

General Planning Services RFQ Response



Submitted to:
Village of Estero

Submitted by:
ch2m

August 2015



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August 5, 2015

Mr. Peter Lombardi
Interim City Manager
Village of Estero
21500 Three Oaks Parkway
Estero, FL 33928

Subject: General Planning Services RFQ Response

Dear Mr. Lombardi:

For the last year, we at CH2M have watched as the people of Estero have progressed along their journey of independence. First came the campaign for incorporation, then the vote to become a village, finally the election of the Village Council. As we attended the inaugural Council meeting at Estero High School, it was clear that this would be a Village of Vision. It has always been clear that part of that vision was the concept of "Government Lite", and now the Village has expressed an interest in establishing a partnership to outsource the Community Development Department. We are truly grateful to be among those considered to partner with Village of Estero. We would be honored to be part of your continued success.

We also appreciate the importance of this decision and hope we are able, in the brief statement of qualifications, to clearly demonstrate our capabilities, competence, and local presence, as well as our tireless commitment to get the job done to the satisfaction of your constituencies.

Instead of taking the typical approach of barraging you with our past projects and testimonials—although we could easily do that—we decided to explain how our capabilities will enable you to have a General Planning Services team operational quickly and efficiently. We've provided an explanation of our approach that will smoothly and effectively ensure you have Planning and Zoning capabilities up and running by October 1, 2015, and Building Permitting and Inspections by the following January. We know we can do this because we have done it many times before: for instance, we had community development services operational at Peachtree Corners (GA) within 5 weeks of contract finalization.

Of course, startup is only the beginning of what we hope will become a long and fruitful partnership. To be succinct, I can summarize the immediate and long-term benefits that we believe the Village of Estero will receive in their partnership with CH2M.

Expert program management to deliver a fast, smooth startup. Since 2004, *Engineering News Record* has ranked CH2M No. 1 in program management. CH2M has a long legacy of smooth, expedited startups and successfully managing complex and challenging programs for municipal clients. We use an established and proven change management approach for all programs and projects we execute, regardless of size or technical content. Our flexibility and broad-based capabilities in managing projects of all kinds can save Estero money and resources while addressing a vast range of development services.

Municipal community development operations experience to deliver hands-on understanding and knowledge. CH2M operates approximately 172 local government service entities, including utilities, public works, all types of community development activities, and entire city operations. From this work, we have learned to listen to our clients and to tailor our services to the unique interest and desires of the communities we serve. We have also compiled a substantial compendium of best practices, metrics to drive continuous improvement, and work processes that provide value for our clients. This will both quick-start Estero's general planning operations and ensure its long-term success.

Qualified personnel who put their heart and soul into their work, and into the community. CH2M brings not only a compendium of tested methodologies, but also professionals who have worked directly as urban developers, planners, engineers, public works directors, and other city management staff, with firsthand experience in transforming their organizations. The proposed Program Manager, Jay Sweet, has over 30 years of relevant experience, is a local resident, and is ready to put his considerable skills to work on behalf of Estero.

Experience engaging stakeholders in positive ways. Each of the 172 local government operations that CH2M currently oversees functions within a complex environment of shifting political, community, and business influences. Our projects are noted for their ability to maintain positive relationships with internal colleagues, elected officials, customers and other external stakeholders through exceptional performance, forthright and interactive communications, and ongoing transparency.

Respecting the client's vision. CH2M actively engages with each client in the start-up period listening and learning, ultimately developing a work environment and operational model that incorporates the client's vision. We actively engage stakeholders in developing performance metrics and processes to tailor services to reflect the 'local flavor' of how services are to be delivered.

Sustaining your bottom line while safeguarding the planet with environmentally sound practices and sustainable development. As a leader in the industry and one of the first engineering, construction, and municipal services companies to publish a sustainability report, CH2M continues a tradition of excellence and transparency in reporting on internal operations related to sustainability and environmental commitment. Our goal is to manage the impacts of our own operations and apply our company's portfolio of services to help our clients become more sustainable. We are leaders in green construction practices and using sustainability assessment and rating systems to create and support smart cities.

I can most confidently say that no one will work harder to ensure that your goals and objectives are met during startup, and for the many years that we hope to serve the leadership and residents of the Village of Estero.

Please allow me to answer any questions or clarifications that you may have in the attached Statement of Qualifications. I look forward to working with you.

Very truly yours,

CH2M HILL Engineers, Inc.



Jonathan A. Mantay
Director of Municipal and Transportation Facilities

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Summary of Qualifications

We at CH2M welcome this opportunity to showcase our ability and desire to partner with the Village of Estero to quickly establish and ensure the ongoing success of general planning services for the Village's Community Development Department. We will work with you to ensure that these local services remain tied to the heartbeat of the community and capable of fulfilling your long-range vision.

The Village of Estero is on track to realizing its vision. In 2014, its residents demonstrated a strong sense of community, foresight, and pride by voting overwhelmingly to establish the Village.

Now the Village is ready to progress even further on its journey by forming a limited services partnership that will implement the community's vision in a cost-effective manner while ensuring the most important services to residents are kept accessible and under local control. It only requires the right partner.

CH2M has proven systems, processes, people, and highly customizable tools to ensure Estero will be able to expedite its plan to institute accessible, effective community development services under its local control with its own identity. CH2M is the leading "start-up" city partner in the U.S., having successfully launched six municipalities in the southeastern United States over the last decade.

As part of the formation of Georgia's newest city, Peachtree Corners, CH2M successfully established the community's planning, zoning, and code enforcement services within five weeks.

Of course, a smooth and fast start-up process is only the beginning; CH2M understands that every city is unique in their vision, goals and objectives, requiring a tailored approach. CH2M has the reach-back capabilities, a full array of relevant tools and skills, and the flexibility to support the Village's emerging needs with various delivery models. This means that Estero will have in CH2M a partner that will help it address challenges and take advantage of opportunities as they arise. Together, Estero and CH2M will pursue a common community vision.

As your partner, CH2M will assimilate Estero's values and apply them in our daily operations. We will consider ourselves one and the same as The Village of Estero, as we strive to:

- Maintain the high standards of the Village through continuous dedication to service delivery excellence
- Serve your emerging interests and the continued growth of the community, within your overall community development vision
- Maintain essential planning, zoning, code enforcement, permitting and building inspection services, in an efficient and fair manner
- Enhance customer service, simplify development processes and reduce cost through innovation and use of technology

As requested in your Request for Qualifications, the capabilities, adequacy of personnel, past record, experiences, and assigned team members that together distinguish CH2M's ability to quickly and effectively establish and conduct community development services on behalf of Estero are summarized in the following table. These qualities are further described in the subsequent summary of our company and staff qualifications.

