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**VILLAGE OF ESTERO, FLORIDA**

**RESOLUTION NO. 2015 - 49**

**A RESOLUTION OF THE VILLAGE COUNCIL OF THE  
VILLAGE OF ESTERO, FLORIDA, APPROVING THE  
QUALIFICATIONS AND RANKING OF FIRMS FOR  
RFQ 2015-01 FOR GENERAL PLANNING SERVICES;  
AUTHORIZING THE VILLAGE MANAGER TO  
NEGOTIATE TERMS; AND PROVIDING AN  
EFFECTIVE DATE.**

**WHEREAS**, the Village of Estero issued a Request for Qualifications (RFQ 2015-01) seeking interested firms to submit responses to provide general planning services to the to-be-formed Community Development Department of the Village of Estero; and

**WHEREAS**, the competitive selection of services is in the public interest of the residents of the Village of Estero; and

**WHEREAS**, some of the professional services requested may be provided by consultants and firms which qualify under the Consultants' Competitive Negotiations Act ("CCNA"), Section 287.055, Florida Statutes ; and

**WHEREAS**, consistent with CCNA, the Village Council has reviewed the responding proposals, qualified and ranked the firms.

**NOW, THEREFORE**, be it resolved by the Village Council of the Village of Estero, Florida:

**Section 1. Findings.**

The Village Council has reviewed the responses to RFQ 2015-01 and evaluated, in good faith, the responding firms, their qualifications, their approaches, and ability to providing the general planning services for the Village listed in RFQ 2015-01 and determined through their written submittals and oral presentations that the following three (3) firms, ranked highest to lowest, are the most responsive to the Village's request for qualifications:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

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**Section 2. Negotiations and Award.**

The Village Manager is hereby authorized, pursuant to the requirements of CCNA, to negotiate with the top-ranked firm above and bring a fair, competitive, and reasonable contract for services to the Village Council for award and approval.

**Section 3. Subsequent Negotiations and Right to Reject.**

Should the Village Manager be unable to negotiate a satisfactory contract with the top-ranked firm he may begin negotiations with the remaining firms in successive order. If the Village Manager is unable to reach an accord with any of the above-mentioned firms, the Village reserves the right to reject all remaining responses and proceed with a second request for qualifications.

**Section 4. Effective Date.**

This resolution shall take effect immediately upon adoption.

**ADOPTED BY THE VILLAGE COUNCIL** of the Village of Estero, Florida this \_\_\_\_\_ day of \_\_\_\_\_, 2015.

Attest:

**VILLAGE OF ESTERO, FLORIDA**

By: \_\_\_\_\_  
Kathy Hall, MMC, Village Clerk

By: \_\_\_\_\_  
Nicholas Batos, Mayor

Reviewed for legal sufficiency:

By: \_\_\_\_\_  
Burt Saunders, Village Attorney



July 13, 2015

**VILLAGE OF ESTERO, FLORIDA**  
**REQUEST FOR QUALIFICATIONS**  
**FOR GENERAL PLANNING SERVICES**  
**FOR THE VILLAGE'S**  
**COMMUNITY DEVELOPMENT DEPARTMENT**  
**RFQ #2015-01**  
**INVITATION**

IN ACCORDANCE WITH SECTION §287.055 OF FLORIDA STATUTES "CONSULTANTS' COMPETITIVE NEGOTIATIONS ACT" (CCNA), THE VILLAGE OF ESTERO HEREBY INVITES INTERESTED AND QUALIFIED FIRMS WITH FLORIDA LICENSED PROFESSIONAL ARCHITECTS, ENGINEERS, PLANNERS, LANDSCAPE ARCHITECTS AND / OR SURVEYORS TO PRESENT THEIR QUALIFICATIONS FOR PROVIDING GENERAL PLANNING SERVICES TO THE TO-BE-FORMED COMMUNITY DEVELOPMENT DEPARTMENT OF THE VILLAGE OF ESTERO IN ACCORDANCE WITH THE FOLLOWING TERMS AND CONDITIONS:

1. Services. The services shall include the following on a continuing contract basis:

- Code enforcement and contractor licensing;
- Development review, including site plans;
- Environmental review and enforcement;
- Zoning;
- Planning;
- Transportation review and planning as it relates to land approvals;
- Housing and Historical Preservation;
- Administration, including support functions such as IT and GIS;
- Board of Adjustment and appeal;
- Building Permitting and plan review (including floodplain review);
- Building Inspections;
- Assistance with Village Land Use Boards, as needed.

2. Information Package. Qualified parties interested in responding to this Request for qualifications request a general information package containing details relevant to this RFQ from Peter G. Lombardi, Village Manager, by emailing [lombardi@estero-fl.gov](mailto:lombardi@estero-fl.gov) or calling 239-390-8000.
3. Responses. Written responses shall be due on or before Wednesday, August 5, 2015 at 2:00 p.m. at the Village's address set forth above. Responses by email in PDF format will be accepted. If the responder is unable or unwilling to provide any of the listed services, this must be stated in the response.
4. Questions. Questions concerning this RFQ should be directed by email to Peter G. Lombardi, Village Manager, at [Lombardi@estero-fl.gov](mailto:Lombardi@estero-fl.gov), with a copy to Vice-Mayor Howard Levitan, [Levitan@estero-fl.gov](mailto:Levitan@estero-fl.gov).
5. Ranking of Qualifications; Negotiation. Firms will be qualified and ranked by the Village Council pursuant to the terms and requirements of the CCNA. Among the factors to be considered will be the capabilities, adequacy of personnel, past record, and experience of the firms, and the individuals within such firms to be performing professional services for the Village. Rankings of respondents shall be done as soon as possible after the date for responses, and all responders notified. Negotiations will commence with the most qualified firm upon such notification.
6. Right to Reject. The Village of Estero reserves the right to reject any or all responses, waive any informality or irregularity on any response if considered non-substantial to the Village, or to cancel this invitation at will. Responses received after the date and time stipulates herein will be considered late therefore disqualified.

By: Peter G. Lombardi, Village Manager

July 13, 2015

**VILLAGE OF ESTERO, FLORIDA  
REQUEST FOR QUALIFICATIONS  
FOR GENERAL PLANNING SERVICES  
FOR THE VILLAGE'S  
COMMUNITY DEVELOPMENT DEPARTMENT**

**GENERAL INFORMATION**

1. Commencement of Service: The services to be provided as listed in the RFQ are to be phased in over the following schedule:

Code Enforcement and contractor licensing, development review, environmental review and enforcement, zoning, planning, transportation review, housing and historic preservation, and administration (including IT, GIS, and assistance to Land Use Boards) shall commence on October 1, 2015;

Board of adjustment and appeal, building permitting and plan review (including floodplain review), and building inspections shall commence on January 1, 2016.

2. Levels of Service. For the purposes of information and comparison only, the Levels of Service relating to Community Development proposed to the Village by Lee County are shown in the attached "Exhibit A." These are the levels of service that Lee County has stated are currently being performed for the unincorporated areas of the County, which previously included the Village of Estero. The proposed cost of the overall Community Development services proposed for FY 2015-2016 by Lee County are shown in the attached "Exhibit B," which is also provided for information and comparison purposes only. The figures shown in Exhibit A are shown net of revenue. The most recent revenue figures from Lee County are shown in Exhibit C attached hereto from Lee County for the calendar period 1/1/2014 to 12/31/2014 and relate to the Estero Fire District, which has similar (but not the same) borders as the Village of Estero, and is again provided for information and comparison purposes only.

3. Reports: More information regarding current activities by Lee County Community Development with respect to properties in the Village of Estero may be found on the Lee County Community Development Website through the “econnect” system. Attached as Exhibit D are a variety of reports for the month of June, which are provided for information purposes only.

EXHIBIT "A"

Service Levels

Community Development

Development review:

The Development Order (DO), Limited Review Development Order (LDO), and Plat processes are strictly administrative and not subject to public input. Staff reviews and approves/rejects applications based upon compliance with the Lee Plan, the Land Development Code, Administrative Codes and applicable Florida State Statutes. Target review/inspection timeframes are as follows:

Large DO Applications:

Initial review.....	15 business days
Resubmittal review .....	7 business days/review
Minor change.....	5 business days/review
Amendment.....	8 business days/review
CC Inspection.....	1 business day

Small DO Applications:

Initial Review .....	10 business days
Resubmittal review .....	7 business days/review
Minor change.....	5 business days/review
Amendment.....	8 business days/review
CC Inspection.....	1 business day

LDO Applications:

Type A.....	5 business days/review
Type B.....	10 business days/review
Type C.....	10 business days/review
Type D.....	10 business days/review
Type E.....	10 business days/review
CC Inspection.....	1 business day

Plat Applications:

Preliminary review .....	21 business days/review
Final review .....	21 business days/review
(Legal Sufficiency reviews by the Village Attorney)	

Petitions to Vacate Easements, Rights-of-Way and Plats (VAC) is a process that includes a public hearing with approval/denial action by the Village Council. Staff conducts an application review for compliance with the applicable Administrative Code(s) and Florida State statutes, and prepares a summary staff report with a recommendation for action (Blue Sheet for BoCC) presented by the Village Attorney.

VAC Applications

Preliminary review .....	21 business days/review
Final review .....	21 business days/review

Planning and Historic Preservation:

The following are administrative processes not subject to public input:

Application:	Typical Review time:
Land Use Boundary Determinations	7 business days/review
Wetland Determinations	7 business days/review
Regular Certificates of Appropriateness (Historic)	7 business days/review
Certificates to Dig	20 business days/review

The following applications are required to go to the Historic Preservation Board (HPB):

Application:	Review/Notice Type:	Typical Review Time:
Special Certificate of Appropriateness	Initial review	30 calendar days
	Resubmittal review	15 calendar days/review
	Public hearing notice (newspaper)	5 calendar days
	Historic preservation board meeting and final action	70 calendar days from application being found complete
	Suspend action for technical advice	35 calendar days
	Historic preservation board meeting and final action	105 calendar days from application being found complete (if technical advice is required)
Historic Designation	Initial review	30 calendar days
	Resubmittal review	15 calendar days/review
	Preparation of designation report	20 calendar days
	Notice to owner	20 calendar days prior to public hearing
	Public hearing notice (newspaper)	5 calendar days
	Historic preservation board public hearing	70 calendar days from designation report being filed with HPB
	Historic preservation board decision	14 calendar days after date of public hearing
	Recording of designation	25 calendar days after date of decision rendered

The following is the process for comprehensive plan amendments which requires three public hearings:

Review/Notice Type:	Typical Review Time:
Initial review	30 calendar days
Resubmittal review	30 calendar days/review
Public hearing notice (ad due to News Press)	21 calendar days prior to LPA public hearing
Staff report distributed	14 calendar days prior to LPA public hearing
LPA meeting	30± calendar days from date application is complete
Transmittal staff report prepared	14 calendar days from LPA meeting
Public hearing notice (ad due to News Press)	14 calendar days prior to BOCC transmittal hearing (notice prepared and paid for by CAO)

### Environmental Review and Enforcement:

- Environmental review of comprehensive plan amendments, rezoning applications, special exceptions, and development orders, including reviewing protected species surveys and management plans associated with large projects. Also includes Certificate of Compliance reviews for landscaping, preserved vegetation, stormwater pond plantings, invasive exotic plant removal, management plans, and open space requirements related to development orders.
- Review and approval of Vegetation Permits.
  - Vegetation Removal Permits for existing trees in common areas of developments that are deemed to pose a safety hazard to pedestrian or vehicular traffic or existing buildings or structures; diseased trees which are a hazard; or trees weakened by natural causes as specified in the LDC. To be completed in 7-10 business days.
  - Notices of Clearing – staff conducts a survey for protected species, prepares a document to send to the Clerk of Courts for recording, as required by the LDC and Administrative Code. To be completed within 30-45 days.
  - Exotic Removal – inspection and provision of courtesy letter confirming the presence of exotic species on property and recommending methods of removal to avoid damaging existing native vegetation.
- Compliance and Enforcement – inspections of development sites to ensure ongoing compliance with environmental regulations and development approvals and identify environmentally-related code violations. Initial inspection 1-2 days from receipt of complaint, Notice of Violation sent within 8 business days of inspection, participation in Enforcement Hearing.
- Dock and Shoreline Structures Permitting and Inspection. Initial review/revision review within 1 business day of submittal, final inspection within 1 business day of notification.
- Staffing of Eagle Technical Advisory Committee, maintenance of Bald Eagle data.

### Zoning:

- Conventional Rezoning, Variances, Special Exceptions and Administrative Actions
  - Sufficiency review and comment within 15 working days of receipt of application and sufficiency responses.
  - Once sufficient, hearing date to be scheduled within 60 days (by Village), during which time staff prepares agendas, notices, and staff reports. Staff reports issued 2 weeks prior to hearing date.
- Planned Development Rezoning and Amendments
  - Sufficiency review and comment within 15 working days of receipt of application and sufficiency responses.
  - Once sufficient, hearing date to be scheduled within 60 days (by Village), during which time staff prepares agendas, notices, and staff reports. Staff reports issued 2 weeks prior to hearing date.
- Zoning Verification Letters
  - Reviewed/issued by staff within 10 working days

## **Building Department Turn Around Times**

**Permitting:** The permitting process operates on target times as outlined below. The actual review times (inclusive of floodplain review, zoning review, and structural plan review) vary based on the department workload. The current review times are published daily on the department website, with both the target times and actual turnaround based on current department workload.

- Residential new-target time is 7 days
- Residential resubmittal and revision-target time is 3 days
- Commercial (new)-target time is 21 days
- Commercial resubmittal and revision-target time is 7 days
- Commercial Interior Remodel-target time is 16 days

**Building Inspections:** inspections are conducted with a 1 day turnaround, with contractors/owners having until 5:30 am to make an inspection request for the business day.

**Board of Adjustments and Appeals:** applicants have thirty days from the date a decision is rendered to file an appeal to the Board. Hearings will be conducted within 15 days of the appeal request being filed.

### **Code Enforcement Activities**

- Code complaints-initial inspection due within three days of complaint
- Fence permit inspections-one day turnaround
- Sign permit inspections-one day turnaround

**EXHIBIT "B"**

Lee County Proposal to Provide Services to Village of Estero FY15-16	FY14-15 Adopted Budget	FY15-16 Proposed Budget	8.2% of Unincorp. Population	Total
<b>Natural Resources</b>				
<b>Surface Water Mgmt</b> Provide project management services for surface water projects Respond to requests for action regarding flooding and water quality complaints Review plans for development that effect surface water management Participate in and review regional water management studies Monitor and report hydrologic data (rainfall, river stage and groundwater levels) Manage mandated NPDES MS4 permit Track TMDL compliance for impaired waters	\$ 1,456,519	\$ 1,487,664	\$ 121,988	
<b>Major Maintenance</b> (Estero River, 10 Mile Canal, Surface Water Mgt Plan, Neighborhood Imp Plan, Filter Marsh & BMP Maintenance, Clean & Snag Program)	\$ 1,180,000	\$ 1,180,000	\$ 96,760	
Appeal 2015 Preliminary Flood Insurance Rate Maps FIRM (2 year task estimated cost)			\$ 100,000	
<b>Total Natural Resources</b>				\$ 318,748
<b>Community Development</b>				
Code enforcement and contractor licensing	2,403,073	2,356,100		
Development review	1,390,917	1,373,200		
Environmental review and enforcement	757,470	728,303		
Zoning	1,073,302	1,128,615		
Planning	1,404,043	1,607,060		
Administration	1,455,733	1,505,312		
Board of adjustments and appeal				
Permitting and plan review (and floodplain review)				
Building Inspections				
<b>Total Community Development</b>	\$ 8,484,538	\$ 8,698,590	\$ 713,284	\$ 713,284
<b>Transportation</b>				
<b>Canal Maintenance</b> Ditch/Canal cleaning to maintain hydraulic flow, including cleaning/repairing drainage pipes, catch basins and weirs	\$ 2,014,231	\$ 1,960,292	\$ 160,744	
<b>Transportation Trust</b> Roadway maintenance: Maintain pavement condition, patching potholes, sweep curbed roads, bike paths, sidewalks Landscape maintenance, including irrigation systems, roadside median mowing Maintain bridges, handrails and guardrails Maintain roadway signage and striping Maintain traffic signals, flashers, ITS devices and streetlights; Traffic Operations Center Administration Long range transportation planning, zoning & development review & road maintenance acceptance/vacation activities, right-of-way inventory Engineering and general traffic analysis & Right-of-way permitting (mostly driveways)	10,236,232 3,843,093 1,357,067 2,807,463 4,590,809 1,006,371 503,396 1,761,591	10,147,193 3,928,598 1,343,532 2,713,744 4,781,481 1,060,253 581,914 1,803,166		
	\$ 26,106,022	\$ 26,359,881	\$ 2,161,510	
<b>Total Transportation</b>	\$ 28,120,253	\$ 28,320,173		\$ 2,322,254
<b>Animal Services</b>				
Animal Control and Shelter	\$ 2,367,486	\$ 2,362,382	\$ 193,715	
<b>Total Animal Services</b>				\$ 193,715
<b>Other</b>				
Estero Election 03/03/2015				\$ 78,824
Vehicle Replacement Fund	\$ 1,699,887	\$ 1,699,887	\$ 139,391	\$ 139,391
Employee Pay Increase for FY15-16 (not yet included in budget)		\$ 513,831	\$ 42,134	\$ 42,134
<b>Total Estero Proposal</b>	\$ 43,308,683	\$ 44,282,527		\$ 3,808,350

EXHIBIT "C"

