area, Exeter Township, Fleetwood Area, Gettysburg Area, Governor Mifflin, Great Valley, Halifax Area, Interboro, Keystone Central, Lebanon, Lower Dauphin, Manheim Township, Mechanicsburg Area, Middletown Area, Montgomery Area, Muhlenberg, Nazareth Area, Norristown Area, Northampton Area, Northeastern York, Northern Lehigh, North Schuylkill, Northwest Area, Neshaminy, Oley Valley, Penn Delco, Pennridge, Pequea Valley, Radnor Township, Reading, Red Lion Area, Saucon Valley, Schuylkill Valley, Scranton City, Souderton Area, South Middleton, South Western, Spring-Ford, Spring Grove Area, Stroudsburg Area, Troy Area, Tredyffrin-Easttown, Twin Valley, Upper Darby, Upper Merion, Wellsboro Area, West York Area, Whitehall-Coplay, Wissahickon, Wilkes-Barre Area, Williamsport Area, Wilson, Wyoming Valley West, York City, and York Suburban school districts; and the Town of Bloomsburg Municipal Authority, Ephrata Area Joint Authority, and the East Cocalico Township Authority.

Examples of projects range from developing a recovery plan for a financially distressed municipality, to projecting public school enrollments, to assessing the feasibility of merging municipalities, to assessing a community's financial resources, to analyzing service delivery including water service and police and fire protection.

Provided technical assistance to several Act 62 Government Study Commissions including Clinton, Lancaster, Luzerne, and Schuylkill counties and the boroughs of Kingston, Freeland, and Towanda; served as a member of a city charter transition committee; and participated as expert witness in fact-finding and arbitration hearings under Pennsylvania's collective bargaining laws.

Served (concurrent with his PEL position) as Coordinator of Planning Task Force of the Committee for Economic Growth of the Greater Wilkes-Barre Partnership.

PENNSYLVANIA ECONOMY LEAGUE STAFF PROFILE

Patricia Moorhead

Financial Analyst

Central PA Division

Education:

B.S. – Accounting – Wilkes University, Wilkes-Barre, PA

Responsibilities/Experience with PEL:

Joined PEL in 2008. Conducts research and provides advisory services on municipal management, budgeting and finance, capital budgeting and planning, personnel and labor relations, and related matters. Analyze trends and prepare forecast for municipalities throughout Pennsylvania. Work with municipal officials to collect historical data on municipalities. Review contract specifics to determine future costs of current and past negotiations. Consult with experts including lawyers and accountants to determine feasibility of various options. Prepare reports and power point files used to present findings. Prepare reports to compare municipality and school district data. Combine various data sources including state provided and Census data. Identify trends across the Commonwealth. Serves on the Recovery Plan Team for the City of Harrisburg, the City of Scranton, the City of Altoona, the City of Shamokin, the City of Farrell, the City of Duquesne and the Borough of Mahanoy City. Previous municipal studies include the City of Nanticoke, Borough of West Wyoming, the City of Altoona, Plains Township, Lebanon City, the Borough of Gettysburg, and the City of Hazleton. School District work includes Redbank Valley School District Fact Finding and Pottsville Area/St. Clair Area Consolidation Feasibility Study.

Other Professional Experience:

Served as Senior Marketing Analyst, General Accounting/Tax Supervisor, Budget Administrator, Assistant General Accountant, and Accounting Department Administrative Assistant at Frontier Communications. Duties included: Marketing—Customer Segmentation, Sales Targeting, and Campaign Tracking; Finance—Strategic Planning, Forecasting, and ROI Modeling; and Accounting—General Ledger, Accounts Payable and Tax Issues.

PENNSYLVANIA ECONOMY LEAGUE STAFF PROFILE

David W. Davare, Ph.D

Director of Research

Central PA Division

Education:

Ph.D. – Public Administration-Finance, University of Pittsburgh

M.S. – Administration, Duquesne University

B.S. – Business Administration with a minor in Economics, College of Great Falls, MT

Experience with PEL:

Dr. Davare currently serves as Director of Research for PEL's Harrisburg Office.

He was previously employed by PEL as a Regional Manager and Research Associate focusing on financial management and distressed municipality recovery programs.

Other Professional Experience:

Dr. Davare recently served as the Director of Research Services for PSBA. His responsibilities included directing and implementing a program of continuing research support services; assisting in data development, interpretation and application; and directing research staff in providing effective research and data systems through survey research, special studies and consulting with districts. His area of consulting support included fact-finding and arbitration related to financial issues, fiscal health evaluation and tax collection and levy issues, as well as, school operations including merger and shared services, and analysis of student testing. David has authored a number of articles and publications for PSBA related to school finance. Other duties included support for PSBA's Board Training program, presentations on school finance, preparation and presented of testimony on financial and merger legislation before the Pennsylvania Legislature for PSBA.

Other professional experience includes township manager for South Park Township, budget analyst and senior analyst for Allegheny County.

He has also taught courses on public budgeting, public finance and administration and government accounting at several colleges and universities. Additionally, he has taught courses on budgeting and accounting for municipal officials through the former Department of Community Affairs and the Pennsylvania Municipal Training Partnership.