The
NUMBERS TELL
the **STORY**

50
Years CH2M HILL has been working with Florida Communities

1,000/40
The number of CH2M staff and Florida clients for whom we work

172
Local governments CH2M serves throughout the U.S.

6
The number of cities started up in Southeast U.S.

25,000+
CH2M employees available to support the program as needed

#1/12
Engineering News Record has ranked CH2M as #1 in program management for the last 12 years in a row

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Required Qualifications	CH2M Distinguishing Characteristics	Section
Capabilities	<ul style="list-style-type: none"> • Uses proven approach for partnering with client cities to mobilize city services in line with vision and goals • Uses award-winning program management approach that has been used to successfully manage start-ups of six cities in the Southeast. • Uses proven methods and templates to expedite the setup of partner services to client satisfaction • Has knowledge of full range of local government services, gained from its 172 public-private partnerships • Has experience with a variety of different plan review software packages to tailor the specification of the client’s unique needs and interest • Uses proven methods to align stakeholder interests, train employees, and ensure ongoing customer satisfaction with established municipal services 	Our mobilization approach, tailored to Estero’s need for expedited start up, is more fully described in Section 1
Adequacy of Personnel	<ul style="list-style-type: none"> • CH2M can recommend a Program staff structure based on its experience, but prefers to work with Estero to select the right number of full-time Program staff with the right qualifications, aligned directly to the Department’s tasks, and level of service needs • CH2M has more than 1,000 professional engineers, technicians, technologists, and others located in Florida who will be available to support the Program staff, as needed • Under the Program Manager, CH2M will set up a target mobilization team to ensure the startup is smooth and on-time 	A summary of the proposed organization structure and assigned and reach-back personnel is provided in Section 2.
Past Record	<ul style="list-style-type: none"> • CH2M currently manages 172 public-private partnerships across the country • For Peachtree Corners (GA), CH2M successfully established the community’s planning, zoning, and code enforcement services within five weeks • Also in Georgia, CH2M set up full municipal operations including community development services for the cities of Johns Creek, Milton, Sandy Springs, Peachtree Corners, and Chattahoochee Hills • In 2005, CH2M successfully set up Building and Development services for the newly-founded city of Sandy Springs, with a population of 98,000, within 100 days • Within Louisiana, CH2M set up full municipal operations including community development services for the city of Central • Within Florida, CH2M currently provides community development services for the city of Bonita Springs 	A summary of three relevant community development service partnerships managed by CH2M is provided in Section 4.
Experience of the Firm	<ul style="list-style-type: none"> • For 30 years, CH2M has been providing a full range of city services, including community development services, throughout the southeast United States • In the region, CH2M right now provides community development services for Johns Creek, Peachtree Corners, and Bonita Springs (FL) 	A summary of CH2M’s experience in both starting up and operating city services within the region is provided in Section 3.
Team Member Qualifications	<ul style="list-style-type: none"> • The proposed Program Manager has more than 30 years of land development experience. He is licensed by the State of Florida as a Professional Surveyor and Mapper (PSM) and by the American Institute of Certified Planners (AICP). His experience runs the gamut of Florida’s growth management and land development regulation. 	A summary of the Program Manager’s qualifications is provided in Section 2. Full resumes of Jay and other key support persons is provided in the Appendix.

Section 1: Capabilities

CH2M has a full range of program setup and management processes that it has used successfully in 172 of its programs across the nation and are ready to put to work for Estero. The key to our success is in understanding what you want and then making sure those objectives are realized in every step of the work plan—from expedited start-up processes to ensuring local attention-to-detail over the long run.

From Planning to Implementation

CH2M rejects the idea of a singular method for mobilizing an organization. Every organization, environment, and neighborhood is unique. This is particularly true in the provision of community development services since those who provide these services are responsible for directly implementing the goals and vision of the community. The characteristics that make the Village distinct cannot be thrown aside in an attempt to operationalize a cookie cutter approach. CH2M has developed and adopted best practices and technologies through our multi-faceted work with other municipal operations, but are always sure to customize them, as needed, for the community in which they are applied. We are not an isolated consultant, but become a member of the community, working under the same values and vision as the Council and residents. We have demonstrated the success of this tailored approach in every one of our 172 public-private partnerships across the country.

Timeline

We understand that it is Estero’s desire to have a limited services agreement in place and operational by October 1, 2015. CH2M is able to facilitate that accelerated timeline, by prioritizing and staging program progress, without sacrificing quality of service. In line with the criteria set for in the RFQ, we will provide Planning and Zoning and Code Enforcement services by October 1, 2015 and Building Permitting and Inspection services on January 1, 2016. The process is summarized in Figure 1.

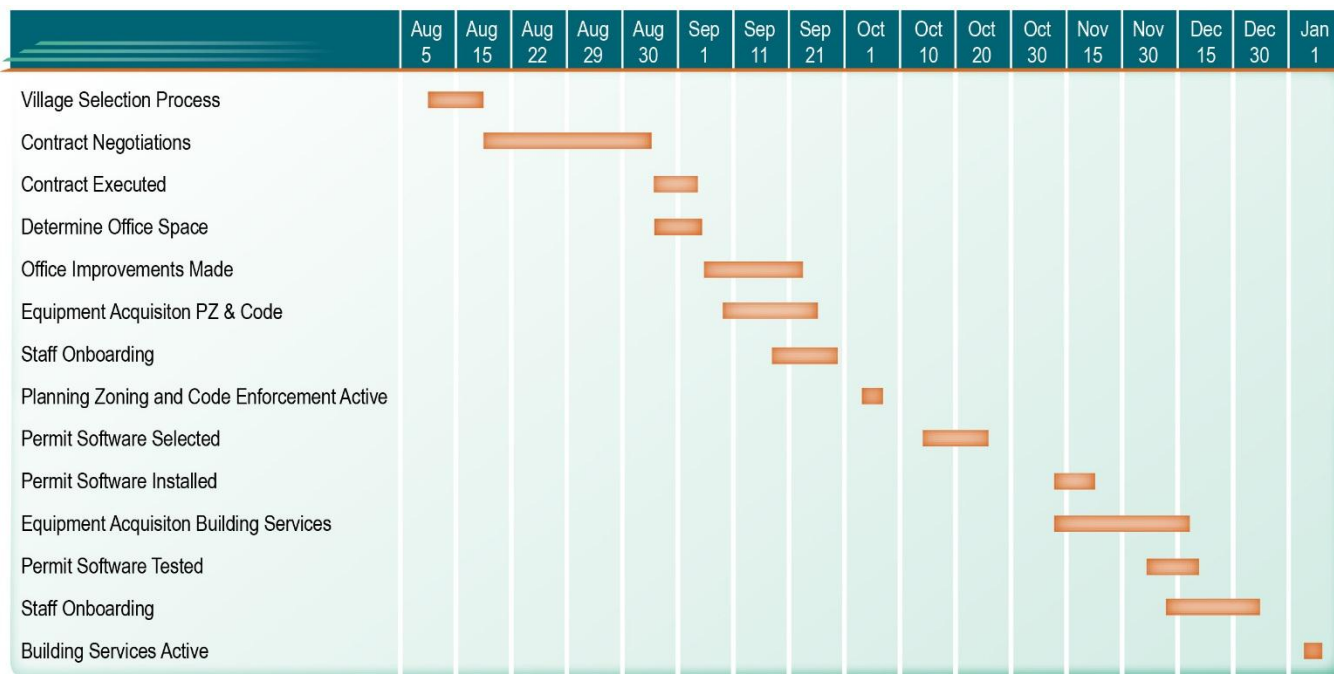


Figure 1. Milestone Table

CH2M has the proven capability of meeting Estero’s start-up timeline, with Planning and Zoning operations up-and-running by October 1, 2015 and Building Permitting and Inspection fully operational by January 1, 2016.