Revenues For: Estero Fire District From: 1/1/2014 To: 12/31/2014

ACCOUNT STRING	ACTIVITY	COUNT	REVENUE
<b>Permits</b>			
LC5240015501.322000.9006	Air Conditioning	1,734	\$157,501.11
LC5240015501.322000.9011	Building Move Permit Fees	1	\$500.00
LC5240015501.322000.9001	Building Permits	1,707	\$729,749.34
LC5240015501.322000.9015	Demolition	16	\$2,550.00
LC5240015501.322000.9005	Electric	5	\$375.00
LC5240015501.322000.9005	Electric / Low Voltage Trade	1,099	\$87,180.00
LC5240015501.322000.9019	Fire Alarms	44	\$3,712.00
LC5240015501.322000.9023	Fire Suppression	69	\$8,186.25
LC5240015501.322000.9023	Fire Tank and Lines	17	\$2,125.00
LC5240015501.322000.9014	Gas	114	\$11,400.00
LC5240015501.322000.9005	Low Voltage Sub Permits	30	\$3,150.00
LC5240015501.322000.9009	Occupancy	55	\$3,810.00
LC5240015501.322000.9004	Plumbing	438	\$65,668.39
LC5240015501.322000.9003	Roofing	535	\$50,660.00
LC5240015501.322000.9010	Sewer	305	\$22,875.00
LC5240015501.322000.9008	Sign	148	\$11,350.05
LC5240015501.322000.9004	Solar	102	\$7,725.00
	<b>SUBTOTAL</b>	<b>6,419</b>	<b>\$1,168,517.14</b>
<b>Permitting-Other</b>			
LC5240015501.322000.9021	Building Reinspection Fees	397	\$29,500.00
LC5240015501.322000.9001	Change of Contractor	20	\$1,050.00
LD5120315500.369900.9001	Copies	30	\$870.66
LC5240015501.322000.9002	Permit Extensions	5	\$500.00
LC5240015501.322000.9020	Plan Review	1,958	\$280,296.60
LC5240015501.322000.9001	Reprint Permit Board	6	\$35.00
LC5240015501.322000.9020	Res Zoning Fee	1,088	\$33,235.00
LC5240015501.322000.9001	Revision Fees	174	\$7,066.23
LC5240015501.322000.9001	Temporary Co	7	\$950.00
	<b>SUBTOTAL</b>	<b>3,685</b>	<b>\$353,503.49</b>
<b>Code Enforcement/Cont. Licensing</b>			
.C5241115500.343900.9024	Abandoned Property Registration	1	\$3,600.00
.C5241115500.343900.9016	Hearing Exam Cost	8	\$985.00
.C5241115500.343900.9015	Hearing Examiner Fine	2	\$3,711.71
.C5241115500.343900.9005	Lot Mowing *	8	\$2,579.95
.C5241115500.343900.9021	Nuisance Abatement *	3	\$724.75
.C5241115500.343900.9016	Release of Lien	3	\$855.00
	<b>SUBTOTAL</b>	<b>25</b>	<b>\$12,456.41</b>

### Planning

LB5150715500.322000.9018	Comp. Plan Fees	3	\$8,660.00
LE5151815500.322000.9001	Dock Permits	13	\$3,845.00
LE5151815500.322000.9001	Plan Review	12	\$1,494.00
LE5151815500.322000.9028	Reinspection Fees	9	\$750.00
LE5151815500.329000.9002	Vegetation Permit	24	\$848.00
	<b>SUBTOTAL</b>	<b>61</b>	<b>\$15,597.00</b>

### Development Review

LC5151315500.341900.9012	DO Applications	16	\$63,680.40
LC5151315500.341900.9019	DO Minor Changes	13	\$2,300.00
LC5151315500.341900.9013	DO Resubmittals & Amends	11	\$10,920.00
LC5151315500.341900.9014	DO Variances & ADDs	1	\$400.00
LC5151315500.341900.9016	LDO Applications & Amends	63	\$20,850.00
LC5151315500.341900.9020	Plats	13	\$17,803.00
LC5151315500.341900.9019	Reinspection Fee	1	\$50.00
LC5151315500.341900.9011	Vacations & RDM	1	\$900.00
	<b>SUBTOTAL</b>	<b>119</b>	<b>\$116,903.40</b>

### Zoning

LF5151615500.341900.9010	Administrative Applications	26	\$35,450.00
LF5151615500.341900.9008	DCI & PD Rezoning	4	\$43,564.00
LF5151615500.341900.9021	Home Occ Lic & MUD,ZVL	18	\$3,600.00
LF5151615500.341900.9007	Special Exceptions & COPs	2	\$2,000.00
	<b>SUBTOTAL</b>	<b>50</b>	<b>\$84,614.00</b>

**Total Community Development Revenues** \$1,751,590



Department of Community Development  
Development Services Division

Development Review Applications Received

Village of Estero Planning Community

From: 6/1/2015 To: 6/30/2015

EXHIBIT "D"

Case Number	Project Name	Application Type	Received Date	Target Date	Completed Date	Calendar Days	Disp.
<b>Staff Name:</b> AHB <a href="#">ADD2015-00098</a>	Alvin Block, AICP LEGACY CHURCH	PDZ Application (PD Admin)	06/12/2015	07/13/2015			
Total Cases for: Alvin Block, AICP 1							
<b>Staff Name:</b> GWR <a href="#">PLT2015-00017</a> <a href="#">LDO2015-00258</a>	Gary W Rashford UNIVERSITY HIGHLAND TRACT 3 R DISCOVERY DAY ACADEMY	CAO Preliminary Review LR1 Application (LDO Resub) A	06/05/2015 06/17/2015	07/07/2015 06/24/2015	06/29/2015 06/30/2015	24 13	DEN APPR
Total Cases for: Gary W Rashford 2							
<b>Staff Name:</b> OXH <a href="#">DOS2015-00048</a>	Ohdet Hanna ESTERO 4.2	RO1 Application (Resubmittal)A	06/16/2015	06/25/2015			
Total Cases for: Ohdet Hanna 1							
<b>Staff Name:</b> RLW <a href="#">LDO2015-00356</a> <a href="#">LDO2015-00368</a>	Rebecca Whitney MCDONALD'S CORKSCREW SBS CYPRESS HAMMOCK	APPL A (trmsmtl, pond-RES/AG) APPL A (trmsmtl, pond-RES/AG)	06/25/2015 06/29/2015	07/02/2015 07/07/2015			
Total Cases for: Rebecca Whitney 2							
<b>Staff Name:</b> RDH <a href="#">DOS2015-00056</a> <a href="#">DOS2015-00047</a> <a href="#">LDO2015-00248</a> <a href="#">LDO2015-00373</a> <a href="#">LDO2015-00369</a>	Robert D. Hutcherson SHOPPES OF COCONUT TRACE HIGHLAND OAKS DRIVE CVS 3281 RETAIL HEALTH CENTER THE VILLAS AT TIMBERLAKE TURNBERRY II @ PELICAN SOUND	DO2 Application (Small DO) A RO1 Application (Resubmittal)A LR1 Application (LDO Resub) A APPL A (trmsmtl, pond-RES/AG) APPL A (trmsmtl, pond-RES/AG)	06/03/2015 06/10/2015 06/18/2015 06/29/2015 06/29/2015	06/17/2015 06/19/2015 06/25/2015 07/07/2015 07/07/2015	06/22/2015 06/23/2015 06/22/2015	19 13 4	DEN DEN DEN
Total Cases for: Robert D. Hutcherson 5							



Department of Community Development  
Development Services Division

Development Review Applications Received

Village of Estero Planning Community

From: 6/1/2015 To: 6/30/2015

Case Number	Project Name	Application Type	Received Date	Target Date	Completed Date	Calendar Days	Disp.
Staff Name: SLH <a href="#">LDO2015-00328</a>	Susan L Hollingsworth MARSH LANDING COMMUNITY ASE	APPL A (trnsmtl, pond-RES/AG)	06/12/2015	06/19/2015	06/19/2015	7	DEN
Total Cases for: Susan L Hollingsworth 1							
Staff Name: ETS <a href="#">DOS2015-00037</a>	Tom Sawtell GENOVA SALES CENTER	RO1 Application (Resubmittal)A	06/18/2015	06/29/2015			
Total Cases for: Tom Sawtell 1							
Staff Name: <a href="#">COM2015-01097</a>	ESTERO - 96K ROCK	Letter of Transmittal Req'd	06/08/2015	06/10/2015	06/08/2015	0	APPR
Total Cases for: 1							
Grand Total Cases: <u>14</u>							



Department of Community Development  
 Development Services Division  
**Zoning Applications Received**  
 Village of Estero Planning Community

From: 6/1/2015 To: 6/30/2015

Case Number	Project Name	Application Type	Received Date	Target Date	Completed Date	Calendar Days	Disp.
Staff Name: AHB	Alvin Block, AICP						
ADD2015-00098	LEGACY CHURCH	PDZ Application (PD Admin)	06/12/2015	07/13/2015			
DCI2015-00016	ESTERO WAS MINOR CPD	Minor Plan Dev Application	06/26/2015	12/23/2015			
Total Cases for:	Alvin Block, AICP	2					
Staff Name: NMR	Nettie M Richardson						
MUD2015-00037	8601 JUDETH LN	MUD App(Min Use Determination)	06/12/2015	07/12/2015			
Total Cases for:	Nettie M Richardson	1					
Grand Total Cases:		3					

# Pending Development Review Cases in Village of Estero Planning Community

From 01/01/2000 To 7/7/2015

Current as of 07/07/2015

Project Name / File Number	Location	Date Received	Type of Application	County Reviewer	Project Type/ Description
COCONUT POINT HONDA 2014-00079	SFWMD ERP NO 36-03930-P must be modified and submitted prior to issuance of a vegetation removal permit.	05/22/2015	DO Submittal Small		Approved for the construction of a 30,710 square foot automobile dealership with a drive-through service area, connection to US 41 via an access on the adjacent property, a new driveway to Atlantic Gulf Boulevard, a new driveway to Galloway Ford Drive, a monument sign, multiple vehicle display pads, vehicle display areas, sidewalk connections to US 41, open parking, overflow grass parking, drainage improvements including connections to a master stormwater management system, water and sewer connections, site lighting, landscaping, and related site improvements. [CNC2014-00079]
WINE PLACE SUITES COCONUT 2015-00023		03/10/2015	DO Submittal Small		Denied DO2 04/08/2015. 114 room all suites hotel to be developed on Lot 7 (tract 2F) at coconut point area 2
NOVA SALES CENTER 2015-00037		06/18/2015	DO Submittal Small		Denied DO2 04/13/2015. A temporary real estate sales office and associated infrastructure
GLAND OAKS DRIVE 2015-00047	Off-site surety not required SFWMD ERP 36-01871-S-09 SFWMD WU 36-07482-W	06/10/2015	DO Submittal Small		Denied DO2 05/14/2015. APPROX .913 LF OF ROADWAY TO SERVICE FUTURE COMMERCIAL OUTPARCEL DEVELOPMENT WITH ASSOCIATED INFRASTRUCTURE IMPROVEMENTS
ESTERO 4.2 2015-00048	Off-site surety required	06/16/2015	DO Submittal Large		Denied DO1 05/27/2015. Clear and fill approx 4.24 acres of the subject property for future development this includes required landscape buffers as necessary and a right turn lane per FDOT
LOPPES OF COCONUT TRACE 2015-00056		06/03/2015	DO Submittal Small		Proposed Construction of a Multi-use Development within the estero pointe CPD
DRIVEWAY 2015-00087		02/11/2015	Type D Limited Review		Approval for a 2nd driveway from the existing parking lot to Block Lane (privately owned road)

Project Name / File Number	Location	Date Received	Type of Application	County Reviewer	Project Type/ Description
VER RIDGE ROUNDABOUT 102015-00109		05/19/2015	Type B Limited Review		Approved to amend the configuration of an existing roundabout and the addition of a 5 foot wide sidewalk.
WILSON WEST BAY GOLF CLUB 102015-00194		04/13/2015	Type A Limited Review		For replating of the clubhouse tract into two lots (PLT2015-00012)
WILSON RING RUN BOCCE COURTS 102015-00196		04/15/2015	Type C Limited Review		Approval of bocce courts
WILSON 3281 RETAIL HEALTH CENTER 102015-00248		06/18/2015	Type B Limited Review		Request for proposed improvements to the Vehicular Use Area and Site Plan of existing CVS store
WILSON HILLA TERRA 102015-00278		05/19/2015	Type B Limited Review		adding sidewalks and pedestrian crossing within the community along bella terra blvd
WILSON WILSON ARSH LANDING COMMUNITY 102015-00328		06/12/2015	Type A Limited Review		Request for removal of (13) trees
WILSON DONALD'S CORKSCREW SBS 102015-00356		06/25/2015	Type A Limited Review		Reconfiguring of drive-thru to accommodate side-by-side drive thru, menu boards and minor ADA compliance updates.
WILSON WILSON PRESS HAMMOCK 102015-00368	41 South to Coconut Rd, East on Coconut to destination	06/29/2015	Type A Limited Review		Sealcoat/Restripe as existing
WILSON WILSON VILLAS AT TIMBERLAKE 102015-00373		06/29/2015	Type A Limited Review		sealcoat/restripe as existing

# Pending Zoning Cases in Village of Estero Planning Community

From 01/01/2000 To 7/7/2015

Current as of 07/07/2015

Project Name / Project Number	Location	HEX Hearing Date	HEX Disposition	BCC Hearing Date	County Reviewer	Project Type/ Description	Project Size
ESTERO CROSSING <a href="#">12015-00001</a>	Northeast corner of US 41 and Williams Road, Village of Estero, Estero Planning Community, Lee County, FL.					Rezone 42.97 acres from Commercial Planned Development (CPD) to Mixed Use Planned Development (MPD) to allow for the development of a maximum of 400 residential units and 62,000 square feet of commercial use. Application includes potential for development of an Assisted Living Facility with 200 beds, gas station with 24 fueling positions, and hotel with 100 units.  Concurrent requests to amend the Mixed Use Planned Development Zoning and the Development of Regional Impact Development order to: increase the maximum number of dwelling units from 150 to 600; decrease the maximum retail floor area from 550,000 to 300,000 square feet and allow the ability to increase retail floor area with simultaneous decrease in residential units; maintain the allowed maximum intensity of 120,000 square feet of office and 150 units for hotel/motel use; revise the approve Master Concept Plan and DRI Map H to modify the location of uses permitting mixed use throughout the project, and extend the commencement and build out dates by four years and 364 days beyond the statutory extensions granted due to Tropical Storms Debby and Isaac (build out date would be July 29, 2026).	16.95 Acre
ESTERNOVA <a href="#">12015-00009</a>	9050 Corkscrew Road (southeast corner of Corkscrew Road and Via Coconut Point), Estero Planning Community, Lee County, FL.					Rezone 16.95 acres from Agriculture District (AG-2) and Commercial Planned Development (CPD) to Residential Planned Development (RPD) to allow development of up to 205 residential units with associated amenities and infrastructure. Maximum building height of 45 feet/4 stories is proposed.	

NOTE: Staff Reports are available 14 days prior to the HEX Hearing Date with the exception of Variances (VAR), Consumption on Premises (COP) and Special Exceptions (SEZ) which are available 7 days prior to the HEX Hearing Date.



# LEE COUNTY BUILDING PERMIT REPORT

## New Construction

### Village of Estero

From: 6/1/2015 To: 6/30/2015

Permit Type	# Units	# Issued	Value
Single Family		12	\$3,440,910.00
Residential Addition/Sheds (wood/CBS)		1	\$15,000.00
U/R, Gl.Rm., Vinyl Rm., Sc.Rm., Greenhouse		10	\$61,526.00
Pool Enclosure		23	\$165,224.00
Alteration/Interior Remodeling		12	\$356,533.00
Structural Slabs/All Decks (SFR Foundations)		1	\$6,749.00
Roofover/Alum/Prefab Shed/Aluminum Carports		4	\$34,840.00
Garage Door		1	\$1,002.00
Shutters		32	\$288,415.00
Window (Glass/vinyl/acrylic) Replacement		7	\$67,033.00
Window and Shutters		4	\$45,304.00
Mobile Home		3	\$96,000.00
Park Model		2	\$161,200.00
COMMERCIAL		2	\$159,000.00
AWNING/CANOPY		1	\$2,357.00
CONCRETE STRUCT. SLA/ALL DECKS		1	\$44,000.00
INTERIOR REMODEL		1	\$95,000.00
SHUTTERS		7	\$69,214.00
WINDOW (Glass/vinyl/acrylic) REPLACEMENT		6	\$25,485.00
Window and Shutters		3	\$18,991.00
Roof		6	\$102,065.00
Hood Suppression		1	\$2,000.00
Hood		2	\$5,400.00
LP Tank & Lines		3	\$6,645.00
Monitor		3	\$1,550.00
Natural Gas		6	\$8,100.00
Sprinklers		6	\$12,528.00
Underground Water		1	\$31,500.00
Fence		5	\$29,346.00
Pool - Above Ground		1	\$49,500.00
Pool - Below Ground		8	\$316,500.00
Pool w/ Spa - Below Ground		7	\$385,795.00

<b>Permit Type</b>	<b># Units</b>	<b># Issued</b>	<b>Value</b>
<b>Current Period Total</b>		<u><u>182</u></u>	<u><u>\$6,104,712.00</u></u>

# General Planning Services RFQ Response



Submitted to:  
**Village of Estero**

Submitted by:  
**ch2m**

August 2015



CH2M Atlanta  
6600 Peachtree Dunwoody Road  
Building 400, Suite 600  
Atlanta, GA 30328  
O +1 770 314 6562  
F +1 770 604 9183  
www.ch2m.com

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

105\_ESTERO\_5\_DEN

Required Qualifications	CH2M Distinguishing Characteristics	Section
Capabilities	<ul style="list-style-type: none"> <li>• Uses proven approach for partnering with client cities to mobilize city services in line with vision and goals</li> <li>• Uses award-winning program management approach that has been used to successfully manage start-ups of six cities in the Southeast.</li> <li>• Uses proven methods and templates to expedite the setup of partner services to client satisfaction</li> <li>• Has knowledge of full range of local government services, gained from its 172 public-private partnerships</li> <li>• Has experience with a variety of different plan review software packages to tailor the specification of the client’s unique needs and interest</li> <li>• Uses proven methods to align stakeholder interests, train employees, and ensure ongoing customer satisfaction with established municipal services</li> </ul>	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"> <li>• 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</li> <li>• 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</li> <li>• Under the Program Manager, CH2M will set up a target mobilization team to ensure the startup is smooth and on-time</li> </ul>	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"> <li>• CH2M currently manages 172 public-private partnerships across the country</li> <li>• For Peachtree Corners (GA), CH2M successfully established the community’s planning, zoning, and code enforcement services within five weeks</li> <li>• 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</li> <li>• 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</li> <li>• Within Louisiana, CH2M set up full municipal operations including community development services for the city of Central</li> <li>• Within Florida, CH2M currently provides community development services for the city of Bonita Springs</li> </ul>	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"> <li>• For 30 years, CH2M has been providing a full range of city services, including community development services, throughout the southeast United States</li> <li>• In the region, CH2M right now provides community development services for Johns Creek, Peachtree Corners, and Bonita Springs (FL)</li> </ul>	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"> <li>• 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.</li> </ul>	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.