Assuming that contractual activities can be completed by late August or early September, program activities will be initiated immediately with locally based CH2M staff, many of whom are already familiar to Estero. We can confidently state this commitment because of our history in instituting similar services in a short timeframe.

In 2005, CH2M successfully set up Building and Development services for the newly founded city of Sandy Springs, with a population of 98,000, within 100 days. In two months of its operation, we were able to reduce the plan review time from 8 weeks to 3 weeks and completed a substantial backlog of zoning and permitting applications left by the County.

Mobilization Approach

Despite the speed of program initiation, CH2M will be able to ensure that the services provided will attain the quality necessitated by Estero’s high standards. CH2M will employ its program management expertise to set up operations, implement consistent systems and processes along with performance levels established with Estero leadership, engage with existing staff and interested constituencies, and apply its Everyday Excellence quality training with all staff assigned to the newly established department to ensure sustainable benefits to the community. CH2M staff will work with the Village leadership to prepare a detailed work plan at the time of contract award.

The CH2M approach is to establish an appropriate city-based, self-contained program under the direction of the Program Manager. Key elements of our approach are summarized in the following steps.

Chartering

To implement this program efficiently, on time, and without disruption to Estero’s operations, CH2M will start with a thorough chartering process. Prior to the start date, our mobilization process will engage our key resources to prepare for startup. Valuable information gained from our due diligence process will be used to develop a comprehensive and detailed plan, designed to meet the program requirements and objectives. Upon Estero’s written authorization to proceed, we will lead a collaborative alignment strategy session that includes the CH2M start-up team and Estero stakeholders. Our goal is to establish the foundation of our partnership, fully understand the scope of work and Estero’s conditions of satisfaction, define protocols, and communicate the entire program mobilization process.



Key Benefits of CH2M’s Everyday Excellence Quality Program

- Established successful business systems provide reliable service at the lowest possible cost
- Technical assistance for the general planning team will meet and overcome any operational challenges at the Village of Estero
- Standardized procedures will assist with records management, and prevent inconsistencies

Mobilization Plan

After chartering, the partnership will continue the mobilization period, during which we work with Village leadership to institute performance levels, protocols, budget allocations and other key service delivery elements of the general planning services organization into a start-up schedule and detailed work plan.

The start-up schedule outlines the major steps of the start-up. However, the mobilization work plan may have more than 100 detailed line items. It is a document that will be utilized daily by the start-up team and used as a communication tool with the Village stakeholders.

Upon execution of a contract, our mobilization team will focus on securing as much reference information from Lee County as possible. We will gather information from the Village, Lee County, and other governmental agencies to establish a program schedule. Data gathering involves assembly of electronic and paper materials, as well as actual performance data from previous years.

Implementation

Once we establish and initiate our mobilization plan, CH2M will immediately move into the start-up phase, which will involve the transfer of work from Lee County to CH2M. To jumpstart the process, startup involves a series of weekly meetings with the current service providers to plan and coordinate all implementation activities. Necessary adjustments to the schedule and additional coordination meetings will be arranged on an as-required basis. CH2M will strive to maintain this plan and schedule with reasonable allowances made for unforeseen factors.

In partnership with the Village, we will negotiate with Lee County the specifics for the transfer of individual applications in various stages of approval and development. CH2M believes that the County should continue to handle applications and permits for which they have received a fee, unless the application and fee are transferred to the Village for processing.

With an accelerated start-up timeframe, all non-essential historical documents, information, and records will be organized and registered after the start date of October 1, 2015; this will allow us to prioritize appropriate systems. It will also minimize the amount of data transfer necessary during the initial mobilization period and expedite the process without detracting from services provided. We propose negotiating a transfer schedule between the parties during the initial stages of the implementation process.

Task	Duration (Days)
14.0 Inspection, Coding Enforcement and Permitting	338 days
14.1 Records reconnaissance - Fulton County Site Visit	3 days
14.2 Records Recovery - Plan of Action	11 days
14.3 Records Recovery & Digitizing Work	12 days
14.4 Business Planning & Mgmt Software Installed	12 days
14.5 Establish Office Space and Work Areas	1 day
14.6 Key Staff Starts: Asst. Directors	16 days
14.7 Organize "Procedures" for site development, land disturbance, building permit	12 days
14.8 Staff Level 2 - start up	14 days
14.9 Draft proposed ordinances for adoption of soil erosion control, building codes, h	43 days
14.10 Establish organization, reporting structure and roles and responsibilities	43 days
14.11 Establish office space and work areas	43 days
14.12 Establish and communicate work policies and procedures	27 days
14.13 Establish organization, reporting structure, roles and responsibilities.	8 days
14.14 Organize "Applications & Inspections Reports" for site development, land distu	65 days
14.15 Establish and communicate work policies and procedures	4 days
14.16 Start up inspections, code enforcement, and permitting website	4 days
14.17 Submit draft ordinances for review (City Attorney designate)	11 days
14.18 Provide building & site inspection	
14.19 Start - Code Enforcement inspection	
14.20 Start - Site Development and Building	23 days
14.21 Establish Safety program and provide on	12 days
14.22 Accept applications for building permits, land disturbances, site	16 days
14.23 Staff at Full Level	16 days
14.24 Mayor & Council adopts initial inspection, code enforcement and permitting or	2 days
14.25 Begin official enforcement & citations for code enforcement (legal adoption)	2 days
14.26 Mayor, Council & Operating Staff Retreat in Athens, GA	1 day
14.27 Planning & Zoning Retreat for Mayor, Council, Adjointed Boards, Staff and St	287 days
14.28 Planning & Zoning Operations On-going	

CH2M's mobilization strategy is proven to make startup fast and effective

Service Delivery

The result of careful planning and execution of the general planning services department will result in a smooth transition process of service delivery. All services will be operational by set dates, as shown in the following table.

Start Date	Office	Accountabilities
October 1, 2015	Planning and Zoning	• Code Enforcement
		• Contractor Licensing
		• Development Review
		• Environmental Review and Enforcement
		• Zoning
		• Planning
		• Transportation Review
		• Historic Preservation
January 1, 2016	Building Permitting and Inspection	• Board of Adjustment and Appeal
		• Building Permitting
		• Plan Review
		• Floodplain Review
		• Building Inspections

General Planning Services

CH2M has a proven record of providing high-quality general planning services for its local government clients. Our strong local presence and our understanding of Lee County's procedures and practices will provide the Village of Estero with a staff that is capable of quickly converting the County's workflow policies to those that will best implement the Village of Estero's vision for the community. CH2M has extensive experience in:

- Comprehensive and neighborhood planning
- Rezoning and special exceptions
- Historic presentation
- Environmental assessment
- Public outreach
- Geographic Information Systems

Our staff has both private sector and governmental experience. This along with our knowledge of Florida Planning regulations provides Village with a staff capable of supporting all of the Village's needs.



CH2M utilizes state-of-the-art LIDAR technology in Peachtree Corners to gather a complete inventory of the city's assets (roads, streetlights, drainage, and more).

Code Enforcement Services

Our approach to code enforcement is determined by the community we work for. While some cities desire a proactive, staff-driven enforcement; others prefer a more reactive, complaint-driven approach. We anticipate that the Village would want:

- Weekend enforcement
- Extended daytime hours
- Accelerated resolution of violations

Additional services often included within code enforcement:

- Contractor licensing
- Occupational licenses
- Rental unit licensing

The depth and breadth of the services we provide should be those that promote the Vision of the Village.

Building Permitting and Inspection

There are many programs available to facilitate the electronic plan review process. CH2M is not tied to any one of them and uses a variety of community development/planning software packages across its service delivery programs, according to the wishes of their local government partners. We propose that prior to November 1, CH2M and the Village review and agree upon a software package that will meet the needs and desires of the Village.

Ongoing Excellence

At CH2M, quality is an endless quest for improvement focused on empowering employees, exceeding customer expectations, and enhancing our environment.

We use quality tools that emphasize, promote, and encourage teamwork for problem prevention and solving. This ensures that the services provided to Estero will consistently meet established performance expectations and remain in tune with community challenges and opportunities. Specifically, CH2M's Everyday Excellence Quality Process promotes improvement in all facets of operations. Focused on our E3 motto (Enhance the environment, Empower our employees, Exceed our customers' expectations) excellence is achieved through:

- **Aligned Strategy Deployment** – At the outset of the program, our team makes sure that operations are aligned to the Village's overall community vision and development plan.
- **Customer Awareness** – Our quality team performs annual client surveys to inform internal decision-making and make certain our services are in tune with your needs.
- **Employee Education and Empowerment** – Our unique quality coaching team provides on-site training that results in engaged employees who are 'paid to think' and develop new approaches in how they perform their jobs.

Customer Service

Customer service is the hallmark of any partnership and we believe it begins during the start-up process. During the mobilization and implementation period, our team will remain engaged with the Village staff ensure that expectations are ingrained into performance standards. Then, on an ongoing basis, CH2M will exceed the expectations of your residents, by initiating an ongoing customer service regimen, including:

- Addressing customer complaint calls in a timely manner and performing root cause analysis to resist recurring issues
- Analyzing, documenting, and tracking complaint calls, helping to identify specific problems and allowing us to identify and correct target areas before they become problem areas
- Employing an integrated outreach program with residents and community interest groups, allows ongoing identification of needs, opportunities, and customer priorities

Starting from mobilization, a keystone of the CH2M approach is to continually strive for improvement in service levels and the efficiency. Through our understanding of the local area, by recognizing Estero's unique nature, and by combining innovation and technical capability, we will take the services received by the residents to a level that will allow the Village to grow, thrive, and succeed.

Section 2: Personnel Adequacy and Qualifications

More than technology, more than business systems and processes, the CH2M pool of community development and other experts available to Estero will be the key to attaining a timely and smooth mobilization and implementation process, as well as shape the direction of the project in the years to come. Our proposed team has the skills and knowledge necessary to fulfill the functions required by Estero and to get them up-and-running in the shortest amount of time.

Program Team

One of the most important decisions we made while preparing this statement of qualifications is in selecting individuals who could best meet Estero’s needs. We want to be able to maintain local control and perspective, but also to retain an agility that will allow us to quickly respond to arising opportunities and tasks. We have therefore carefully constructed an organization which provides the best of both worlds: full time local direction, backed by a full contingent of on-call specialists.

We have carefully selected **Jay Sweet** as Program Manager to lead the CH2M team based upon his local knowledge, Building, Planning and Zoning, and Code Enforcement expertise, and applicable licenses, as well as his ability to meet the tight timeframe of establishing the new operations. In addition to the staff specifically selected for this project, Mr. Sweet will be directly supported through our Florida Offices and by our 1,000 Florida employees, as well as having access to the full complement of CH2M resources throughout the world.

Program Manager

Jay Sweet has more than 30 years of land development experience. He is licensed by the state of Florida as a Professional Surveyor and Mapper (PSM) and by the American Institute of Certified Planners (AICP). His experience runs the gamut of Florida’s growth management and land development regulation.

Starting in the earlier 1980s, while working for local government, Jay oversaw code enforcement and animal control. After the 1983 growth management laws were adopted and Florida municipalities were required to bring their land development regulations in to compliance with their adopted Comprehensive Plans, Jay prepared Zoning Regulations ensuring compliance with state mandates. Mr. Sweet has also reviewed many Comprehensive Plans and prepared evaluation and appraisal reports for all area of Florida growth management law since 1983.

From the mid-1990s to the early 2000s, Mr. Sweet’s career was focused in the areas of engineering and surveying, including the completion of the Palm Beach International Airport (PBIA) – I-95 Connector project. As the Geometric Manager he was responsible the location of 14 segmental bridges, five cast in place bridges, and 15 lane kilometers of paving.