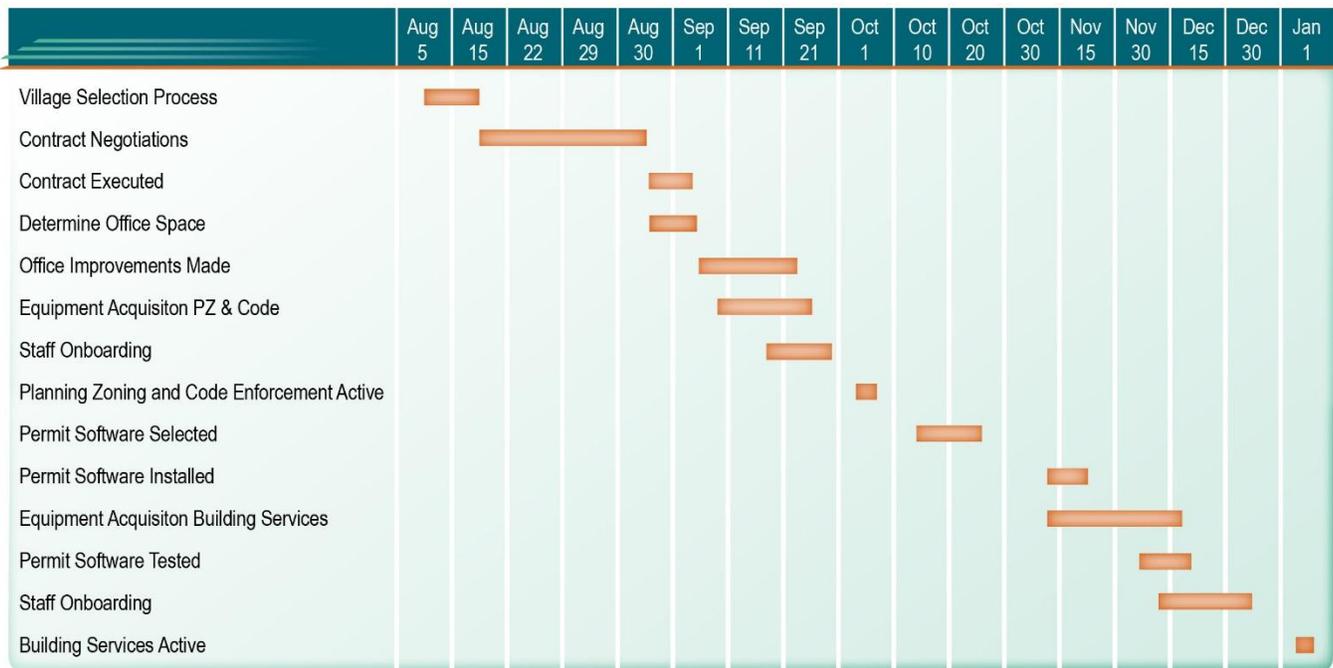


Figure 1. Milestone Table

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 orc	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.

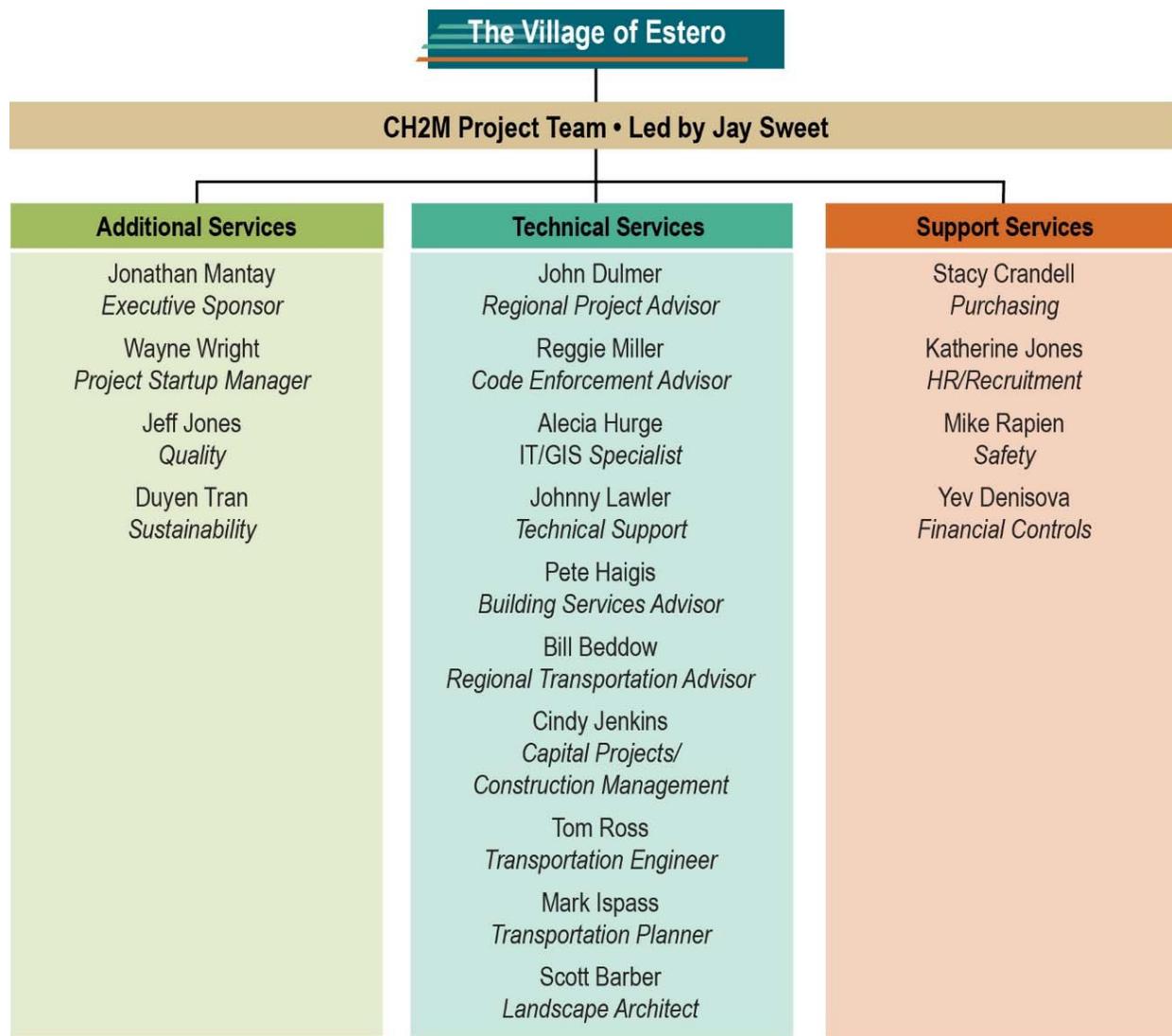
Since joining CH2M, Mr. Sweet has worked in the Bonita Springs project as both the City Surveyor and Land Planner. He has been integral in creating the framework for the Downtown redevelopment effort and was the architect of the TIF Lite concept that has enabled that effort to go forward. He also plays 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.*

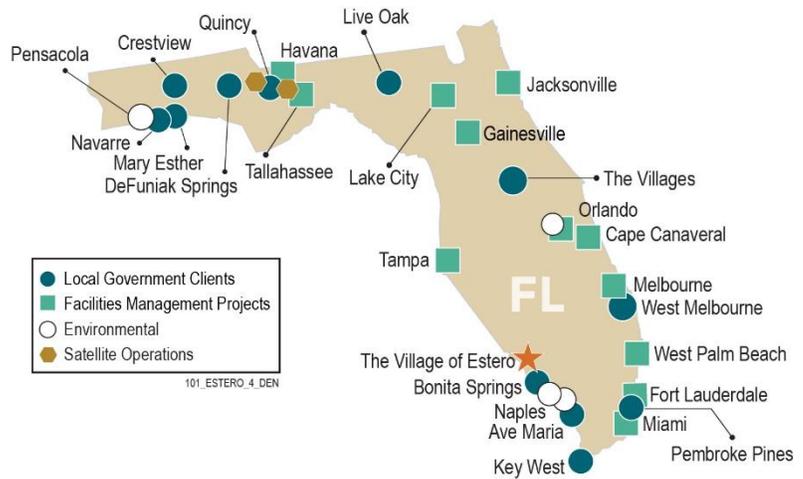
Particularly relevant to Estero is CH2M’s ability to establish public-private operations in a very time efficient and effective manner. From small communities to large urban centers, from taking on one existing city service to the start-up of municipalities for which we provide a full range of services,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

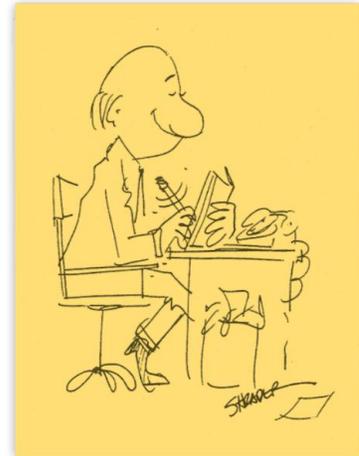
## A Member of the Community

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 <b>2011</b>	Outstanding Public Member Award by the Intelligent Transportation Society of Georgia
December <b>2011</b>	Johns Creek ranked at top in Georgia for quality of life by The Business Journals
January <b>2008</b>	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.



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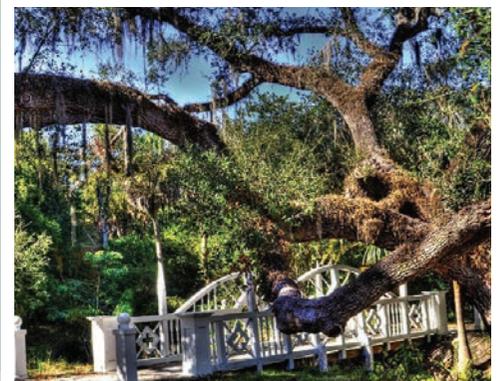
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**REQUEST FOR QUALIFICATIONS FOR GENERAL PLANNING SERVICES  
FOR THE VILLAGE'S COMMUNITY DEVELOPMENT DEPARTMENT**

**RFQ#  
2015-01**

Prepared  
For: **THE VILLAGE OF ESTERO**  
21500 Three Oaks Pkwy  
Estero, FL 33928

**Due Date/Time:  
August 5, 2015  
2:00 P.M.**



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August 5, 2015

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

**RE: RFQ #2015-01 for General Planning Services for the Village's Community Development Department**

Dear Mr. Lombardi:

**Calvin, Giordano & Associates, Inc. (CGA)** is pleased to submit our qualifications for consideration to provide **GENERAL PLANNING SERVICES** as set forth in and pursuant to the RFQ issued by the Village. We have reviewed the scope of services contemplated by the Village of Estero, and have identified a project team with the necessary experience and skills to successfully complete all requested services. Calvin, Giordano and Associates has been assisting the public sector by providing contract services for all aspects of government needs relative to planning and zoning, code enforcement, building code services, landscape architecture, engineering, traffic engineering, surveying, construction management and inspection, and GIS. **CGA is a leader is assisting newly incorporated communities establish their policies and procedures as they transition from County government.** Our staff has been instrumental with the Cities of Weston and West Park and the Town of Loxahatchee Groves in this regard.

CGA is a well-established multi-disciplinary firm headquartered in Fort Lauderdale, with satellite offices located in West Palm Beach, Port St. Lucie, Homestead, Clearwater, Jacksonville, Florida and Atlanta, Georgia. For more than 75 years, our firm has been providing consulting services to both private and public sector clients. CGA's mission is to provide innovative services that exceed client expectations. With a diverse team of professionals and technical staff, CGA possesses the expertise and experience that encompasses all facets of the planning and development process as well as all other tasks that fall under the direction of the Community Development Department

We have carefully reviewed the scope of services requested by the Village and fully understand the effort required to provide ongoing Community Development Department functions and are committed to devoting the suitable staff and resources to ensure total success.

I, Shelley Eichner, AICP will serve as the Principal-in-Charge and Sarah Sinatra Gould shall serve as the Project Manager.

**PRINCIPAL-IN-CHARGE**

Shelley Eichner, AICP  
Senior Vice President  
seichner@cgasolutions.com  
Office: (954) 921-7781  
Fax: (954) 921-8807

**PROJECT MANAGER**

Sarah Sinatra Gould, AICP  
Planning Department Director  
ssinatra@cgasolutions.com  
Office: (954) 921-7781  
Fax: (954) 921-8807

Building Code Services  
Coastal Engineering  
Code Enforcement  
Construction Engineering and Inspection  
Construction Services  
Contract Government  
Data Technologies and Development  
Emergency Management Services  
Engineering  
Environmental Services  
Facilities Management  
Indoor Air Quality  
Landscape Architecture  
Municipal Engineering  
Planning  
Public Administration  
Redevelopment and Urban Design  
Surveying and Mapping  
Traffic Engineering  
Transportation Planning

**GSA Contract Holder**

1800 Eller Drive  
Suite 600  
Fort Lauderdale, FL  
33316  
954.921.7781 phone  
954.921.8807 fax

[www.cgasolutions.com](http://www.cgasolutions.com)

Thank you for giving us the opportunity to respond to this request for qualifications. I know that given the opportunity, CGA's extensive county and local government experience and expertise can provide the quality services the Village of Estero desires and expects.

Sincerely,

**CALVIN, GIORDANO & ASSOCIATES, INC.**



Shelley Eichner, AICP  
Senior Vice President

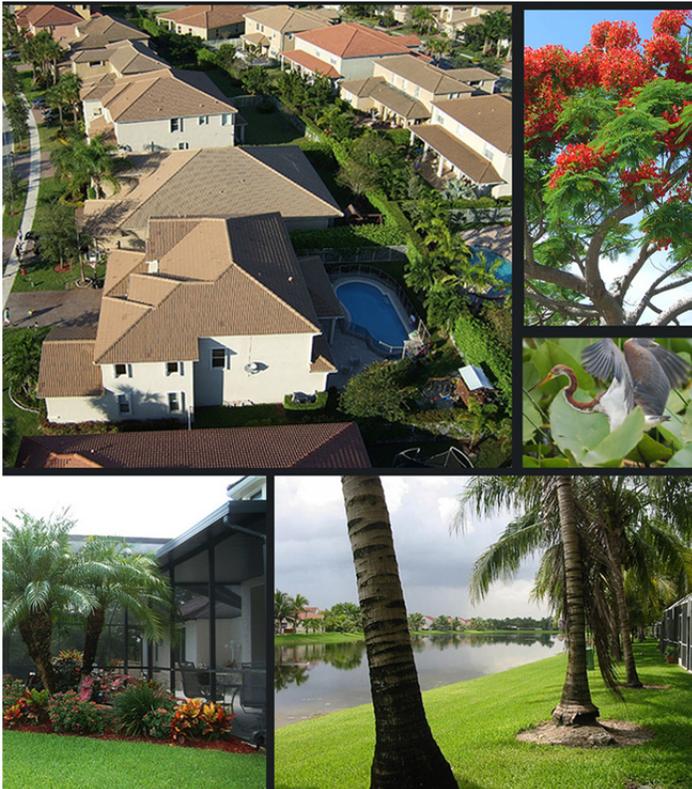
## MISSION

Calvin, Giordano & Associates', Inc. (CGA) mission for the implementation of our services, is to provide cost effective, customer centered services for the effective implementation and enforcement of the Village of Estero, Lee County and the State of Florida Ordinances, Laws and Codes. Our mission includes making Village of Estero Community Development Department an exceptional place to do business.

The professional staff at Calvin, Giordano & Associates, Inc (CGA) has an extensive amount of experience in providing contract government services, specifically to newly incorporated municipalities. Our expertise has been obtained over the past two decades of contract government services throughout the State of Florida. The proposed CGA staff possesses decades of hands on experience in operating local government entities both as in house employees and as contract service providers. These are the individuals that will be dedicated to the successful service delivery for the Village of Estero. CGA's various divisions have successfully accomplished the transition to contract services in the Town of Davie CRA, City of Deerfield Beach, Town of Lauderdale By The Sea, Town of Loxahatchee Groves, City of Pompano, Town of Surfside, City of Weston and the City of West Park as well as numerous other municipalities with hourly "as needed" contracts. CGA has successfully accomplished dozens of transitions for a variety of services including but not limited to, Planning and Community Development, Building Code Services, Engineering, Project Management, Public Services and Code Enforcement in numerous other Florida municipalities. The approach and philosophy that CGA applies to transitioning service delivery is to ensure the integration of existing and new resources. Specifically we will identify and define the scope of work, expectations and deliverables.

### Experience with Newly Incorporated Municipalities

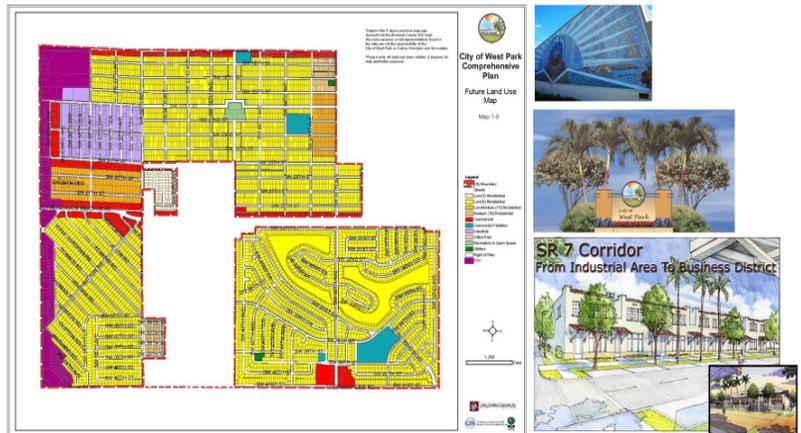
CGA completed the first Comprehensive Plans for the **Cities of Weston, West Park and the Town of Loxahatchee Groves** soon after their incorporation.



**City of Weston.** The City of Weston is a master planned community consisting of 25 square miles located in western Broward County. The area was originally developed in the 1980's by the Arvida Corporation and its Indian Trace Community Development District. During the early 1990's, as residents began to populate the area, it became apparent that County government, located over twenty miles away did not understand the goals of the residents. Furthermore, as a tax "donor" community, many of the financial resources generated were used to fund projects outside of the area. On September 1, 1996, the residents voted overwhelmingly to incorporate to ensure that control of land use, zoning and maintenance of the "Weston" lifestyle was established and maintained. Six months later, an additional 1200 acres that was developed much earlier was annexed. CGA, as the district engineers, took on the role of city staff (planning, engineering, and landscape architecture) in this contract city. CGA continues to provide planning, engineering, landscape architecture as well as code compliance services for the City.

**City of West Park.** The City of West Park incorporated in 2005 to ensure redevelopment received focused attention and that services such as code enforcement were provided on a level equal to incorporated cities.

CGA prepared the first comprehensive plan and first zoning code to reflect the need for redevelopment, urban design principles, and park and open space for residents. CGA continues to provide ongoing municipal planning, building and code compliance services for the City of West Park.



**Town of Loxahatchee Groves.** The Town of Loxahatchee Groves is an eclectic semi-rural community where some residents wished for few regulations and others desired a more environmentally friendly approach to existing and future development. The Town incorporated in 2006 to protect this rural, agricultural community at the edge of urban development in Palm Beach County. Calvin, Giordano & Associates was hired to prepare the Town's first Comprehensive Plan.

A major challenge was to balance the needs and oftentimes conflicting desires of residents, landowners, and the independent Water Control District and develop a set of goals, objectives, and policies for the Comprehensive Plan. A visioning process was undertaken to determine the needs and desires of the various groups on a variety of issues to create a strategic plan for the Town. The strategic vision plan was the guiding tool in developing the Comprehensive Plan. Throughout the process, staff regularly communicated and met with elected officials, Town staff, and residents to ensure that the plan is reflective of the community. Public workshops focused on common themes and consensus building to craft a Comprehensive Plan that suited such varied interests.