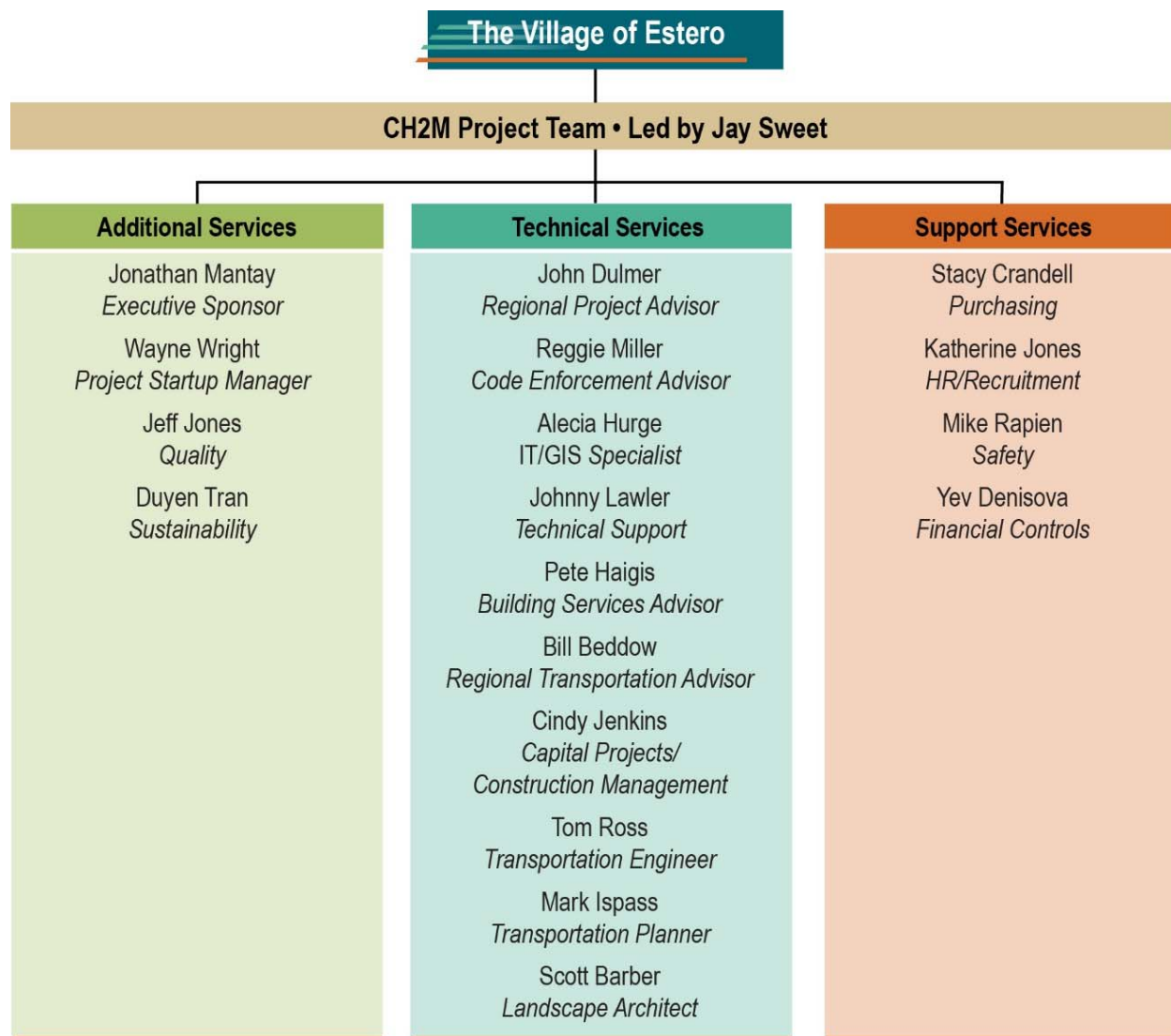
Since joining CH2M, Mr. Sweet has worked in the Bonita Springs project as both the City Surveyor and Land Planner. He has been integral in creating the framework for the Downtown redevelopment effort and was the architect of the TIF Lite concept that has enabled that effort to go forward. He also plays a key role in implementing the City’s economic development incentives program.

Jay Sweet Skills Summary

- 30 years in land development
- American Institute of Certified Planners (AICP)
- Florida licensed Professional Surveyor and Mapper (PSM)
- Has managed code enforcement for local governments
- Is expert in ensuring Zoning Regulations are in compliance with state mandates
- Knowledgeable of Lee County regulations

Program Staff

Staffing for the remainder of Community Services will be determined as the scope of services is negotiated. The team selected will come our pool of experts and professionals, who are best suited to meet the community needs and expectations.



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The pool of CH2M specialist support that will become available to the Village of Estero in a limited service agreement numbers in the thousands and stretches across every aspect of program management and community development.

For example, we propose bringing in a start-up manager to help the team set up its organizational structure and performance management systems, engage the public in new policies, and properly equip staff to perform the work so that permanent staff can focus on providing services to the public. Later, Estero may wish to seek advice from a financial expert relative to ‘smart development’ strategies, recommending innovative funding sources for identified projects. As the Village Council is in negotiations for a new Village Hall, a construction manager may be necessary to oversee and coordinate the buildout of the space to accommodate public services. Environmental project management skills may be necessary to offer advice on establishing green strategies or a sustainability programs for a large construction project. This organizational structure allows Estero to have fully engaged local partners, while also having access to an extensive pool of on-call resources. It offers the best of both worlds: local focus, with global insights, through one affordable access point. Two specific resources designated to support the Village in its start-up efforts include:

Jonathan Mantay, Executive Sponsor

Jon Mantay is the Director of Municipal and Transportation Facilities for CH2M. He will work closely with the Village team to provide customer satisfaction and technical, safety and administrative aspects to the program. Working with Jay and the team, he will ensure the program meets the quality, safety and performance objectives. Jon oversees general project operations, customer service, and financial performance for all municipal services clients nationally. Mr. Mantay is an ICMA Credentialed Manager with nearly 30 years of local government administration experience, including 10 years in Florida. With his background in local government operations, he has provided general leadership and direction to all city and county functions, including public works, community development, downtown redevelopment, urban renewal districts, parks and recreation, economic development, library services, public safety, administrative services, business and community services, wild animal parks, and emergency management. He has incorporated sustainability into his management approach for many years, and managed the development and construction of two LEED-certified county buildings. Mr. Mantay has also developed strategic plans for fire services, wastewater, water, transportation, stormwater, and public safety to enhance service delivery through long-range planning techniques resulting in significant annual savings to operating budgets.

Jonathan Mantay Skills Summary

- 29 years of local governments experience
- ICMA Credentialed Manager
- Certified Governmental Finance Manager (1996)

Wayne Wright, Startup Manager

To support Mr. Sweet in the day-to-day start-up functions, we have identified Mr. Wright for this role. Wayne Wright is an experienced city manager and leader of outsourced local government services. Currently, he is Regional Business Manager for CH2M, responsible for government operations for the City of Johns Creek, Georgia, and the City of Peachtree Corners, Georgia. Mr. Wright led the successful startup of contract services when Peachtree Corners City Hall opened its doors on January 3, 2013, just 5 weeks after contract approval. As the city's needs have grown he managed the expansion of services from the original planning and zoning, administration, and code enforcement services to include municipal court, after-hours citizen response, and public works services. As CH2M's Project Manager for the City of Sandy Springs, Georgia, Mr. Wright managed the largest outsourcing of local government services in the nation, providing all city services except public safety and human resources.

Wayne Wright Skills Summary

- 32 years of service to cities, 22 years as city manager
- ICMA Credentialed Manager
- Managed startup of services for City of Peachtree Corners

Prior to his service at CH2M, Mr. Wright served as a city manager for 22 years in three cities in Georgia (Smyrna, Powder Springs, and Garden City), and began his career as a management analyst for Savannah, Georgia. He is an ICMA Credentialed Manager.

Section 3: Firm Experience

CH2M has been in the business of providing a full range of city services in the southeastern United States for almost 30 years, and is a national leader in the public-private partnership market. CH2M is prepared to put the full force of its global experience and local wisdom to work for the Village of Estero.

CH2M was founded in 1946 and is built on honesty, ethics, and integrity. We are an employee-owned company with approximately 25,000+ employees in regional offices worldwide and more than 1,000 in Florida. We have assisted new and existing communities in designing and operating all aspects of city services, and have received numerous awards for delivery excellence. Our public-private engagements have expanded over time to include a wide range of services, as shown in the following table.

City Services	Community Development	Administrative Services
Engineering	Project Development and implementation	Finance and procurement
Asset Management	Planning and zoning	Risk management
Parks and recreation	Code enforcement	Public information
Municipal courts	Building Inspections	Fleet management
Right-of-way maintenance	GIS	Facilities management
Utility management	Information Technology	Administrative services
Traffic engineering	Transportation planning	Information technology
Signs and signals		Citizen Response center
Capital improvements		Staff augmentation

For 30 years, CH2M has been providing a full range of city services, including community development, throughout the southeast United States.