Prior to final adoption, drafts of the plan were readily available in print and on the Town's website and stakeholders were encouraged to review and provide comments on THEIR plan.

The adopted Comprehensive Plan focused on balancing agricultural uses with residential uses, supported equestrian trails, and protected the overall rural lifestyle of the Groves while meeting all the state statutory requirements.



## TRANSITION PLAN

The professional staff of CGA has an extensive amount of experience in contract government services for both existing and new municipalities, transitions and new start-ups; entire organizations, or partial services, or specific projects. The same CGA staff who assisted in the transition to contract government are those individuals who have been selected for the successful service delivery for the Village of Estero. The following approach will be subject to the guidance and needs of the Community Development Director, Mary Gibbs and the Vice-Mayor, Howard Leviton, as the Planning and Zoning Liaison.

The approach and philosophy that CGA applies to transitioning service delivery is essentially ensuring the integration of existing and new people and resources, and specifically defining work programs and expectations/deliverables. Our recommended approach, which is of course flexible to the Village's interests, is defined in three functional areas; 1) Discovery/Introductions, 2) Definition of Work Programs/Processes, and 3) Start Up/Implementation. There is overlap amongst the three components as some elements of each of the three functional areas will occur concurrently. CGA will dedicate any and all support staff during the transition period to ensure smooth progress and success. The Transition Plan detailed in the three functional areas, following contract execution, is more specifically defined as follows:

1. Discovery/Introductions
  - A. Key Village and CGA Personnel Introductions and Relationship Building
  - B. Define Specific Roles and Relationships for Village and CGA Personnel
  - C. Identification of Resources, Time, Technology, Equipment, etc.
  - D. Data Research and Gathering for Critical Information
2. Work Program and Processes
  - A. Define Specific Areas of Work Program
  - B. Evaluate Processes and Recommendations for Improvement
  - C. Integration of Personnel and Resources
  - D. Define Performance Measures. Written Procedures, Checklists
  - E. Define Customer Service and Ethics Expectations
  - F. Conduct Training
3. Start Up/Implementation
  - A. Finalize Work Assignments and Resource Allocations
  - B. Gather, Share, and Assimilate Feedback Amongst Staff
  - C. Establish Customer Satisfaction Surveys
  - D. Provide "Hands On" Supervision and Communication
  - E. Initiate Operations, Continually Cycling Management, Evaluation, Training, Feedback

## PLANNING

With a diverse team of professionals and technical staff, CGA possesses the expertise and experience that encompasses all facets of the planning and development process. CGA provides current, comprehensive planning and/or zoning services throughout Florida and several of our planners currently serve as consulting staff members as well as Community Development Directors for several municipalities. This responsibility requires complete understanding of planning policy and historic precedence to equitably administer zoning and development codes. This role also requires stellar written and verbal communication skills and the ability to maintain professional working relationships with not only colleagues and staff persons but also municipal officials, neighborhood activists and the community at-large. CGA recognizes the uniqueness of each community and easily adapts to a variety of environments. The contract government model's effectiveness has been tested in all of these areas with positive results.

### Comprehensive Planning

CGA's multidisciplinary team members have worked together to build a long resume of providing comprehensive planning services throughout our many years of experience. An important component of those plans and long-term visions typically include analyses and discussions on environmental protection, prevention of sprawl, housing opportunities, improving neighborhoods, building upon existing community character, coordinating infrastructure improvements and maintaining and improving quality of life.

### Land Development and Zoning Codes

CGA has prepared codes which have assisted municipalities' in their desire to either attract new development, create greater safeguards from development that appears too intense or to clarify code language for ease of use. Some of these ordinances include TOC and TOD ordinances, an overlay district to accommodate places of public assembly consistent with the Religious Land Use and Institutional Persons Act (RLUIPA) and corridor analyses resulting in codes to help manage large lot aggregation to avoid over development. Other new zoning concepts include the preparation of solar panel and car charging station ordinances. In this case, the municipality wanted to encourage green technology, but understood the importance of having regulations in place for aesthetic purposes. These ordinances provided the municipality with those protections, while not hindering sustainable designs.

CGA also has experience developing and implementing hybrid form-based codes. With this experience we can prepare strategies that can improve the plans through text and map changes to reflect 21st Century development patterns and techniques.

### Development Review

CGA has undertaken the role of both leading and supporting planning and zoning departments in several newly incorporated communities for more than 15 years. A common theme that all of these communities have is a desire to set their own destiny in terms of planning and zoning. The City of Weston incorporated in 1996 and the City of West Park incorporated in 2005. From the beginning, CGA has handled all of the planning and zoning activities for these two cities. We have developed all of the policies and procedures for planning and zoning reviews, modified and updated all comprehensive plans, codes and land development regulations. CGA also leads the Planning Departments in the Towns of Surfside and Medley. While these are long time established municipalities, both towns lacked full service departments and had serious deficiencies in their processes. CGA has formalized the development process and created standards for applications, including timeframes for completion of tasks.

CGA provides current planning and development review/zoning services to several municipalities throughout Florida and acts as the primary Development Review Committee (DRC) contact. CGA's planning staff possesses a thorough and complete understanding of planning processes from both a public and private perspective and from municipal to state authority. CGA staff participates in and regularly attends conferences and seminars at the local, state and national levels in order to keep abreast of trends in planning.

Our planning and zoning staff are instrumental in shepherding projects from development review through completion of construction. They generally coordinate all disciplines involved in development review, permit issuance and construction through certificate of occupancy (CO). CGA can create a schedule for Development Review, based on the level of service required by the Village, including a set time for staff to review plans, provide comments and meet with the applicant.

The process that we engage in as a reviewing entity starts off with conducting a site visit once we receive a set of the plans from the Village. Over the years, this has been a critical component to ensure that the comments generated are poignant to the development of the project and addresses current on-site conditions. Depending on the project, the initial site visit can also be coordinated with Village Staff, particularly if there are sensitive considerations that need to be accounted for, such as proximity to critical land uses or utilities or the presence of valuable natural resources that deserve a complete analysis. Specifically, by conducting this site visit we have been able to verify vegetation that is mislabeled, omitted or incorrectly accounted for on the plan's included surveys.

An example of a Development Review process is as follows: applications are submitted to the Planning Department. Staff reviews the application for completeness and circulates to the Development Review members. Staff has 10 calendar days to review and provide written comments to the Planning Department. The Planning Department compiles the comments and forwards the applicant the written comments prior to the Development Review meeting. Prior to the meeting with the applicant, CGA staff will always seek to coordinate with Village Staff and other reviewing consultants, as needed, to mediate any potential conflicts in comments being generated by the various team members. Staff also encourages a pre-application meeting prior to submitting a site plan, rezoning, variance, or other development plan to confirm the applicant understands the process.

It has been our practice to work closely with municipal Staff in the development of the comments and in attending any pre-application meeting coordinated with the applicant prior to officially submitting a site plan.

After the final revisions and upon review of the site plan by the DRC members, the site plan will be scheduled for public hearings, if applicable. If needed and upon request by the Village, CGA staff can prepare draft staff reports for the Planning and Zoning Commission and Village Council and attend the scheduled meetings to answer questions or provide any further clarifications.

## Historic Preservation

CGA's planning staff work in a variety of settings, including some jurisdictions with significant historic features. CGA is currently working with the Miami-Dade County Historic Board to introduce incentives for historic preservation within the development process. We also have experience analyzing zoning code impacts to historic districts and have been involved in projects that successfully incorporate historic structures into new development schemes. The Surf Club, is a private club in Surfside, Florida, was designed by Russel Pancoast and built in 1930. It was a winter spot for celebrities and politicians of the

time and the site is made up of four acres of oceanfront property. It had many additions and renovations, but the original plans were discovered. A developer purchased the site with the intent of building a large condominium hotel. CGA staff, on behalf of the Town, worked with the Historic Board and the developer to support a project sensitive to an important historic structure. The developer is currently restoring the project to its former glory and, for the first time since it was constructed, opening it to the public as the primary feature of their development.

*Original Surf Club from 1930s*



*Proposed historic renovation and coordination with future development*



## Transportation Planning

In today's transportation focused market, virtually every regional planning activity and site-specific development involves assessing traffic-related impact. From our combined experience in managing FDOT, municipal and developer driven transportation projects, we have developed a mutually beneficial approach that integrates both public and private-sector perspectives. We currently provide transportation municipal services to many local governments as well as being the district-wide general planning consultant for FDOT District 4, assisting with developments of regional impact, methodology letters of understanding, transportation planning, interchange review and traffic analysis review.

Our Traffic Engineers are a part of the review process for all land development applications and will provide the Village with a comprehensive, non-biased approach to ensuring the Village's interests are protected.

### Environmental Review

CGA has extensive experience with environmental review and provides on-going environmental services to a number of municipalities. CGA is responsible for the environmental resource management and environmental planning services to the City of Weston including, wetland mitigation and permitting, invasive and exotic vegetation control administration, site plan review landscape inspection services and annual landscape inspections. CGA reviews all development applications for compliance to the City's landscape and tree preservation codes.



CGA has environmental specialists on board who can maintain the Bald Eagle data and staff the advisory committee. CGA has acted as certified endangered species monitor in multiple construction projects throughout the state of Florida. Each project required the observers be certified and approved through the FFWCC. The majority of our observers have advanced degrees in their respective fields.

## GEOGRAPHIC INFORMATION SYSTEMS (GIS) AND INFORMATION TECHNOLOGIES (IT)

### GIS

The Data Technologies and Development Department at CGA has been involved in the full spectrum GIS development for over 16 years, inclusive of, but not limited to, data development, data management, QA/QC, generalized mapping, data collection, data analysis, customize GIS web applications and GIS web hosting, just to name a few. CGA has also been an ESRI Business Partner for over eight years. This position allows us to leverage additional resources from the world's industry leader to ensure that our client's needs and requirements are met with the highest standards.

CGA has installed an optimum GIS network environment to handle most client needs. There are two network environments specifically dedicated for GIS, in an effort to provide the highest level of quality service and support. During the initial planning stages of all GIS projects, CGA conducts an assessment to become familiar with not only the project requirements, but also the goals, objectives and expectations of the stakeholders. In addition, other components of the assessment include the project responsibilities of both CGA and government agency staff.

CGA has on staff GIS professionals with various specialties such as:

GIS Design	Application Development
GIS Analysis	Desktop GIS
Emergency Management	GIS Web Applications
Land Surveying	GIS Web Hosting
Public Works / Utility Mapping	Client Server GIS Applications
Cadastral Mapping	Database Customization
GIS / RDBMS Management (DBA)	Mobile GIS Application Development
Database tuning and performance	Real-time mobile GIS "INKforce"
	Disconnected GIS

CGA is an authorized ESRI Business Partner, Microsoft Certified Partner, and have developed INKforce™, a GIS based mobile application for Code Enforcement Tracking (CET), Building and Permitting Tracking (BPT), Fire Inspections Tracking (FIT), Planning and Zoning (PNZ) and Business Tax Receipts (BTR).

### IT

CGA's Data Technologies and Development Department offers professional experience in the field of IT. Our knowledge spans from Desktop Support to complex Network Implementations. We have been involved with municipal agency contracts ranging from stepping into evaluating and managing an existing environment to designing, planning and implementing a new environment. Our different levels of expertise allow us to provide the right professional depending on the task that you require. We tailor our service specifically to your needs.

## BUILDING CODE SERVICES

Norman Bruhn, Director of Building Code Services, will be the lead contact for the CGA Building Department for the Village of Estero. Norman is a State of Florida Licensed General Contractor and Building Official with over 30 years of experience in the construction industry. Peter Beaudoin, State of Florida Certified Building Official, will assist him with over 20 years of experience in Building Departments. The Building Code Services Division management team will provide the Village with strong management focused on customer service.



### Building Code Operations

The CGA Building Code Services Division is prepared to provide an efficient and friendly Building Department to serve the Village of Estero and its customers. The CGA Building Division is comprised of more than 50 full-time experienced employees with the dedication and knowledge required to properly provide Building Code Services. The Building Code Services Division has many responsibilities. Every aspect of the permitting process is very important. The process can be broken down into five functional areas. Of course each functional area has overlap and depends on the success of each for the success of the Division. The five functional areas are:

- Permit Intake
- Plan Review/Processing
- Inspections
- Permit Closeout (Certificates)
- File Maintenance

### Permit Intake

The customer service counter is the face of the Building Division. When a customer enters the department it is the permitting staff's responsibility to make the customer's experience positive. The staff will be dressed in a professional logoed shirt. CGA staff will provide an efficient and professional experience for the customer. Each customer will be greeted and receive an acknowledgement that they will be assisted in

a timely manner. Staffing at the customer service counter will fluctuate as needed to maintain a minimal wait time. CGA's permitting staff's experience and training will provide seamless customer service.

- All permitting professionals will dress appropriately. Professional color coordinated logoed shirts.
- FRIENDLY and PROFESSIONAL staff.
- Digital permit applications will be utilized for small single use permits including water heaters, air conditioner change outs, and re-roofs.
- Permit checklist will provide the customer with the information needed to assist in the process.

## Plan Review and Processing

Permit application and plans will be reviewed with a goal of five business days. We understand that fluctuations in the workload may not always allow us to maintain that threshold but all reviews will be completed in no more than 10 business days for large projects and five business days for minor permits. This is accomplished by having an efficient system and a qualified staff. CGA plan reviewers will provide approval to all applications when the file is in compliance with the applicable laws, codes and ordinances. If the permit file is found to be deficient, concise comments will be provided identifying the deficiencies. CGA staff will provide the customer with a clear path to approval. All plan reviews will be documented in the permitting software at the time the review is complete. When all disciplines and departments have approved a file the permit will be processed immediately, the customer will be contacted and the permit will be issued. CGA understands that a day delay by any one individual in this process will delay the entire project and is unacceptable.

- Provide qualified and experienced professionals trained to provide efficient and effective reviews.
- Provide concise comments specific to the project. The review comments will provide a clear path to approval.
- All review staff will be available for customer consultations for professional and friendly assistance.

## Inspections

CGA will provide several customer friendly methods to request an inspection. After scheduling an inspection, our inspectors will provide a complete and efficient inspection. The inspection staff is trained to reduce cost with effective inspection routing. Every inspector will be provided with mobile electronic access to the permitting software for real time data entries into our INKforce system. CGA is always leading the way in terms of applying automation and technology to improve and expedite service delivery. INKforce is also utilized in the Code Compliance process, which results in a fully integrated system. Inspection staff are trained to assist customers in the field. This is accomplished by managing the inspection requirements on a project. The inspectors will review the project and inform the customer of the next required inspection and any items needed for the inspection. By planning ahead with the customer the inspector is able to reduce the number of visits required to a project, resulting in a code compliant project.

- Implement inspection-scheduling procedures.
- Provide electronic access in each inspector vehicle. This will increase productivity and customer service. Customers will be able to view the inspection results in real time to allow them to move forward with the project.
- Effectively route inspections.

- Provide inspection management. This process provides guidance to the customer with communications at the site. The inspectors will review the project and inform the customer of the next required inspection and any items needed for the inspection.



## Permit Close Out

The successful completion of a permit includes the permit closeout. This step of the permitting process is sometimes not given the level of effort it is due. This process includes reviewing the file to ensure that all documents have been received and completed. Producing all required certificates (certificate of occupancy or completion) and insuring that copies have been transmitted to the property appraiser's office for assessment. Organizing the file for effective record keeping is a necessary part of the process.

- Implementation of a tracking system for permit closeout.
- Issuing a letter for all permits that will expire in the next 45 days. This will assist in reducing the number of incomplete/expired permits.
- Issuing a letter for all permits that have expired. This will allow the permit holder to act prior to the need for a new permit under Florida law.

## File Maintenance

The permitting staff is also responsible for accurate and consistent file maintenance. This appears to be a simple process but is often overlooked. CGA utilizes a simple but effective method to organize the permit

files. Every file receives a permit number and is filed in numerical order by the permit number. The files are organized into three categories; files in process, issued permit and completed permits. Every CGA staff member is familiar with the filing system and can locate a file without assistance.

- Ensuring that all files are correctly marked with a valid permit number.
- Centralizing all permit files into 3 categories. (in review, issued, closed)
- Prepare each file for scanning during the closeout process.
- Assist in facilitating the complete implementation of electronic file storage. Work to make each electronic file available online.

### **Floodplain Review**

CGA's building division provides complete floodplain management with certified floodplain managers. This allows the building division to provide a single solution to our customers. We provide services including, assisting a community to join the national flood insurance program, ordinance development and plan review.

## CODE COMPLIANCE

### Management Plan

As a result of our hard work and dedication to our clients, we have been able to grow our Code Compliance Department to over 25 staff members. Our supervisors average 25 years of municipal and private experience in the code compliance arena. Every code compliance officer is FACE certified and many have obtained multiple FACE certifications. Each project staffing level varies accordingly with the geography, population and scope, but in most cases CGA provides our clients with the Supervisor, Lead Code Compliance Officer, Code Compliance Officers, Lead Administrator and Code Administrators. The full service compliment of staff allows us to streamline the entire process including the Hearing Examiner process.

### Operations Plan

CGA will implement a comprehensive turnkey code compliance program for the Village applying the following principles and business model. CGA will assign full time dedicated field inspectors, who will work proactively in the field, not reactively from the office. GIS based maps and field activity will be monitored by management in person, as well as by electronic tracking devices installed in all vehicles.

CGA will carefully select personnel with positive, flexible, customer service orientated attitudes; who are able to create a "results" oriented approach, not a traditional "process" oriented approach. Secondly, CGA will provide ongoing professional development training to all staff members, to "train up" individual abilities. Customer Service will continuously be reinforced as a top priority that we, CGA, are providing on behalf of our client, the Village, to all of its local citizens. A proactive, in the field, "on view" philosophy of identifying code violations (based upon established priorities with the Village) will be implemented by all staff, as opposed to solely a reactive complaint driven approach which is traditionally utilized. In this manner, far greater productivity, volume and results in terms of public contact and code compliance will be achieved. Our INKforce software fully automates all Code Compliance and Hearing Examiner functions, forms and data. Municipal code compliance is a very long, detailed, labor intensive process; especially if conducted in a manual, hard copy, traditional process. INKforce removes many of the manual mundane tasks associated with the Code Compliance process. By automating the process we are able to minimize user errors, which can cause cases to be lost or thrown out, are greatly reduced.