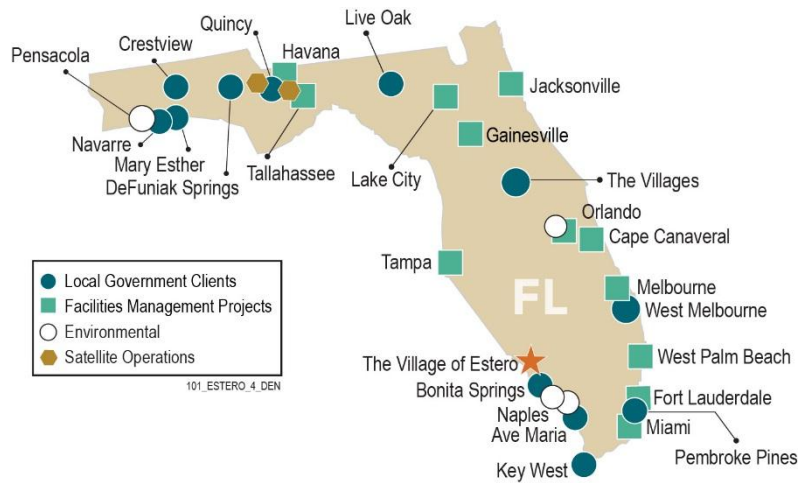
Particularly relevant to Estero is CH2M’s ability to establish public-private operations in a very time efficient and effective manner. From small communities to large urban centers, from taking on one existing city service to the start-up of municipalities for which we provide a full range of services, CH2M has met its mobilization goals every time, to the satisfaction of its client partner.

A Florida Partner

CH2M is a company that is renowned for its global insights, applied in partnership with its clients at the local level. Always, we take all that we know and continue to learn in our 250 public and private operations worldwide, and place it at the disposal of our partner-clients. Despite our insights, we readily admit that there is no one who knows better what will work within their own communities than those who live and work there. Under this philosophy of partnership and flexibility, we have assisted citizens in several states to successfully set up entire municipal governments from scratch as well as limited service agreements to accomplish their goals with economically sound planning and social and environmental viability.

CH2M started working in Key West in 1988 and this award-winning partnership continues today. This is testament to the long-term, mutually beneficial relationships we strive to create with our clients, like the one we look forward to creating for the Village of Estero. At present, CH2M provides direct service delivery for approximately 172 local government clients across the nation. CH2M client cities within the Southeast United States include the new cities of Sandy Springs, Milton, Johns Creek, and Peachtree Corners in Georgia and Central, Louisiana. When combined with our other long-running project experience within Florida, CH2M provides millions of accumulated project hours and unmatched experience in community development, public works, engineering, regulatory issues, capital planning, and construction.

CH2M agrees with Estero in its desire to keep general planning services close to the citizens, since this is an area of local government that residents value and access regularly, and is critical to achieving the larger community vision. CH2M has more than 30 years of community development experience in Florida, providing residents the local perspective they desire. Our closest client to Estero is Bonita Springs where we have a fully staffed office delivering community development services. This project provides Planning, Zoning, Building Permit Administrative, and Inspection Services. Through our Bonita Springs work and other efforts, we have a strong knowledge of, and many contacts within Lee County. This provides us with a firm foundation in local requirements and policies, and relationships which can facilitate the speedy resolution of issues in the start-up process. Our Florida operations have included many public private partnerships (PPPs), giving our team an understanding of the state’s “Sunshine Law” governing public records. The following table demonstrates the breadth and depth of CH2M’s current and former community development services, provided to municipalities across the Southeast.



For the last 30 years, CH2M has provided a variety of client city services within the state of Florida.

CH2M Community Development Services Provided for Current and Former Clients – in Southeastern United States											
City	Code Enforcement & Contractor Licensing	Development Review	Environmental Review & Enforcement	Zoning	Planning	Transportation Review & Planning	Housing & Historical Preservation	Administration including IT & GIS	Board of Adjustment and Appeal	Building Inspections	Assist with Village Boards
Bonita Springs, FL	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Central, LA	✓	✓	✓	✓	✓			✓	✓	✓	✓
Johns Creek, GA	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓
Milton, GA	✓	✓	✓	✓	✓			✓	✓		✓
Peachtree Corners, GA	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓
Sandy Springs, GA	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

CH2M has successfully provided relevant community development services for its clients throughout the Southeast.

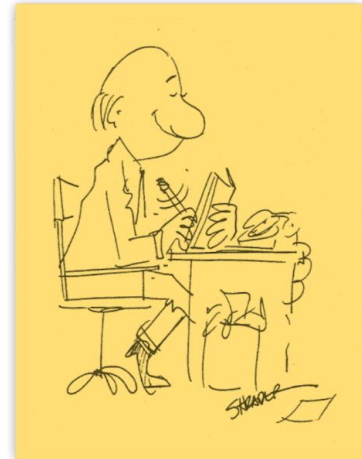
A Member of the Community

CH2M was founded on a culture of service – service to clients, colleagues, and the communities where we live and work. This service is not confined to the business day, office, or site. It takes place in classrooms, homeless shelters, and state parks; in large cities; and in small rural areas in developing communities. We believe in investing professional expertise, volunteer time and financial resources to address environmental and social issues that affect the communities where we live and work.

In Johns Creek, Georgia, for example, we provide STEM/Engineers Week programming at local middle schools and most recently assisted them in launching their public art program. In Peachtree Corners, Georgia, we are working with the local elementary school to renovate their outdoor classroom area. Locally we have supported our corporate water quality program by testing stormwater with students at the Bonita Springs Preparatory Academy.

As part of its commitment to Estero, CH2M will maintain close ties with the people and organizations of the Village. As we do in Johns Creek and Peachtree Corners, we would offer internships to Estero Community Development and Architectural students who are attending Florida Gulf Coast University. This serves to provide local talent with applied skills within their chosen career, strengthening community loyalty as well as tying development to progressive industry ideals and methods.

Our team is already embedded within your region, it is clear that our core values are already strongly aligned with Estero and the surrounding communities. We will continue to honor that ethic and work to positively contribute to the community.



*In 1978, founder and former CH2M President James Howland wrote a collection of management quotations to capture many of the values on which the firm was built. The values demonstrated in the **Little Yellow Book** are as valid today as they were back then, and perhaps even more so. CH2M was based on a strong foundation of doing the right thing, by our clients and our employees, and such values thankfully never go out of style.*

Section 4: Past Record

CH2M has notable successes from throughout the world; but what really matters is our ability to work side by side with the people of Estero to effectively and sustainably meet its community vision. Every operation is unique and requires a slightly different set of skills. CH2M provides the distinct advantage of having a large pool of resources from which to pull expertise, best practices, and benchmarks and apply them to opportunities as they arise.

The best indication of CH2M’s capabilities to effectively manage the general planning services for Estero is to describe our results with similar operations. The following is a summary of three similar Community Development Departments currently operated by CH2M, with demonstrated success in helping the associated communities meet performance goals and grow opportunities in line with their overall visions of prosperity and customer service.

Bonita Springs, Florida

CH2M delivers community development services for the city of Bonita Springs, directly adjacent to the Village of Estero. The partnership covers a range of community development responsibilities including planning, zoning, building permit administration, and inspection services. Project staff use a citizen responder approach through which citizens who need help can quickly reach a live person over the phone and typically receive assistance with just one call.

During the initial start-up period, CH2M reviewed all data and forms of records from Lee County and copied/transferred appropriate material to the City. This activity included records recovered in a digital format, records scanned and digitized, and unique records requiring special recovery (such as multiple years of Lee County meeting minutes addressing specific community development issues in Bonita Springs), as well as any other information deemed to be relevant and important to the new community development operation.

Specific services performed by CH2M associates include: zoning and development services; municipal codes, building permitting and inspection services; environmental sciences (vegetation, species, soil, water quality and quantity); flood and stormwater review services; implementing land development regulations; concurrency management; transportation development services; determination of transferable development rights (including conventional, planned development, special exceptions, and variances); expedited hearings, permitting, and inspections; Geographic Information Systems (GIS) mapping; and fee and rate studies.



Contact Information
Mr. Carl L. Schwing, City Manager
9101 Bonita Beach Road
Bonita Springs, FL 34135
239/949-6262

Scope of Services:

- Planning & Zoning Services
- Building Inspection
- Municipal Services
- Permit Processing

Award-Winning Services for Bonita Springs

- 1** Recognized in 2014 as one of the most efficient Community Development Departments in the state by Florida Department of Economic Opportunity
- 2** Achievement Award for Innovation and Outstanding Service by the Bonita Springs Estero Economic development Council
- 3** CH2M Annual Achievement Award for 100% injury free workplace (2008, 2009, 2010, 2011, 2012, 2013, 2014)
- 4** 10 of the original 13 employees still on the project (2 retirements)

Johns Creek, Georgia

CH2M played an integral role in the startup and operation of the new city of Johns Creek in the autumn of 2006. Fully operational on December 1, 2006, we continue to provide a full range of municipal services for this community of 82,000. The business processes, systems, and supporting subsystems developed as part of this startup and operation engagement included City Operations, Financial Management services, Community Development (including planning and zoning, code enforcement, and GIS), Public Works, Information Technology, Safety and Security, and Quality Programs.

Working with the city of Johns Creek, CH2M played an integral role in the creation and implementation of concepts for an effective and responsive government structure in less than 4 months. We advised City officials on

approaches for improving service, managing assets and finances, and responding to residents needs more effectively. Although the City's initial approach engaged CH2M in a single provider model, subsequent efforts have evolved to include a multi-vendor approach – CH2M has supported this approach, and continues to provide Community Development/Code Enforcement, Public Works, and Citizen Response Center Services at the request of the City. A major initiative today is the design, permitting, and development of a 700-acre Central Business District to create a civic center for this municipality. The CH2M project team is actively participating in this process.

Award Winning Service for Johns Creek, Georgia

September 2011	Outstanding Public Member Award by the Intelligent Transportation Society of Georgia
December 2011	Johns Creek ranked at top in Georgia for quality of life by The Business Journals
January 2008	City's public-private partnership earns national recognition from the U.S. Conference of Mayors

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Contact Information

Mr. Warren Hutmacher
City Manager
12000 Findley Road, Suite 400
Johns Creek, GA 30097
678/512-3200

Scope of Services:

- Citizen Response Center
- Code Enforcement
- Planning
- Zoning
- Public Works
- Permit Processing

Peachtree Corners, Georgia

CH2M was selected in 2012 to assist the city leadership in standing-up this new metro Atlanta city of 37,000. As a limited service city, Peachtree Corners' charter restricts direct service provision to planning and zoning, code enforcement, and solid waste management. Under this umbrella, the city contracted with CH2M for planning and zoning, code enforcement, and administration services. Other contractors are responsible for building inspection and plan review, GIS, and IT services.

City Hall opened its doors on January 2, 2013, and the CH2M team was ready, with all processes, procedures, and forms in place to facilitate development within the city. Our team quickly moved to collect all revenues due the city, including occupation taxes and sanitation fees, and worked with the city's appointed judge to create a municipal court to handle city code violations. By May of 2013, collections of occupation taxes exceeded the budget target for by \$1 million. The CH2M team also worked closely with City staff to create all needed processes and forms for the various zoning and development actions provided for in the City code. We created citizen-friendly code enforcement procedures, responding to the City's desire to improve the community's appearance. Recognizing the impact on residents and businesses of a higher level of code enforcement, we tailored our approach to complement the City's desire for an educational and informative process.

Responding to the City Council's desire to ensure safe and wholesome living conditions for its residents, the CH2M team began a coordinated apartment sweep program, beginning with the oldest complexes, using an inter-disciplinary team to thoroughly document code violations and clean them up one development at a time.

When the settlement of an ongoing lawsuit between Gwinnett County and its cities mandated that each city provide public works services, CH2M responded to Peachtree Corners' need by providing a Public Works management team to oversee field services including city street and right-of-way maintenance, street sign maintenance, and capital improvement planning and management.



Contact Information

Mr. Julian Jackson
City Manager
Peachtree Corners City Hall
147 Technology Parkway Suite 200
Peachtree Corners, GA 30092
678/691-1200

Scope of Services:

- Citizen Response Center
- Code enforcement services
- Planning and zoning services
- Land development services
- Administrative services - Revenue collection, financial support, municipal court, general staff support

Appendix A – Resumes

Jay Sweet

Program Manager

Certifications

State of Florida Professional Surveyor and Mapper #5747
American Institute of Certified Planners #019411

Professional Organizations/Affiliations

Florida Land Surveyors Council
Treasure Coast Land Surveyors Council
American Planning Association

Relevant Experience

Mr. Sweet has more than 30 years in land development covering the areas of project management, site plan design, land surveying, engineering coordination, comprehensive planning, zoning, permitting, and inspections.

Representative Projects

Community Development Professional, CH2M, Bonita Springs Community Development Project. The Bonita Springs project provides community development and building services to the citizens of Bonita Springs. Mr. Sweet serves as both the City Surveyor and a land planner. As the City Surveyor, duties include reviewing development orders, plats, zoning amendments and special exceptions. As a Land Planner, Mr. Sweet has prepared, and suggested amendments to the City Code of Ordinances, often making presentations to the City Council and other governing boards. He was integral in creating the framework for the Downtown redevelopment effort, and was the architect of the “Tiff Lite” funding mechanism. Additionally, he is part of the review team for the City’s economic development incentives program.

Professional Surveyor and Mapper, Jay L. Sweet. Land surveying firm whose general areas of practice are A.L.T.A. surveys, construction layout, predevelopment surveys, as built or record drawings, topographic surveys, subdivision plats.

Vice President of Surveying and Mapping, Mora Engineering Contractors, Inc. (MEC). MEC is an underground construction firm, whose general areas of practice are installation of water lines, installation of sanitary sewer lines, installation of storm drainage structures, excavation including the creation of lakes.