### Service Level Improvement

CGA's business model for providing municipal Code Compliance Services is designed and operates in a manner that allows it to be more efficient and effective than traditional manual systems, with approximately one-third less staffing resources; along with realizing a commensurate cost savings. Every step, process and form of the Code Compliance process from initial information through compliance is fully programmed and automated in the **INKforce** software. Additionally all staff members work on laptops in the field, with real time Internet connection and printers, in their vehicles, to expedite information and customer friendly service delivery. Necessary information is entered into electronic versions of forms, notices, agendas and correspondence, which are systematically generated by the software; saving a great deal of time and manual hard copy labor. Staff members are able to use their time more efficiently in the

field working with residents and businesses to improve and maintain their properties through compliance. This automated process results in cost efficiencies and expedited compliance for the Village and residents.

In addition to automating the day to day forms, including NOV, Hearing Examiner Agendas, and orders, INKforce also delivers automated reporting which includes, but is not limited to:

- Daily, weekly or monthly total NOV and Complaint Reporting
  - Includes complaint/NOV type and quantity
- Heat map reporting
  - Allowing Village Staff and CGA Management to efficiently dispatch additional staff when needed
- Automated Hearing Examiner agenda creation



This business model and approach, coupled with a committed priority to productive attitudes, training, professional development, and customer service, allows for increased services, at a lower operating expense. This model is currently operating successfully in the cities of Deerfield Beach, Pompano, Weston, and West Park and the Town of Lauderdale-By-The-Sea.

### CGA TRAINING AND SAFETY STANDARDS

CGA prides itself on maintaining a high level of efficiency and safety. We have found that a safe working environmental lends itself to an efficient working environment. This starts with a quality, highly trained staff. CGA team members are trained on a continuous basis utilizing several methods. CGA provides in house training through professional programs, mentoring, continuing education, participation in local seminars, and participation in training opportunities. Recent training of Code Compliance Division staff includes but is not limited to:

- 1) Florida Association of Code Enforcement (FACE)
- 2) CGA on boarding and in-house customer service training
- 3) Voluntary self-performed in house safety audits and reporting
- 4) Monthly safety tailgate meetings

All CGA employees receive proper Personal Protective Equipment (PPE) and the associated training. CGA is in the process of expanding our OSHA training. We currently have over 25 employees that are 10-hour OSHA certified, including Chris Giordano.



# PRESS RELEASE

City of Pompano Beach

100 West Atlantic Boulevard | Pompano Beach, FL 33060

Press Release Date: 5/15/14

## City Receives High Marks on Customer Service Survey

In March of 2010 and April of 2012, Customer Service Surveys were conducted for residents with the goal of benchmarking and improving City services. The surveys were taken from a cross section of City of Pompano Beach residents by an outside firm to determine their attitudes and perceptions towards various City services. In April of this year, the third follow-up Customer Service Survey was completed. Numerous programs and initiatives set in motion after the first survey were continued and new ones were created to continue bolstering citizen satisfaction based on the 2012 survey results.

The results of the third survey are extremely encouraging and speak to the success of staff initiatives to improve customer service in the City of Pompano Beach.

The overall impression of the City of Pompano Beach was rated as very positive with 93.8% of the respondents indicating that their impression was either favorable or very favorable. This rating is up from 60.5% in 2010 and 87.2% in 2012. Conversely, only 0.5 felt the impression of the City was unfavorable, down from 7.3% in 2010 and 1.3% in 2012. The performance of the City government has significantly increased since 2010 by 44.2% with favorable or very favorable rating of 83.3%.

Additionally, building and permitting improved from 56% approval in 2010 to almost 88% in 2014. Code Compliance improved from 43% in 2010 to over 92% in 2014. Another survey question that received very positive results was citizen satisfaction with interactions with City employees which is up to 96.8%.

This Customer Service Survey is confirmation that the City of Pompano Beach continues to make great strides in improving City services customer satisfaction. With this very important feedback we will continue our effort to improve our City's customer experience.

The entire 2014 Customer Service Survey results can be viewed by visiting the City's web site at [www.pompanobeachfl.gov](http://www.pompanobeachfl.gov).



## SECTION 2 PROJECT EXPERIENCE

See the following pages for some examples of Calvin, Giordano & Associates' project experience relevant to the scope of work specified in this RFQ.



## PEMBROKE PINES BUILDING CODE DEPARTMENT Pembroke Pines, Florida



The City of Pembroke Pines is one of the largest cities in Broward County, and at one point was the fastest growing in the nation. The City maintained a sizable building and zoning department to accommodate the robust activity. However, as economic conditions slowed, resulting in major decreases in building activity, the City was forced to evaluate options to cut costs and provide building and zoning services. The City chose to contract the overall Building Department services to a private contractor. In June, 2009 the Pembroke Pines City Commissioners voted to approve a multi-year contract with CGA to administrate the City's Building Code Services.

As a result of CGA's service delivery as a "turnkey" contract government services provider; the city eliminated its entire annual operating deficit and enhanced customer service.

### Client

City of Pembroke Pines

### Contact information at time of project:

Charles Dodge  
City Manager  
10100 Pines Boulevard  
Pembroke Pines, FL 33026  
(954) 431-4884

### Project Date

July 2009 - Current

### Services Provided

Building Code Services

### Principal in Charge

Dennis J. Giordano

### Team Members

Norman Bruhn  
Joanne Maglietta  
George Desharnais

### Company Role

Prime



## CODE COMPLIANCE SERVICES Pompano Beach, Florida



CGA has provided the Pompano Beach with Comprehensive Code Compliance services since 2010. CGA has implemented our automated software INKforce, which has allowed us to increase our compliance officers time on the streets to 99% and reduced their in office time to less than 1%. This increased efficiency and presence on the streets has fueled our dramatic increase in the City's resident customer satisfaction survey, which has seen an increase of resident satisfaction of the code compliance department from 43% in 2010 to 92% in the most recent survey conducted in 2014.

### Client

City of Pompano Beach

### Contact information at time of project:

Dennis Beach  
100 West Atlantic Blvd  
Pompano Beach, FL 33060  
(954) 786-4600

### Project Date

2010 - Current

### Services Provided

Comprehensive Code  
Compliance

### Principal-in-Charge

Dennis J. Giordano

### Team Members

William Johnson  
Mario Sotolongo  
Bernard Pita

### Company Role

Prime



## LAND DEVELOPMENT PLANNING SERVICES Surfside, Florida



CGA was selected to provide review of land development plan services for the Town. CGA met this challenge by providing planning personnel that were knowledgeable about Town and County Codes and local interagency coordination. The entire CGA multi-disciplinary team serves as an available resource.

CGA planning staff is available to the public during all regular working hours and attends Town and all necessary inter-local government meetings. CGA planning staff reviews and processes commercial and residential development projects; reviewed and processed all specialized planning functions such as variances, conditional uses, FLUM and zoning amendments as well as text amendments; prepares all necessary staff reports and CGA works closely with the Town administration, Code Compliance and Building Departments to provide seamless, efficient services to the community.

CGA also prepared the Town's EAR-based Amendments. The project included revised Comprehensive Plan Data Inventory and Analysis including current transportation data, population projections, and housing analysis. The revised Goals, Objectives, and Policies reflected Surfside's interest in incorporating many of the concepts advanced in the November 2006 Townwide Charrette. Additionally, consideration was made to assure the Comprehensive Plan addressed improved transportation along Collins and Harding Avenue.

### Client

Town of Surfside

### Contact information at time of project:

Guillermo Olmedillo  
Town Manager  
9293 Harding Avenue  
Surfside, FL 33154  
(305) 861-4863

### Project Date

2006-Present

### Services Provided

Planning and Zoning  
Civil Engineering  
Landscape Architecture  
Data Technologies

### Principal in Charge

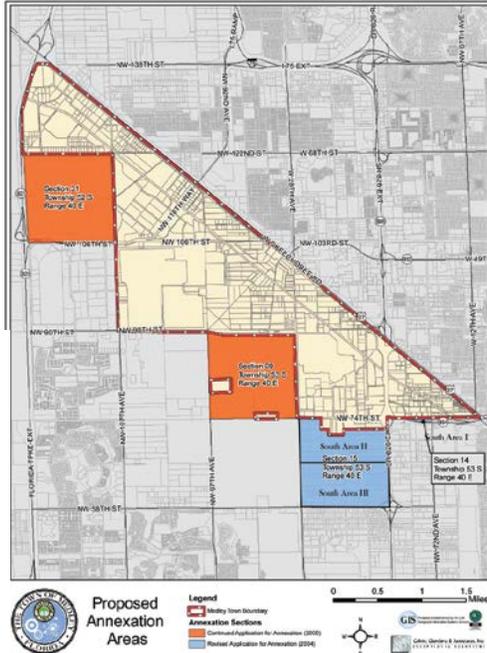
Shelley Eichner, AICP

### Team Members

Sarah Sinatra Gould, AICP  
Robert McSweeney, PE  
Gianno Feoli, ASLA, AIA  
Chris Giordano



## MEDLEY PLANNING AND ZONING Medley, Florida



### Client

Town of Medley

### Contact information at time of project:

Jorge Corzo, PE, CFM  
Town Engineer  
7777 NW 72 Avenue  
Medley, FL 33166  
(305) 887-9541 Ext. 143

### Project Date

2009-Present

### Services Provided

Planning and Zoning  
Emergency Management

### Principal in Charge

Shelley Eichner, AICP

### Team Members

Sarah Sinatra Gould, AICP  
Matine Jou

### General Planning and Zoning Services

CGA staff has been designated as the Town Planners. In this role, CGA staff reviews all site plans and performs zoning permit reviews for all building permits. Staff interacts with the public and Town staff on a daily basis and performs all day to day planning and zoning activities required by the Town.

### Emergency Management

CGA has assisted the Town in the preparation of their Comprehensive Emergency Management Plan as well as hosted “table top” exercises to prepare the Town Staff in case of an emergency.

### EAR-based Comprehensive Plan Amendments

CGA responded to the Objections, Recommendations and Comments (ORC) Report for the Town of Medley’s EAR-based Amendments. Our comprehensive planning team successfully took action on State of Florida concerns including environmental issues related to solid waste facilities located in the Town, HB697 greenhouse reduction strategies, and water supply planning. The EAR-based Amendments were found in compliance by the State in April 2009.

### Annexation Study

CGA prepared the Medley Annexation Study according to the requirements of Chapter 20, Article I, Section 20-3 of the Miami-Dade County Code to document the key characteristics and impacts of the proposed annexation by the Town of Medley. The Town decided not to proceed with the proposed annexations at that time, but may consider the annexations in the future.



## GENERAL PLANNING SERVICES Weston, Florida



### Client

City of Weston

### Contact information at time of project:

Denise Barrett  
Director of  
Communications  
17200 Royal Palm Blvd  
Weston, Florida 33326  
(954) 385-2000  
dbarrett@westonfl.org

### Project Date

1996-Present

### Services Provided

Planning and Zoning  
Comp Plans  
EAR  
Traffic Engineering  
Civil Engineering  
Environmental Services  
GIS

### Principal in Charge

Shelley Eichner, AICP

### Team Members

Sarah Sinatra Gould, AICP  
Sandra Lee, AICP CEP,  
LEED AP BD+C  
Bill Tesauro

CGA has provided professional planning services to the City of Weston since its incorporation in 1996. Services include site plan review, variances, conditional use applications, and future land use map amendments. CGA has prepared all development standards, design guidelines, land development regulations and administrative materials related to planning for the City of Weston.

CGA personnel are on call to provide the public with day-to-day zoning assistance as well as presentations to the City Commission. Planning functions include intergovernmental coordination with County and neighboring cities on key land use issues.



## SECTION 3 RESUMES

See the following pages for resumes of all key personnel.



## Shelley Eichner, AICP

Senior Vice President

### SUMMARY OF QUALIFICATIONS

Ms. Eichner is a Senior Vice President and a Partner of Calvin, Giordano & Associates and oversees all private sector and public sector planning activities. She has over 30 years of diversified planning and platting experience in securing land development approvals, land use plan amendments and local government planning.

Ms. Eichner previously served as Senior Planner for Broward County's Department of Planning and Environmental Protection. She managed and supervised plat applications, created a permit monitoring system, and monitored compliance with all aspects of development approvals. Duties included coordinating the development review agencies in the preparation and adoption of the ordinances amending the Weston Development of Regional Impact.

### PROJECT EXPERIENCE

**Growth Management Director and Provision of General Planning Services: City of West Park, City of Weston, Town of Surfside, Town of Loxahatchee Groves.** Responsible for all planning activities, including plat and site plan review as well as the creation and modification of land development regulations; establishment of zoning, landscaping, sign codes; and, preparation of a master park plan. Oversaw communication and coordination between city management, elected officials, major developers, and residents.

**Site Plan Review:** Supervised preparation and presentation of site plan reviews and reports under an ongoing cost recovery process. Plans from the cities are distributed to various plan review disciplines and the final reports are presented in a cohesive and consistent manner.

**Comprehensive Planning:** Supervised preparation of comprehensive plans, evaluation and appraisal reports, EAR-based amendments, water supply plan goals, and capital improvements element updates for various local governments.

**Zoning Codes: City Weston, City of West Park, City of Sunny Isles Beach, Town of Surfside.** Responsible for preparation, presentation and adoption of zoning codes. Direction required the coordination of workshops and consensus building among the elected officials, residents and developers in the city.

**Transit Oriented Development: Sheridan Station-side Village, Hollywood, Florida.** Coordinated all planning and engineering services for the site plan application and land use plan amendment for the Sheridan Station-side Village, a mixed-use development integrating an existing Tri-rail station and other transit services.

**Town Center Zoning Overlay Districts: City of Hollywood, City of Miami Gardens, City of Sunny Isles Beach.** Responsible for development of zoning overlay district comprising zoning criteria, architectural, and landscape requirements leading to town center master plan implementation and for special districts.

**Ongoing Private Development Coordination:** Responsible for coordinating all aspects of land development activities including platting and site planning, rezoning, and obtaining all government approvals and building permits. Specific tasks involve ensuring that engineering, survey, landscape architecture, and construction management personnel are working together to bring a project to completion.

### EDUCATION

M.P.A., Florida Atlantic University, Boca Raton, FL

B.A., Psychology and Management, McGill University, Montreal, Canada

### PROFESSIONAL REGISTRATION

American Institute of Certified Planners  
No. 116948

### PROFESSIONAL ASSOCIATIONS

American Planning Association -  
Past President of Broward Chapter

### PROFESSIONAL MEMBERSHIPS

Broward County Management Efficiency and Study Committee, Member (Appointed by County Commission); Chair of Growth Management Subcommittee, 2004-2006, & 2009-2011

Technical Advisory Group to the Broward County League of Cities, Chair, 2003-2006

Chair Staff Working Group, School Board of Broward County, 2005-Present  
Broward County Oversight Committee, 2009 - Present

Broward County League of Cities Scholarship Committee, Chair, 2010 - Present



## Sarah Sinatra Gould, AICP

*Director, Planning Department*

### SUMMARY OF QUALIFICATIONS

Ms. Sinatra has over 10 years of planning experience including municipal planning director duties such as processing zoning requests, land use plan amendments, site plan reviews, plats rezoning petitions, variances, vacation/abandonments and all other development application reviews. She holds a Master's degree in Urban and Regional Planning from FAU. Ms. Sinatra has also written evaluation and appraisal reports, comprehensive plans and zoning and land development codes. She is experienced in writing form-based codes and transit-oriented zoning codes. As the planning department director for Calvin, Giordano & Associates, she acts as the community development director for the City of Weston, the City of West Park and the Town Planner for the Towns of Surfside and Medley. For those entities, she carries out day-to-day planning and zoning activities, presents staff reports and recommendations to the commissions, the planning and zoning boards and provides customer service assistance to residents, developers and business owners.

### PROJECT EXPERIENCE

#### Comprehensive Planning

**Town of Surfside EAR.** Identified items of concern from the Town's 2006 Charrette, including transportation planning and traffic issues. The EAR also recognized challenges with density and intensity.

**Town of Surfside EAR Based Amendments.** Incorporated many issues from the Town's 2006 Charrette and provided an analysis on tourist/hotel uses.

**City of West Park Comprehensive Plan.** Prepared the City's first Comprehensive Plan.

**City of Sunny Isles Beach EAR.** The City's intense population growth resulted in the need for an evaluation of recreation and open space uses and traffic concerns.

**Sheridan Stationside Land Use Plan Amendment.** Completed an amendment to the City of Hollywood and the Broward County Land Use Plans to change the land use designation on 40 acres to Transit Oriented Development (TOD). This included residential, hotel units, commercial office at a rail station to create true transit development. There was also an affordable housing component.

**City of West Park Transit Oriented Corridor Land Use Plan Amendment.** Amended the City and County Land Use Plans to create a Transit Oriented Corridor (TOC) for the City of West Park. The designation provided 575,000 square feet of office space, 500,000 square feet of commercial area, 200 hotel rooms and 1,500 new residential units to a depressed portion of US 441/ SR7.

#### Zoning and Land Development Codes

**City of West Park Land Development and Zoning Code.** Prepared the City's first Land Development and Zoning Code. These ordinances included new sign and landscape criteria to provide an identity for the newly incorporated City.

**Town of Surfside Zoning Code.** Created a modified form-based code for the Town. Facilitated many months of workshops to gain as much input as possible from the residents. The code resulted in "McMansion" standards to avoid over building in the single family neighborhood. This code also included new landscape regulations to provide more substantial buffers between uses.

**Town of Surfside Design Guidelines.** The design of buildings and their compatibility

### EDUCATION

B.A. in Political Science, Florida Atlantic University, 1997-2001

Masters in Urban and Regional Planning, Florida Atlantic University, 2001-2003

### PROFESSIONAL CREDENTIALS

American Institute of Certified Planners No. 158802

American Planning Association

Florida Chapter of the American Planning Association

Appointed member of the Miami-Dade Shoreline Development Review Committee



## Sarah Sinatra Gould, Page 2

for the Town became issues of concern. A number of workshops were held to gain public participation in crafting design guidelines for the Town.

**City of Hollywood.** Created zoning guidelines and distance separation requirements for homeless shelters, free restaurants, half-way housing, and substance abuse clinics.

**Town of Medley.** Analyzed solid waste activities in the Town and prepared new zoning category to correct non-conformities.

**Collier County Post Disaster Temporary Housing Study.** Reviewed the County's Comprehensive Plan and Zoning Code to determine where housing could be located after a disaster as well as identifying sections of the code to be waived in post disaster conditions.

**City of West Park Enterprise Zone.** Prepared housing, population and income data as well as mapping data for inclusion into the Broward County Enterprise Zone. The State of Florida granted inclusion of the City in the Broward Enterprise Zone in 2010.

**Town of Surfside.** Prepared an overhaul of the Town's sign code. Added illumination standards and made allowance for LED screens to accommodate the business owners' requests.