Survey Manager - Geometric Controls, Modern Continental South Inc., Palm Beach International Airport Interchange Project. The P.B.I.A. – I-95 connector project consisted of 14 segmental bridges, five cast-in-place bridges and 15 lane kilometers of paving. Mr. Sweet participated in the following:

- Construction layout
- As-built surveys
- Prepare repair procedures to compensate for plan deficiencies
- Review as built data and present Geometric solutions for mis-cast construction
- Provide project representation at weekly F.D.O.T. meetings

Developmental Consultant, Sweet & Associates, Inc. For this land development consulting firm, Mr. Sweet participated in general areas of practice, including regulatory permitting, comprehensive plan amendments, rezoning, special exceptions, variances, land development design, authoring land development regulations, and representing clients to regulatory agencies.

Program Director, Executive Management and Engineering Consultants, Inc. Mr. Sweet's general duties included the establishment of work schedules, work assignments and deadline planning, client relations, representation for clients to appropriate regulatory agencies. His specific duties included:

- Establish company goals, implement appropriate policies that would direct the company to their goal
- Land development design
- Co-author of the development plans of five separate municipalities
- Public presentations

Department of Public Services, Administrative Assistant to the Director of Public Services, Town of Jupiter.

The Department of Public Services consists of nine separate divisions functioning as an integrated unit to provide the necessary government services to the community while monitoring new developments taking place within the town. The nine divisions of the Public Services were:

- Administration
- Parks and recreation
- Animal regulation
- Planning
- Building
- Public works
- Code compliance
- Zoning
- Engineering

Specific duties included review and/or prepare the annual budget for the various divisions. He prepared ordinances to revise or update the Town's zoning code (i.e., A.C.L.F. HI-TECH INDUSTRIAL; Tree Preservation; etc.). He reviewed all petitions submitted to the Planning & Zoning Commission and Town Council, prepared staff recommendations including comments from all concerned departments. Mr. Sweet handled public inquiries concerning either planning, zoning, or land-use. He prepared position papers covering such items as changes in state statutes and proposed countywide planning council.

Surveyor, Lake Worth Drainage District. Mr. Sweet reviewed proposed development plans for the need of additional right of ways for canal and drainage purposes, review legal descriptions and right of way dedications for completeness. Survey and layout canals as necessary, and maintain the District's development records.

Wayne Wright

Startup Manager

Education

M.A., Public Administration, University of North Carolina at Chapel Hill

B.S. (Magna Cum Laude), Urban Government and Administration, Georgia State University

Professional Organizations/Affiliations

Credentialed Manager, International City/County Managers Association (ICMA)

Georgia City-County Management Association; Board of Directors 1990, 1997

Relevant Experience

Wayne Wright is an experienced city manager and leader of outsourced local government services. Currently, he is Regional Business Manager for CH2M, responsible for government operations for the City of Johns Creek, Georgia, and the City of Peachtree Corners, Georgia. Mr. Wright managed the startup of contract services when Peachtree Corners City Hall opened its doors on January 3, 2013. As CH2M's Project Manager for the City of Sandy Springs, Georgia, Mr. Wright managed the largest outsourcing of local government services in the nation, providing all city services except public safety and human resources. Prior to his service at CH2M, Mr. Wright served as a city manager for 22 years in three cities in Georgia (Smyrna, Powder Springs, and Garden City) and began his career as a management analyst for Savannah, Georgia.

Representative Projects and Dates of Involvement

Regional Business Manager, CH2M, Atlanta, GA. Johns Creek was incorporated in 2006 using a public/private partnership with CH2M to provide all of its services except for public safety. In 2009, the partnership transitioned a number of staff to the city's employment, with CH2M retaining responsibility for all public works operations; for all community development functions including building and development services, planning and zoning, and code enforcement; for parks operations and recreation programming; and for call center services. Mr. Wright has served as the senior contract employee for the City of Johns Creek with responsibility for these services since 2010.

Peachtree Corners was incorporated in 2012 and competitively selected CH2M to create its inaugural services in January of 2013. Beginning with planning and zoning, code enforcement, and revenue administration, the City soon added expanded financial administration services, municipal court, public works, and after hours citizen response to the CH2M contract. Mr. Wright managed the startup of these services and is responsible for ongoing operations as the senior contract employee.

Director of Operations, CH2M, Sandy Springs, GA. Sandy Springs is a new city, incorporated in 2005, that utilizes contracts to provide all of its services, except for public safety. Its founders selected CH2M through a competitive process to manage the City's startup and operate City Hall and all of the City's services, resulting in the largest outsourcing of city services in the nation. Sandy Springs is Georgia's seventh-largest city and shares a boundary with Atlanta on the capital city's north side. It is home to five Fortune 1000 headquarters and has among the highest per-capita income in the nation. As the senior contract employee in this unique public/private partnership, Mr. Wright was responsible for all City services except public safety and human resources. These services include street and parks maintenance, right-of-way mowing, storm water infrastructure maintenance, traffic management, capital project management, subdivision plan review, building inspection, code enforcement, rezoning request processing, parks operations and programming, municipal court, revenue collection, purchasing, accounts payable, financial reporting, and building operations.

Jonathan Mantay

Executive Sponsor

Education

M.A., Public Administration, New Mexico State University
B.A., International Relations, New Mexico State University

Continuing Education

University of Denver – Rocky Mountain Program (1996)
University of Virginia – Senior Executive Institute (2009)
Gettysburg Institute – ICMA Sponsored (2015)

Professional Organizations/Affiliations

Credentialed Manager, International City/County Managers Association (ICMA)
Certified Government Finance Manager, Association of Government Accountants

Relevant Experience

Mr. Mantay has 25 years of local government administration experience including 10 years in Florida. With his background in city and county operations, he has provided general leadership and direction to all city and county functions, including public works, community development, downtown redevelopment, urban renewal districts, parks and recreation, economic development, library services, public safety, administrative services, business and community services, wild animal parks, and emergency management. He has incorporated sustainability into his management approach for many years, and managed the development and construction of two LEED-certified building for county use. Mr. Mantay has also developed strategic plans for fire services, wastewater, water, transportation, stormwater, and public safety to enhance service delivery through long-range planning techniques resulting in significant annual savings to operating budgets and updating.

Representative Projects and Dates of Involvement

Director of Municipal and Transportation Facilities, CH2M, Atlanta, GA. CH2M has provided general government services to the Cities of Sandy Springs, Johns Creek, and Peachtree Corners, Georgia, Centennial, Colorado, and Bonita Springs, Florida, through a contractual arrangement. Leads the delivery of service to these cities through a public-private partnership model, including Public Works (i.e., Transportation, Traffic Center Operation, Stormwater, Capital Improvement Management, Field Services, Recreation and Parks), Community Development (i.e., Planning, Zoning, Building Services, Code Enforcement), Administrative Services (i.e., Finance, Accounting, Purchasing, Fleet, Facilities, Risk Management, Grant Administration, Business Licenses, etc.), Municipal Court, and Communications. In addition, serves as the Transportation Markets' Delivery lead to the OM Services Business Group.