### Municipal Planning Staff

**City of West Park, Planning and Zoning Director.** Oversee the day to day functions of the Planning and Zoning Department. Respond to zoning calls from property owners and interested parties. Created the development review process for the City and chair the development review group meetings. Review zoning permits and certificates of use. Complete development reviews including site plans, plats, variances, special exceptions, land use plan amendments and rezoning applications. Created the necessary applications for these development reviews and prepare all staff memorandums to the City Commission.

**City of Weston, Director of Development Services.** Process development review applications including site plans, plats, variances, special exceptions, land use plan amendments and rezoning as well as managing the Planning and Zoning Department. Prepare items for the Development Review Committee (DRC) and the City Commission by chairing the DRC meeting, preparing the staff memorandum to the City Commission and presenting the application to the City Commission.

**Town of Surfside, Town Planner.** Respond to zoning calls from the public. Created the development review process for the Town and chair the development review group meetings. Review zoning permits and prepare items for the Design Review Board Meeting. Present site plans and permits to the Design Review Board, which analyze architectural and design standards in completing the review. Complete development reviews including site plans, plats, variances, special exceptions, land use plan amendments and rezoning applications. Prepare all staff memorandums and present the items to the Planning and Zoning Board and the Town Commission.

**Town of Medley, Town Planner.** Process development review applications including site plans, plats, variances, special exceptions, land use plan amendments and rezoning as well as the managing the agenda for the Development Review Committee (DRC). Prepare and present applications to the Town Council.

**City of Pahokee, Consulting Planner.** Provide zoning assistance to the City and to the general public. Review development applications including site plans, plats, variances, conditions uses, and rezoning applications. Prepare staff memorandums and present the items to the Planning and Zoning Board and the City Commission.



## Richard D. Cannone, AICP *Planning Administrator*

### SUMMARY OF QUALIFICATIONS

Richard Cannone, a Planning Administrator at Calvin, Giordano & Associates is responsible for the preparation of comprehensive land use plan amendments for public and private clients, as well as assisting the Planning Department with required analyses for EAR-based Amendments and Comprehensive Plans. In addition to comprehensive planning, Mr. Cannone will assist the Department in representing various municipal clients of CGA by reviewing applications, preparing staff reports and attending meetings for current planning activities, including but not limited to development applications such as rezoning, site plan and plat review, special exception, conditional use and amendments to the comprehensive plan. When required, Mr. Cannone will be responsible for project management, scheduling and budgeting for private and public sector clients.

### PROJECT EXPERIENCE

**Assistant Project Manager the Related Group, 2013-2014.** Facilitate and assist the Vice President in all phases of entitlements, development and construction, including permitting, customer service, sales/marketing, management, association turnover and other problems or issues related to the timely finalization of the project. Negotiate a variety of contract with vendors, as well as agreements, easements and other instruments with local and state governments.

**Planning Administrator Broward County, 2013.** Supervisory and administrative work managing comprehensive planning, land use, special projects, zoning, code enforcement and redevelopment in Broward County.

**Planning Administrator Calvin, Giordano & Associates, 2011-2013.** Responsible for project management, scheduling and budgeting for private and public sector clients, the preparation of comprehensive land use plan amendments and land development regulations for public and private clients, as well as assisting the Planning Department with required analyses for Comprehensive Plan Amendments, Comprehensive Plans, Annexation Studies, Neighborhood Plans, Design Guidelines and Zoning/Land Development regulations. Currently implementing a variety of land development code amendments based upon strategies identified in the Comprehensive Plan for municipal clients.

- **Town of Medley Consulting Planner.** Responsible for all planning activities including plat and site plan review as well as the creation and modification of land development regulations; updating the Town's zoning codes; and preparation of a solid waste overlay project. Oversees communication and coordination between Town management, elected officials, major developers, and residents. Creation of Certificate of Use Ordinance and BTR Ordinance.
- **City of Pahokee, Florida.** Preparation of site plan reviews and reports for the City of Pahokee under ongoing cost recovery process. Plans from the City are distributed to various plan review disciplines and the final reports are presented in a cohesive and consistent manner.
- **Preparation of Annexation Studies for the City**
- **City of Hallandale Beach, Florida. RAC and Fashion Row Arts Districts.** Update of City Land Development/Zoning Codes and Overlay Districts consistent with the City-wide Master Plan and Regional Activity Center.
- **Ongoing Private Development Coordination:** Responsible for coordinating all aspects of land development activities including platting and site planning, rezoning, and obtaining all government approvals and building permits.

### EDUCATION

MS Public Management,  
St. Thomas University,  
Miami, Florida

BS Community and  
Regional Planning,  
Iowa State University,  
Ames, Iowa

### PROFESSIONAL REGISTRATION

American Institute of  
Certified Planners

### TRAINING

Affordable Housing Finance

Real Estate Development  
Finance

Home Inspection

Community/Neighborhood  
Organizing

Effective Lobbying

Asset and Property  
Management

Conflict Resolution

Communicating with  
difficult people

Economic Development  
Marketing

Economic Development  
Finance

NIMS IS 700, IS 800, ICS  
100, ICS 200 and  
Emergency Management  
Coordination



## Richard Cannone, AICP, Page 2

- **City of Hallandale Beach, Hallandale Beach, Florida.** Director, Development Services, Housing, Economic Development and CRA Departments. Performed highly complex and responsible managerial and administrative work directing physical and economic development/redevelopment, community redevelopment, planning and zoning programs, and code enforcement/compliance to ensure growth of City and efficient use of City's resources in adherence with long and short-term goals, ordinances, policies and procedures pertaining to development services. Directed and supervised the operation and oversaw the daily activities of the Economic Development, Planning and Zoning, Code Compliance, Building, Community Redevelopment Agency and Engineering divisions within the Department of Development Services that included a staff of 35 full time employees and a budget of approximately \$15 million. Acted as primary liaison with the public and City officials in the receipt, processing, review and recommendation of all land development applications. Responded to public inquiries regarding City development and planning. Consulted with investors and developers who are reviewing the City, prepared and gave presentations to various interested civic and professional groups as it relates to redevelopment of the City.

**City Manager/Finance Director City of Clairton, 2010-2011.** Chief Executive Officer of a Pennsylvania Third Class City located in the Pittsburgh, Pennsylvania metropolitan area with a total budget of approximately \$3.5 million and 40 employees. Responsible to a five member City Council for the day-to-day operations of the municipality including, but not limited to, finance and budgeting, economic development, building, planning, code enforcement, community development, public works, library, contract management for utilities and other contracts, public safety (police, volunteer fire and EMS), risk management, recreation (including management of regional swimming pool) administration, labor negotiations and personnel matters.

**City Manager City of Weslaco, 2009-2010.** Chief Executive Officer of a municipality along the United States/Mexico Border. Annual General Fund Budget of approximately \$29 million with 350 employees. Responsible to a five member City Council for the day-to-day operations of the municipality including, but not limited to, finance and budgeting, economic development, building, planning, code enforcement, community development, public works, library, contract management for utilities and other contracts, public safety (police, fire, EMS), risk management, recreation, regional airport, homeland security, administration, labor negotiations and personnel matters.

**Development Services/CRA/Economic Development Director City of Hallandale Beach, 2007-2009 & 2010.** Duties & Responsibilities: Directed and supervised the operation and oversaw the daily activities of the Economic Development, Housing, Planning and Zoning, Code Compliance, Building, Community Redevelopment Agency and Engineering divisions within the Department of Development Services that includes a staff of 35 full time employees, 10 contract employees and a budget of approximately \$15 million as well as assist in the implementation of the City's Capital Improvement Program.

**Senior Land Planner Greenberg Traurig, 2005-2007.** Duties & Responsibilities: Senior Land Planner with International Law firm. Work closely with land use and environmental attorneys in developing and implementing innovative growth management and project strategies to assist clients with problem solving and achieving compliance with planning and regulatory requirements

**Principal Planner City of Coral Gables, 2003-2005.** Duties & Responsibilities: Perform professional planning and supervisory duties. Administer the review of all Planning Department applications to include comprehensive land use plan amendments, re-zoning, developments of regional impact, notice of proposed change applications, annexations, site plans, plats, abandonment's, and conditional uses. Advise developers and property owners of policies and regulations.



## Nakeischea Loi Smith, AICP

*Senior Planner*

### SUMMARY OF QUALIFICATIONS

Ms. Smith has seven years of municipal planning experience ranging from processing building permits and reviewing zoning applications to authoring land development and zoning ordinances, codes and regulations for both local and international governments. She holds a Master's degree in City Planning from the Massachusetts Institute of Technology where she specialized in Housing, Community and Economic Development. As the Senior Planner at Calvin, Giordano & Associates, Ms. Smith carries out general planning and zoning functions for the City of Miami Gardens, City of Pahokee, City of West Park, Town of Cutler Bay, Town of Medley and Town of Surfside in addition to developing special studies and preparing reports. She also works closely with Community Redevelopment Agencies throughout Florida as part of CGA's Redevelopment and Urban Design Division, which focuses on community improvement and revitalization.

### PROJECT EXPERIENCE

**City of Pahokee, Florida.** Processed rezoning petitions and presented staff reports and recommendations to the commission and planning and zoning boards.

**Town of Cutler Bay, Florida.** Conducted an analysis of ordinances related to cost recovery and notice/advertisement procedures. Prepared recommendations and drafted proposed language to be included in the revised land development regulations.

**Town of Medley, Florida.** Reviewed site plans for commercial development and prepared staff reports for variance and rezoning applications.

**Town of Surfside, Florida.** Analyzed the existing sign code and identified issues and inconsistencies. Prepared a rewrite of the sign code to include updated standards, elimination of contradictory language, clarification of terms and definitions, and incorporation of modern sign typologies.

**Martin County, Florida.** Assisted in the development of the County's first form-based code within the seven Community Redevelopment Areas.

**Miami-Dade County, Florida.** Prepared a Finding of Necessity Study for the establishment of a Metrozoo-Richmond Heights Community Redevelopment Area.

**Nassau, Bahamas.** Established the country's first Business Improvement District within downtown Nassau.

### YEARS OF EXPERIENCE

7

### EDUCATION

MA, City Planning,  
Massachusetts Institute of  
Technology, 2007

BA, Sociology,  
Northeastern Illinois  
University, 2004

AA, French, Northeastern  
Illinois University, 2004

AA, Spanish, Houghton  
College, 1998

### PROFESSIONAL AFFILIATIONS

American Institute of  
Certified Planners  
No. 165215

Business Member of the  
City of Hollywood Green  
Team Advisory Committee



## Chris Giordano, MSC

*Director of Management Services*

### SUMMARY OF QUALIFICATIONS

Chris Giordano has ten years of construction management experience. After graduating from the University of Central Florida with a Bachelor of Science in Electrical Engineering Technology, he pursued a career in the construction management industry. Chris held the positions of Project Administrator, Project Manager, Contracts Manager, and finally Project Controls Manager for the Orion Marine Group before deciding being appointed Project Administrator at Calvin, Giordano & Associates, Inc.

Chris has managed hundreds of millions of dollars in construction. The clients for these projects ranged from federal, state, local and private clients. Chris gained construction experience throughout the southeastern United States as well as in the Caribbean.

### PROJECT EXPERIENCE

#### **Director of Management Services – Governmental Services. Calvin, Giordano, & Associates, Inc., Fort Lauderdale, FL.**

- Coordinates and Assist in the Management of all Government Contracts
- Manages the Production of Bid Documents, Responses to RFIs, and Bidding Process
- Recommend Award of Contracts to City Commission
- Manage the Contractor's Submittals, Payment Applications, Claims, Change Orders
- Ensure Contractors are Maintaining Current Schedule and Budget Goals.
- Manage and Direct all Required Subconsultants and Inspectors as Needed

#### **Capital Improvement Projects Managed:**

- Town of Surfside Utility Rehabilitation Project
- Town of Surfside Community and Aquatic Center Construction
- Town of Surfside Comprehensive Traffic Study and Analysis
- Town of Surfside Seawall Inspection, Design and Reconstruction
- Sunny Isles Beach Newport Fishing Pier Project Administration and Permitting
- Sunny Isles Beach North Bay Road Bridge Project Administration and Permitting
- Port Sutton Manatee Observation
- Jupiter Maintenance Dredging Manatee Observation
- Tampa MATOC Dredging Manatee Observation

### PROJECT CONTROLS MANAGER & CHIEF ESTIMATOR

#### **Orion Dredging Services, LLC, Jacksonville, FL. (2008 – 2009)**

- Create and Present all PSR & PCSR Reports for Division, Primavera Progress Schedules, Cost and Revenue Forecasts, and Direct Cost and Schedule Support to Project Managers.
- Perform all Bid Estimates for Federal, State, Local, Private and International Projects.
- Forecast Every Project on a Monthly Basis and Present Findings in Monthly PCSR Meetings.
- Managed Multiple Public Works Contracts Concurrent with PCM & Estimating Duties.

#### **Marine Construction Projects Managed:**

- Pier Construction and Cruise Ship Berth Dredging-Waterside Improvements, Labadee, Haiti.
- USACE Blount Island Emergency Dredging for Navy Ship Traffic and Mooring – Jacksonville, FL

### EDUCATION

BSEET, Electrical Engineering Technology, Concentration on Computer Systems. University of Central Florida, 2005

### PROFESSIONAL REGISTRATION

Florida Marine Specialty Contractor (Active License) No. SCC131151012

OSHA 10-Hour Safety Certified



## Chris Giordano, Page 2

- TPA FY 08 Maintenance Dredging for Commercial Ship Traffic and Mooring – Tampa, FL
- Port Everglades Maintenance Dredging for Commercial Ship Traffic and Mooring – Fort Lauderdale, FL

### **Contract Manager; Subaqueous Services, Inc., Orlando, FL. (2004 – 2008)**

- Managed Office Staff of 10 Employees.
- Maintained all Correspondence with Owners/Engineers.
- Managed \$44 million In Annual Contract Backlog.
- Created and Attended all Presentations for Governments, Citizens, Conferences and Private Firms.
- Created Project Tracking Databases.

### **Marine Construction Projects Managed:**

- Volusia County Emergency Beach Nourishment – Dune Restoration.
- Miami Dade County BEAR 1 (Beach Erosion and Re-nourishment)
- Tampa Port Authority Hookers Point Expansion.
- Jaxport Dames Point Expansion – Project One.
- SFWMD Lake Trafford Restoration – Phase II.
- FIND MSA 434/434C DMMA Construction.
- Island Pointe Marina Dredging.
- Bayou Grande Villas Maintenance Dredging.
- Port Everglades Maintenance Dredging.
- Panama City Marina and Homeowner Canal Dredging.
- Peace River Hurricane Debris Cleanup.
- FP&L Hurricane Debris Cleanup.
- Hendry County Oxbow Dredging.
- SFWMD S-65A Rock Rip Rap Bank Restoration.

### **Engineering Inspector Intern, GLC Construction, Hallandale, FL. (1999 – 2001)**

- Air Tested Concrete.
- Slump Tested Concrete.
- Inspected Pollution Retard Baffles.
- Inspected Mud Work on Drainage Structures.



## Norman Bruhn

*Director of Building Code Services*

### SUMMARY OF QUALIFICATIONS

Norman Bruhn has over 25 years of construction management experience. After graduating from Santa Fe College with an Associates of Arts in Criminal Justice, he pursued a career in the construction industry. Norman has held the positions of Assistant Superintendent, Project Supervisor, Chief Structural Inspector and Plans Examiner, and finally the Building Official for numerous cities and organizations such as Norcot Inc., City of Coal Springs, Town of Davie, City of Cooper City, Capri Engineering, Miami Shores Village, and City of Pembroke Pines.

At Calvin, Giordano & Associates, Inc., Norman has been appointed the Director of Building Code Services where he oversees all of our Building Code employees throughout all of Broward County in municipalities such as Fort Lauderdale, Pembroke Pines, West Park, Pompano Beach, Weston, Lighthouse Point, and Deerfield Beach.

### PROJECT EXPERIENCE

#### 09/2008 - Present: Miami Shores Village, Florida

##### **Building Official, Building Chief Inspector, and Building Plans Examiner**

- Job duties include municipal inspections, plan review, and all building official duties.
- Responsible for all means and method of building department operations.

#### 08/2007-09-2008: Calvin, Giordano & Associates, Inc., Fort Lauderdale, Florida

- Building Official/Building Director and Chief Structural Inspector (Town of Surfside)(A.B. City of West Park)

#### 04/2006-04/2007: Capri Engineering, Sunrise, Florida

- Senior Inspector/Plans Examiner. Job duties included municipal inspection and plan review for several Broward cities, plan review for private provider services and threshold inspections.

#### 07/2002-03-2006 & 04/2007-08/2007: City of Cooper City, Florida

- Assistant Building Official/Chief Structural Inspector. Job duties include supervision of inspectors and plan reviewers. Performance of administrative tasks including the issuing of Certificate of Occupancy as required by the F. B.C.

#### 12/2000-07/2002: Town of Davie, Florida

- Building Inspector for structural aspects of new construction, alterations and additions of all types of construction. Job duties include performing all inspections required by the S.F.B.C. including F.A.C.

#### 10/1998-12/2000: City of Coral Springs, Florida

- Building Inspector for structural aspects of new construction, alterations and additions of all types of construction. Job duties include performing all inspections required by the S.F.B.C. including F.A.C.

#### 10/1993-08-1997: Norcot, Inc., Port St. Lucie, Florida

- Project supervisor in charge of entire jobs from sales, bidding scheduling, and completion. Type of work was small residential remodels (kitchens, baths, room additions). 50% owner

### EDUCATION

Associates Degree  
Santa Fe Community  
College

### LICENSES & CERTIFICATIONS

Florida State Certified  
General Contractor  
CG-C057387

Florida State Certified  
Roofing Contractor  
CCC-1329044

Florida State Certified  
Structural Inspector  
BN-3525

Florida State Certified Plans  
Examiner, PX-1809

Florida State Building Code  
Administrator  
BU-1346



## Norman Bruhn, Page 2

### **01-1993-10-1993: B & D Structures, Inc., North Miami Beach, Florida**

- Structural supervisor for concrete forming crew with 5 to 15 men in my direct supervision. Job duties included all layout, material ordering, scheduling concrete/pumps, and forming.

### **02/1989-02-1991: Rogers & Ford Construction, Boynton Beach, Florida**

- Assistant supervisor with 2 to 20 men in my direct supervision. Job duties included layout and supervising production. Projects included Club and facilities at Weston, Publix food store & plaza at Weston, and solid waste transfer station.

### **01/1985-02/1989: North South Construction / Ocean Properties Limited, Boynton Beach, Florida**

- Assistant superintendent traveling to 5 states building Marriott Hotels.



## Peter A. Beaudoin

*Assistant Building Official*

### SUMMARY OF QUALIFICATIONS

Peter Beaudoin has over 40 years of construction experience. Peter has held management positions of Mechanical Superintendent, Chief Inspector and Plan Reviewer for both Plumbing and Mechanical, and Building Official for several municipalities such as the City of Cooper City, Coral Springs, West Park, Pembroke Pines, Deerfield Beach, and Lighthouse Point. Being licensed and certified in mechanical and plumbing along with his many years of experience, makes Peter a versatile asset to Calvin, Giordano & Associates, Inc.

### PROJECT EXPERIENCE

#### 2007-Present: Chief Mechanical Inspector/ Plumbing plans Examiner

- Review construction Plans in the Mechanical and Plumbing disciplines for conformity to the Florida Building Code as well as local agencies requirements. Assist the contractors, engineers and architects as well as owner builders with corrections and interpretations
- Performed field inspections in both disciplines when code violations were observed correction notices were issued and follow up inspections were performed for compliance
- Supervised one field inspector and part time will call inspectors when needed and in the absence of the Building official I assumed the full responsibilities including issuing certificates of occupancies

#### 1993-2007: Building Official Chief Mechanical / Chief Plumbing Inspector, City of Cooper City, FL

- In September 1993 this was an entry level inspector's position. I performed field inspections for compliance to the South Florida Building code under the supervision of the Building Official and Chief Mechanical Inspector Doval Sallustio. I qualified for and received my Plumbers certification through the Broward County Board of Rules and Appeals and performed field inspections for compliance to the South Florida Building Code as well as the health department and utilities and local agencies again under the direction of Mr. Sallustio
- I qualified and received the Standard plans examiners license from the Department of Business and Professional Regulation for the Mechanical and Plumbing disciplines.
- I reviewed construction plans for the conformity to the South Florida Building as well as the new Florida Building Codes
- September 1998 I was promoted to Chief Mechanical and Plumbing Inspector
- November 2005 I was promoted and assumed the duties of the Building official
- My duties included over seeing a department with 8 employees administrating the department budget employee evaluations, attending commission meetings and issuing Certificates of occupancies and also performed Mechanical/Plumbing plans review and Inspections

#### 1980-1993: Mechanical Superintendent, Ivey Mechanical Contractors, Nashville, Tennessee

- Over saw the installation of sheet metal duct work, chillers, air-handlers, steam and chill water piping systems in various hospitals in Broward County Including Coral Springs Medical Center , Hollywood Memorial, University Hospital in Tamarac Florida and Northwest Regional Medical Center in Margate Florida

### LICENSES

Plumbing State of Florida  
Contractors CFC039969  
(inactive)

Broward County Board  
of Rules and Appeals  
Mechanical Plans Examiner  
/ Inspector

Broward County Board  
of Rules and Appeals  
Plumbing Plans Examiner/  
Inspector

Department of Business  
and Professional  
Regulation Building Code  
Administrator BU1065

Department of Business  
and Professional  
Regulation Standard Plans  
Examiner PX980

Department of Business  
and professional  
Regulation) Standard  
Inspector (BN273



## Peter A. Beaudoin, Page 2

### 1972-1979: Gordon F. Merrick Oil Company, Plaistow, New Hampshire

- Assist in the installation of boilers and forced hot air furnaces, threaded steel pipe for oil storage tanks.



## Mario Sotolongo

### Senior Code Enforcement Supervisor

#### SUMMARY OF QUALIFICATIONS

Mario Sotolongo has over twenty (20) years of professional experience in the construction industry. Mr. Sotolongo is the Senior Code Enforcement Supervisor in the City of Pompano Beach, a division of the Governmental Services Department with Calvin, Giordano & Associates, Inc. (CGA). Since Mr. Sotolongo has been with CGA, he has become FACE Level IV certified and obtained a Yellow Belt in Lean Six Sigma.

#### PROFESSIONAL EXPERIENCE

**2012 to Present: Calvin, Giordano & Associates, Inc., Government Services Code Compliance Supervisor, City of Pompano Beach Code Inspector, Zone 5 (Highlands)**

**200-2012: City of Fort Lauderdale, Department of Sustainable Development Code Enforcement Officer. (Levels I, II and III)**

- Trained and qualified in Noise Regulations, City wide
- Enforcement of Artificial lighting restrictions during Sea Turtle nesting season
- Artificial lighting restrictions, City wide
- Uniform Land Development Regulations
- Special Entertainment Districts (noise and special regulations)
- Special Reaction Team (Specialized Enforcement Actions City wide)

**2003-2006: Nelco Companies / AAA Glass & Mirror Glass and Glazing Contractor**

- Inside Sales
- Outside Sales
- Building Permit Applications
- Office Manager

**1992-1999: National Glass and Construction Company, Miami, FL Building Contractor, specializing in Commercial Glass and Glazing**

- Vice President (1997 to 1999)
- Project Manager
- Designer (CAD Level I)
- Estimator (1992 to 1997)
- Sales and Estimating
- Drafting
- Building Permit Applications

**1990-1992: Lloyd's Register of Shipping, La Habana, Cuba, British Ships Classification Society**

**Inspection and Insurance Adjuster**

- Assistant to Senior Inspector (1991 to 1992)
- Report Review and Translation
- Automotive Mechanic and Driver (1990 to 1991)
- Report Review and Translation

**1989-1990: MAINCON B.V., Dutch Ships Handlers Corporation Supply of spare parts to ocean going vessels**

- Local Sales and Technical Representative
- General Office Management
- Sales and Technical assistance to vessel owners

#### EDUCATION

School of Engineering, Universidad de la Habana, CUJAE, Cuba. Associate in Mechanical

School of Engineering, Universidad de la Habana, ISCAH, Cuba. Associate in Mechanical Engineering

#### CERTIFICATIONS / PROFESSIONAL REGISTRATIONS

Green Building and Sustainable Development Course

Quest Technologies Environmental Noise Reduction

FL Institute of Government - FACE Level IV

FL Institute of Government - FACE Level III

FL Institute of Government - FACE Level II

FL Institute of Government - FACE Level I

BCC Institute of Public Safety - Parking Enforcement Specialist

Dade County - Trade Bldgt Specialty Metal Awnings and Shutter

MDCC Real Estate FREC Course I



**Sandra Lee, AICP CEP, LEED AP BC+D, CFM**  
*Director, Environmental*

**SUMMARY OF QUALIFICATIONS**

Ms. Lee has 20 years of professional experience and directs CGA’s Environmental Department coordinating our regulatory permitting, environmental planning, site assessment, resource management and environmental technical support services. Before joining CGA, Ms. Lee was a Biologist with the Growth Management Division of Monroe County. During the three years that CGA provided planning and zoning services for the newly incorporated City of Marathon, she lived full-time in the Florida Keys and was responsible initially for all the environmental planning for the City of Marathon and subsequently for a full range of planning services for the City. Prior to relocating to Fort Lauderdale, Ms. Lee was a resident of the Florida Keys for 10 years where she became very familiar with the environmental sensitivities regarding the flora, fauna, land and special government programs governing and protecting the 160-mile string of coral islands making up the Keys, a designated area of critical State concern. In general, Ms. Lee:

- Provides technical support, environmental resource management, environmental planning and sustainable development services to public and private entities
- Provides permitting services to obtain environmental resources permits at the local, state and federal level
- Coordinates interagency and multi-disciplinary team efforts
- Provides most feasible development and mitigation options, and the probable costs for mitigation options
- Prepares Coastal and Conservation Elements for Comprehensive plans, coordinates on Comprehensive Plan Evaluation and Appraisal Reports (EAR) and EAR based amendments
- Designs wetland mitigation plans, provides bidding and construction oversight services for the construction and installation of mitigation and natural areas
- Manages the compliance monitoring on over 2,000 acres of constructed wetlands and administers the maintenance contract on over 2,000 acres of created and enhanced wetlands
- Conducts and manages field staff conducting wetland, wildlife and habitat assessments, imperiled species surveys, mitigation compliance monitoring reporting, and tree surveys

**ENVIRONMENTAL RESOURCE PERMITTING EXPERIENCE**

**Archdiocese of Miami Blessed John XXIII Religious Facility, Miramar, Florida.** Responsible for environmental permitting, which included the site assessments, wetland assessments and obtaining a U.S. COE, a Broward County and two South Florida Water Management District permits; one for the development site and one for a newly constructed off-site mitigation area. Nearly the entirety of the development site was wetland and was comprised of multiple habitat types and qualities. The Archdiocese had previously obtained environmental resource permits for this project and purchased mitigation previously constructed under a prior project. However, the Archdiocese had let all permits expire and needed to again go through the entire permitting process, under new regulatory criteria. Permitting required extensive negotiation to allow previously purchased mitigation credit from a private development site to continue to apply to this project. Additional off-site mitigation was also required. Also designed the newly constructed off-site mitigation area, conducted the mitigation construction oversight and long term compliance monitoring, and the conducted maintenance oversight for the off-site mitigation area.

**YEARS OF EXPERIENCE**  
20

**EDUCATION**  
M.A. Biology/Ecology,  
Magna Cum Laude  
St. Cloud State University,  
Minnesota

B.A. Biology/Botany,  
Magna Cum Laude  
St. Cloud State University,  
Minnesota

**PROFESSIONAL REGISTRATION**  
American Institute of  
Certified Planners  
No. 018627

Green Building  
Certification Institute  
LEED A.P. BD+C  
NO. 10215598

Association of State  
Floodplain Managers CFM  
No. US-07579

Florida DEP Qualified  
Stormwater Management  
Inspector  
No. 5889



## Sandra Lee, AICP CEP, LEED AP BD+C, CFM, Page 2

**Pembroke Lakes Square/Miramar Pinelands Natural Area, Miramar, Florida.** Responsible for coordinating and finalizing the permitting through the U.S. COE, Broward County and the SFWMD with mitigation plan components from multiple firms for the construction of a commercial complex in Pembroke Pines on a 26+ acre site that was entirely wetlands. Mitigation was constructed in Miramar on the County-owned Miramar Pinelands Natural Area that was purchased with State funding. The project required a tri-party agreement with County Commission approval for mitigation construction on County park land. The project also required obtaining a permit modification for additional adjacent wetlands purchased and added to the development site; coordinated the purchase of mitigation bank credits for the additional land.

**Dania Basin 5 Drainage Improvements, Dania Beach, Florida.** Designed and permitted a unique bio-swale stormwater improvement system to benefit both the developed and adjacent natural habitats. Conducted all site and wetland functional assessments for permitting and processed permits through the U.S. COE, the South Florida Water Management District and Broward County; permitting required extensive negotiation with various Divisions of Broward County for use of County land that is designated wilderness area, mangrove habitat, and serves as a buffer to West Lake Park. The project required the development of an Agreement with the County and the City requiring approval by the County Commission. The construction of the bio-swale did require unavoidable impacts to wetlands; however, the swale design included enhancements that created greater wetland functional gain than the functional loss through the impacts. The project restored historic sheet flow of freshwater to the West Lake Park habitat.

**Foxcroft Multi-Family Residential Development, Miramar, Florida.** Responsible for site assessments and obtaining a U.S. COE, Broward County, and a South Florida Water Management District permit for the redevelopment of a golf course into a residential development. Mitigation bank credits were purchased for the U.S. COE permit and on-site mitigation was conducted for Broward County. Additionally, over 20 acres of non-mitigation created wetland habitat was designed and included in the final plan.

**Public Lands, Weston, Florida.** Responsible for obtaining a water use permit from the South Florida Water Management District for nearly 1,000 acres of irrigated public land.

**City Center Parking, Pembroke Pines, Florida.** Responsible for environmental permitting, which included the site assessments, wetland assessments and obtaining a U.S. COE, a Broward County and a South Florida Water Management District permit for the development site and for a newly constructed off-site mitigation area. Nearly the entirety of the development site was wetland and was comprised of multiple habitat types and qualities; also developed the mitigation plan for the conversion of an off-site golf course to wetland habitats. The development fell within an FPL power line easement requiring additional coordination and approvals with FPL. The U.S. COE permit required the coordination of purchasing mitigation bank credits. Economic developments in 2014 lead to the City selling the off-site golf course. Currently working with the City to release the recorded conservation easement and modify the issued permits to allow the City build the parking facility with mitigation bank credits instead of designed off-site mitigation.

**Dania Cove Park, Dania Beach, Florida.** Obtained local, state and federal permits to install site improvements required by a Florida Communities Trust and a Parks for People grant including dock, shoreline platform, and shoreline protection measures on a City park located along the Dania cut-off canal. Designed a stabilization system for a badly eroded and unstable shoreline embankment and developed a shoreline vegetation plan.

**Ortanique Residential Subdivision, Pompano Beach, Florida.** On behalf of the City CRA obtained an ongoing Florida Fish and Wildlife Conservation Commission permit to relocate burrowing owls and collapse burrows to allow on-going site grading work to be conducted within the subdivision.

**Drainage Improvements, Lake Park, Florida.** Conducted a submerged aquatic vegetation survey and obtained a U.S. COE and SFWMD permit for installation of a new outfall and upgrades to existing outfalls into the Lake Worth Lagoon for a Town drainage improvement project.

**FPL Substation, Dania Beach, Florida.** Conducted the site assessments and wildlife survey and obtained a U.S. COE and a Florida Department of Environmental Protection permit for the expansion of an electric substation in mangrove habitat recognized as Outstanding Florida Waters, and coordinated the purchase of mitigation bank credits for the wetland impacts.



## Sandra Lee, AICP CEP, LEED AP BD+C, CFM, Page 3

**Pembroke Harbor/Pembroke Cay, Pembroke Pines, Florida.** Responsible for coordinating the final issuance of permits, with multiple firms, for a 170 acre residential and commercial development project that required 34 acres of on-site mitigation and the purchase of 55 mitigation bank credits. Completed the final wetland mitigation plan and planting chart. Conducted the site assessment and obtained a permit modification for a roadway extension which included additional wetland impacts and the purchase of additional mitigation bank credits.

**A1A Improvements and Bike Lanes, Jupiter, Florida.** Obtained environmental permits, conducted the site assessments, including shoreline and submerged aquatic vegetation surveys, for new outfalls into the Lake Worth Creek Aquatic Preserve which is recognized as Outstanding Florida Waters. Conducted the investigations to complete and submit the environmental LAP documentation.

**Drainage Improvements, Weston, Florida.** Obtained a US COE and a Broward County permit, and modified two South Florida Water Management District master surface water permits for drainage improvements including culvert replacements.

**Increment III Mitigation Areas, Weston, Florida.** Re-permitted Increment III of the Weston DRI through Broward County for document consistency with the final mitigation conditions, and amended the Increment II Conservation Easement dedicated to the Florida Department of Environmental Protection.

### WETLAND MITIGATION COMPLIANCE MONITORING EXPERIENCE

**Increment III, Weston, Florida.** Conducted the quarterly, five year compliance monitoring and reporting program on 1,535 acres of sawgrass marsh, tree island, constructed refugia, and lake-shelf habitat, documented utilization by a wide variety of wildlife including the federally listed Snail Kite.

**Pembroke Falls, Pembroke Pines, Florida.** Conducted the quarterly, five year compliance monitoring and reporting program on 204 acres of forested wetland, marsh, hammock, and open water, documented utilization by a wide variety of wildlife including the federally listed Wood Stork.

**Memorial Hospital, Miramar, Florida.** Conducted the quarterly, five year compliance monitoring and reporting program on 51 acres containing slough, marsh, wet prairie, and tree island habitat; documented utilization by a wide variety of wildlife including flamingos.

**Isles at Weston, Weston, Florida.** Conducted the quarterly, five year compliance monitoring and reporting program on 65 acres of marsh containing shallow channels and hydric islands which also contains an archaeological site.

**Berman Preserve, Davie, Florida** Conducted the quarterly, five year compliance monitoring and reporting program on 28 acres of marsh, tree islands, slough, forested uplands, and forested wetlands.

**Blessed John XXIII Religious Facility, Miramar, Florida.** Conducted the quarterly, five year compliance monitoring and reporting program on seven acres of slough, marsh, and wet prairie habitat located among other mitigation sites.

**Pembroke Harbor, Pembroke Pines, Florida.** Conducted the quarterly, five year compliance monitoring and reporting program on 34 acres of wetland containing emergent marsh, tree islands, and open water with a hydric berm separating the mitigation from an adjacent drainage canal. Obtained a contract to continue oversight after the regulated compliance monitoring period.

**Miramar Pinelands, Broward County, Florida.** Conducted the quarterly, five year compliance monitoring and reporting program on 32 acres of wetland creation located on Broward County Park land at the historic head of the Snake Creek slough, contains open water and wet prairie habitat.

### ROADWAY PROJECT EXPERIENCE

**Pines Boulevard widening, Pembroke Pines, Florida.** Completed the Contamination Screening Evaluation Report and the State Environmental Impact Report.

**A1A Improvements and Bike Lanes, Jupiter, Florida.** Completed the site assessments including shoreline and submerged aquatic vegetation surveys for new outfalls into the Lake Worth Creek Aquatic Preserve, which is recognized as Outstanding Florida Waters. Conducted the investigations to complete and submit the environmental LAP documentation.



## Sandra Lee, AICP CEP, LEED AP BD+C, CFM, Page 4

**Holmberg Road Sidewalk Installation, Parkland, Florida.** Conducted the site assessments for the installation a 6' wide concrete sidewalk along the north side of Holmberg Road from NW 71st Terrace east to SR 7, conducted the investigations to complete and the submit the environmental LAP documentation.

**Bonaventure Boulevard Roundabouts at Saddle Club Road and at Lakeview Drive, Weston, Florida.** Conducted the site assessments and conducted the investigations to complete and submit the environmental LAP documentation.

**Bus Stop Improvements and Greenway, West Park, Florida.** Conducted the site assessments for improvements to bus stop locations along Pembroke Road and Hallandale Beach Boulevard and for a pedestrian 'Greenway' consisting of a seven-foot-wide meandering sidewalk with pathway lighting, benches, trash receptacles, sod and small groupings of palms and accent trees to be constructed along the east side of Barak Obama Boulevard. Conducted the investigations to complete and submit the environmental LAP documentation.

### MUNICIPAL EXPERIENCE

**Environmental Management, Weston, Florida:** Responsible for the environmental resource management and environmental planning services to the City and the administration of the maintenance contracts on over 2,000 acres of created and enhanced wetlands.

**Land Clearing Review, Loxahatchee Groves, Florida.** On behalf of the Town reviewed and issued the land clearing permit for a 15+ acre religious facility on Pineland habitat, developed the tree mitigation plan, developed the performance guarantee estimate, conducted the site inspections to ensure compliance to the issued permit, and final permit close-out.

**Environmental Planning, Marathon, Florida** During the three years that CGA provided planning and zoning services for the newly incorporated City of Marathon, Ms. Lee lived full-time in the Florida Keys and was responsible initially for all the environmental planning for the City of Marathon and subsequently for a full range of planning services for the City. Ms. Lee worked closely with the City Administration, Code Compliance and Building Department to provide seamless, efficient services to the community. She reviewed and processed all applications for commercial and residential development, implemented the local 'Rate of Growth' residential allocation system, reviewed and processed specialized planning functions such as variances, conditional uses, FLUM, zoning and text amendments; and prepared all necessary staff reports and public notices gaining in depth experience in implementing:

- Heightened habitat, wetland and shoreline protection measures;
- Transfer of development rights to protect sensitive habitat;
- Coastal protection measures;
- Habitat Open Space overlays to protect sensitive habitat; and
- Rate of Growth measures

**Code Review, Palm Beach, Florida.** Requested by the Town to review the Town's Ocean Vista zoning requirements and the State laws relative to the regulations for trimming vegetation on beach dunes to identify inconsistencies and to make recommendations to the Town to achieve consistency with the State regulations.

**Community Rating System Certification, Weston and Pembroke Pines, Florida.** Compiled and submitted the annual certification documents to FEMA for the CRS participation in the NFIP. Obtained an upgraded CRS score for the City of Weston.

**NPDES Annual Reporting, Town of Surfside, the City of Sunny Isles Beach and City of Pembroke Pines, Florida.** Compiled and submitted the annual MS4 reporting documents for the Town of Surfside, the City of Sunny Isles Beach and Pembroke Pines.



## Sandra Lee, AICP CEP, LEED AP BD+C, CFM, Page 5

### GRANT ADMINISTRATION

**Dania Cove Park, Dania Beach.** Coordinated with the County and State on gaining approval for the project site design, tracked all expenditures and processed and obtained all grant disbursements for the City from the Florida for Communities Trust and the Parks for People Grants for the site development, and closed out the grants.

**Bonaventure Pump Stations, Weston.** Tracked all expenditures and processed and obtained all grant disbursements funds for the City from a Florida Division of Emergency Management Hazard Mitigation grant, a South Florida Water Management District grant, and a Florida Department of Environmental Protection grant.

**Stormwater Improvements, West Park.** Tracked all expenditures and processed and obtained all grant disbursements funds for the City from South Florida Water Management District and a Florida Department of Environmental Protection grant.

**Sanitary Sewer Improvements, Surfside.** Tracked all expenditures and processed and obtained all grant disbursements funds for the City from a Florida Department of Environmental Protection grant.

**Drainage Improvements, Surfside.** Tracking all expenditures to process disbursement requests for two Florida Department of Environmental Protection Department grants.

### PROFESSIONAL ORGANIZATION ACTIVITIES

Ms. Lee currently serves as the President of Board of Directors of the South Florida Chapter of the U.S. Green Building Council and actively participates in the Chapter activities and educational programs. Throughout 2009 she served on the Greenhouse Gas Reduction Subcommittee of the Broward County Climate Change Task Force and participated in the Built Environment working group. Ms. Lee is also actively involved with and currently serves as a Board officer for the South Florida Association of Environmental Professionals.



## Eric Czerniejewski, P.E., ENV SP *Director of Traffic Engineering*

### SUMMARY OF QUALIFICATIONS

Eric Czerniejewski, P.E., is the Director of Traffic Engineering for CGA with 18 years of experience in transportation infrastructure design, traffic engineering and transportation planning. He has experience in transportation projects that include preparation of traffic studies including corridor studies, traffic impact studies, mobility studies and parking utilization and reduction studies. He is also specialized in signalization design, roadway design, managing, designing and permitting select transportation infrastructure engineering projects; planning, developing and coordinating civil engineering design documents; and coordinating construction engineering and inspection. Some of his relevant mobility plan experience includes development of citywide mobility plan for the City of Fort Lauderdale, preparation of the campus master mobility plans for Florida International University and Florida Atlantic University campuses as well as Memorial Health Care Joe DiMaggio Hospital campus. He is certified to prepare traffic control plans and process LAP projects by FDOT.

### PROJECT EXPERIENCE

**Transportation Manager, City of Fort Lauderdale -Managed and supervised the traffic engineering, transportation planning and transportation design program for the City of Fort Lauderdale (City) Transportation and Mobility Department including all Department traffic engineers and transportation planners.**

Managed the Downtown Fort Lauderdale Transportation Management Associations' (TMA) Citywide Sun Trolley community bus service including development of the Uptown Link and route extensions. Developed and submitted relevant grant applications for transportation and transit projects including TIGER, Transportation Enhancement, EPA Green Streets and FTA New Freedom. Developed the Capital Improvement Plan (CIP) for traffic, roadway, transit, aviation and parking improvement projects aligned with the City Commission Action Plan. Developed and Monitored Citywide Strategic Plan Performance Measures for Transportation initiatives including Sun Trolley/Community Bus Equipment, Routes and Fares. Developed the key citywide long-range transportation plan including the 2015-2035 comprehensive strategic multimodal program entitled Connecting the Blocks- Creating Options for Moving People-Created the City Complete Streets Guidelines

- Managed the citywide review of all transportation elements of the Development Review Committee to determine traffic impacts for new development projects submitted for approval. Included review of all traffic impact studies and parking studies and ensured that walkability and alternate modes of transportation was being provided along the transportation network adjacent to the development site.
- Collaborated with Government Agency Partners including the Downtown TMA. The Florida Department of Transportation (FDOT), Broward Metropolitan Planning Organization (MPO), South Florida Regional Transportation Authority, Broward County, Federal Aviation Administration and adjacent municipalities on all public transit, traffic engineering and transportation projects in the City.
- These included the following projects in the City Commission Action Plan:
- The Wave Streetcar, Florida East Coast All Aboard Florida, SR-A1A Rehabilitation and Modification projects, Broward Blvd Gateway Implementation Project, FDOT Advanced Transportation Management System Central Broward Corridor Project, Central Broward East West Transit, SFRTA Tri-Rail Coastal Link, Downtown and Uptown Mobility Hub Development Initiatives, Downtown Units Land Use Plan Amendment.

### EDUCATION

Bachelor of Science (BS), Civil Engineering, SOUTHERN ILLINOIS UNIVERSITY AT EDWARDSVILLE, Edwardsville, Illinois

### CERTIFICATIONS & LICENSES

Professional Engineer License (#58002)

ENVISION Sustainability Professional Certification

Advanced Maintenance of Traffic Certification (FDOT)

### PROFESSIONAL AFFILIATIONS

ASCE Region 5 Governor

ASCE Broward Past President

ASCE National Public Policy Committee

### AWARDS

ASCE Government Engineer of the Year (2013)

ASCE Engineer of the Year (2011)

ASCE Young Engineer of the Year (2006)



## Eric Czerniejewski, PE, ENV SP, Page 2

**FDOT District 6 Districtwide Public Transportation Consultant Contract** - Provided studies, performed evaluations, developed strategies, and secured funding for highway, transit, rail, freight and seaport projects while enhancing performance for all transportation modes. These analyses required expertise in collecting data, assessing the context, validation of data, analysis of demands, forecasting and growth and provided transit design and construction determinations in conjunction to responding to public and private stakeholders concerns. Completed the following projects as part of this Contract:

- Miami Dade Aviation Department (MDAD) Triennial Safety Audit of MDAD Automated People
- Mover Systems- Audit Review of the MDAD Transit Security Program Plan and System Safety Program Plan
- Miami Dade Transit (MDT) Triennial Safety Audit of Bus and Rail Systems- Audit Review of the MDAD Transit Security Program Plan and System Safety Program Plan

**Broward MPO Pompano Beach Education Corridor Transit Study** - Due Diligence was performed to determine the feasibility of a transit shuttle or circulator to improve access to the educational facilities along the Coconut Creek Parkway corridor that runs through Pompano Beach, Margate, Coconut Creek and Coral Springs. This included estimating capital and operating costs, identifying opportunities and/or constraints and coordinating proposed transit improvements with other plans or projects including: land use plans, traffic, roadway and sidewalk projects, interface with existing and future Tri-Rail service and Mobility Hubs for the Premium Transit Corridors at Sample Road and University Drive (Gateway Hub).

**Hallandale Beach Boulevard Corridor Improvements-** Project Manager who performed the design and permit approvals for Florida Department of Transportation (FDOT) and Broward County Traffic Engineering Department for the conversion of two Hallandale Beach one-way collector roadways, to two-way facilities. The two key issues addressed were evaluation of the geometrics and centerline transition through the intersections, as well as improving the overall travel time between US 1 and SR A1A. This included the evaluation of the existing and future vehicle delays in traffic flow on Hallandale Beach Boulevard. The geometric alignment included eliminating a southbound through movement for each intersection. The analysis of the traffic flow on Hallandale Beach Boulevard required a progression analysis of the traffic signals from US 1 to SR A1A, which detailed the net change in the signal cycles and the effect on the traffic flow. In addition, left-turn flashing arrows (permitted left turn), elimination of pedestrian crosswalks and modification to signals to eliminate crossing maneuvers, cycle reductions and improvement to traffic flow were also a part of the traffic analysis. Services provided included traffic engineering and transportation planning, signalization design, roadway design, drainage design, public participation and utility coordination. The signalization design included incorporation of upgraded pedestrian signal infrastructure, as well as revised signal phasing and timings.

**Coral Station at Brickell Way Traffic Impact Analysis** - This traffic impact study evaluated the anticipated traffic impacts within a downtown Miami area for a proposed mixed-use development. The site features offices, apartments, restaurants, retail and a parking garage. The analysis included data collection, trip generation and distribution, forecasted future volumes and a traffic signal warrant analysis. In addition, Consultant looked at other approved project traffic within a one-mile radius of the project to better predict the future capacity of the surrounding roadways. Synchro capacity analysis software was used to evaluate traffic operations and followed MUTCD guidelines for the traffic signal warrant analysis.

**Florida Department of Transportation (FDOT) District 6 Biscayne Boulevard (NE 5th Street to NE 13th Street)** - In order to continue the enhancements of the US 1 Corridor for the City of Miami, Consultant developed a streetscape design to unify the area surrounding the American Airlines Arena, Bicentennial Park and the Performing Arts Center. Enhancement of the pedestrian corridor and integration with the existing Roberto Burle Marx paving design, directly to the south, was integral in the design of the project. Coordinated with the City of Miami during the design process, participated in numerous public involvement and design meetings, and incorporated access management concepts, including limited vehicular access and multi-modal transportation. Improvements included specialty paving and lighting elements. This project was part of a multi-year continuing service contract with FDOT District 6.



## Michael Conner, RLA, ASLA *Senior Landscape Architect*

### SUMMARY OF QUALIFICATIONS

Mr. Conner has more than 30 years of combined experience in municipal, commercial, and private sector work. As a Registered Landscape Architect and a Certified Arborist, he is also knowledgeable in all aspects of urban and community forestry planning and tree inventory and appraisal – particularly in built-out environments in the South Florida area. His expertise lies in site planning, hardscape and landscape design. He also has successful experience in public space creation and planning, environmental mitigation, contract administration, site inspections, and grant writing. **He will contribute his expertise in native planting, arborist services, and landscape construction administration for landscape projects.**

### PROJECT EXPERIENCE

**Library Park, Weston, Florida; Project Manager, Lead Designer.** Responsible for the design detailing and construction administration of a five-acre passive-use park with a signature fountain component, outdoor classroom facilities and a historical narrative trail adjacent to a public library, a middle school and a high school. Mr Connor provided site design beyond the conceptual level, planting selection and irrigation design, implementing the City's adopted wayfinding and branding components, visibility and security design, and coordination with an architectural sub-consultant for the development of restroom facilities.

**Peace Mound Park, Weston, Florida; Project Manager.** Responsible for the design detailing and construction administration of a waterfront passive park with the purpose of ensuring celebrating the existence of an archaeological Tequesta Indian burial mound. Mr. Connor was responsible for conducting an audit of over 200 existing trees, determining their health and relocation parameters and coordinating the mitigation of any vegetation that needed to be removed.

**Bonaventure Boulevard and Blatt Road Roundabout, Weston, FL; Construction Landscape Architect:** Provided landscape design and coordinated with traffic, electrical and civil engineering for a new roundabout. The project included the integration of landscape planting signage, branding, wayfinding, lighting, bicycle trails and pedestrian pathways.

**NW 27th Avenue Streetscape, Miami-Dade County, Florida; Project Manager, Lead Designer.** Developed a planting and irrigation design for the FDOT roadway through two cities and several districts. Mr. Connor was responsible for all permitting and coordination of several consumptive-use permits for varying zones through various segmented agencies and three municipalities, the implementation of City wayfinding and detailing specialty planting design to provide each city with their own character.

**Memorial Regional Hospital 35th Avenue Streetscape, Hollywood, Florida; Design Team Member.** Responsible for the construction detailing of hardscape components and planting for a streetscape design and wayfinding for a re-dedicated roadway segment to the hospital campus as part of this LEED-Gold project.

**SW 48th Avenue Median Enhancement, West Park, Florida; Project Manager, Lead Designer.** Assisted the City in obtaining grant funding for the beautification of roadway medians. Provided landscape and irrigation design as well as construction administration for the four-block project.

### YEARS OF EXPERIENCE

25+

### EDUCATION

B.S. Landscape  
Architecture  
Ball State University,  
Indiana, 1985

B.S., Environmental  
Design  
Ball State University,  
Indiana, 1985

Ball State Honors College  
Sigma Lambda Alpha,  
Landscape Architecture  
Honor Society

### PROFESSIONAL REGISTRATION

Landscape Architect,  
Florida License  
#LA0001181

ISA Certified Arborist  
License #FL0777

### PROFESSIONAL ASSOCIATIONS

American Society of  
Landscape Architects  
Chairperson 1990  
Broward Section

Florida Urban Forestry  
Council  
President 1999

Landscape Inspectors  
Society of Florida

International Society  
of Arboriculture



## Curt A. Keyser, PE

*Director of Engineering*

### SUMMARY OF QUALIFICATIONS

Mr. Keyser has more than 20 years of leadership, management, and engineering experience, including full P&L responsibility. He has an extensive project management background that includes 350+ storage tank compliance programs, 200+ corporate image re-branding initiatives, and multiple ADA compliance upgrade design projects for such companies as BP, Shell, Texaco, Hess, and others.

- Operations Leadership – Possesses solid experience and proven success in managing complex operations, cross-functional teams, and million-dollar budgets. Equally effective as a leader and key contributor. Applies a hands-on, participatory approach to team management that celebrates employee success and provides ongoing feedback for improvement.
- Strategic Planning and Execution – Maintains effective balance between big picture, strategic thinking and a focus on the details necessary for program execution. Success in achieving buy-in from upper management for key strategies.
- Organizational Change Management – Frequently serves as a key catalyst for change and manager of game-changing initiatives, including mergers/ acquisitions, market downturns, and turnarounds for under-performing operations.

### PROJECT EXPERIENCE

**Pinnacle Development Services, Fort Lauderdale, Florida.** As president, held full P&L responsibility for engineering consulting firm, managing team of seven and a \$1.2 million annual budget. Drove sales initiatives, including bid and proposal preparation/submission. Oversaw all design and permitting work.

**Petropac Solutions, Fort Lauderdale, Florida.** Vice president of engineering, branch manager; promoted to direct all aspects of 11 departments within the largest branch operation of a \$35 million retail petroleum service company, as well as directing engineering projects/initiatives. Supervised team of more than 100 and administered a \$20 million annual budget, reporting directly to the company president. Oversaw all activities involving general construction, engineering, permitting, facilities maintenance, petroleum contracting, and environmental compliance. Maintained relationships with a client base that included Shell, 7-Eleven, BP, Texaco, and Amoco.

**D.F. Consultants, Fort Lauderdale, Florida.** General manager; scheduled, executed, and managed all engineering and permitting tasks for a retail petroleum consulting firm, leading a team of 10 that included CADD draftsmen and permit expeditors. Serviced a client base that included Chevron, Mobil, Hess, and Shell among others. In charge of overall quality control and improvement for engineering drawings and documents.

**Shell Oil Company, Fort Lauderdale, Florida.** District engineer; promoted to handle construction and related functions (including due diligence, design, and permitting) involving new retail sites and major capital investments. Planned and administered \$20 million annual budget.

### WATER AND WASTEWATER TREATMENT PLANT CONSTRUCTION AND RENOVATION

**Water Treatment Plant Communications Towers, Palm Beach County, Florida.** Project manager and engineer-of-record for design and construction of communications towers at Palm Beach County Water Treatment Plant #9, Water Treatment Plant #11, and Morikami Park Reclaimed Water Treatment Plant.

### EDUCATION

Bachelor of Science in Mechanical Engineering  
Virginia Polytechnic Institute & State University,  
1990

### CERTIFICATIONS & LICENSES

Professional Engineering Licenses, Florida (#51407) and Pennsylvania (#PE053306E)

Certified Building Contractor License, Florida (#CBC1250810)

Certified Pollutant Storage Systems Specialty Contractor License, Florida (#PCC56807)

Certified Underground Utilities and Excavation Contractor License, Florida (#CUC1223786)

Certified Plumbing Contractor License, Florida (#CFC1425870)

Certified Mechanical Contractor License, Florida (#CMC1249334)

### PROFESSIONAL AFFILIATIONS

Member: American Society of Civil Engineers, Florida Engineering Society, and National Society of Professional Engineers

Member: Cooper City's Planning and Zoning Advisory Board, 2000 – 2004; Served as Board Chairman, 2003 – 2004



## Curt A. Keyser, PE, Page 2

**Water Treatment Plant Degasifier Improvements, Delray Beach, Florida.** Project manager for major improvements to the odor control system at Palm Beach County Water Treatment Plant #3.

**Water Treatment Plant Hypochlorite System Improvements, Delray Beach, Florida.** Project manager for major improvements to the hypochlorite pump and piping system, including removal and replacement of all pumps, pipes, valves, meters, and appurtenances within the existing hypochlorite room at Palm Beach County Water Treatment Plant #3.

### UTILITIES INSTALLATION

**Eagle Transport Lift Station and Force Main Installation, Port Everglades, Florida.** Project manager for abandonment of septic system and installation of new lift station with two-inch diameter HDPE force main connected to existing eight-inch sanitary force main.

**Gravity Sewer Main Extension, Miami Gardens, Florida.** Project manager and engineer-of-record for abandonment of septic system and installation of new oil/water separator, 130-linear-foot, six-inch diameter sanitary lateral, and 425-linear-foot, eight-inch diameter gravity sanitary main connected to existing sanitary manhole. Project included open-cutting and maintenance of traffic for busy six-lane thoroughfare.

**Advance Auto Parts Lift Station and Force Main Installation, Hollywood, Florida.** Project manager and engineer-of-record for installation of new lift station with two-inch diameter x 1500-linear-foot HDPE force main connected to existing eight-inch sanitary force main.

**Shell Oil Lift Station and Force Main Installation, Plantation, Florida.** Project manager for abandonment of septic system and installation of new lift station with two-inch diameter x 1200-linear-foot HDPE force main connected to existing eight-inch sanitary force main.

### ROADWAY AND DRAINAGE DESIGN

**Pines Mobil Turn Lane, Pembroke Pines, Florida.** Project manager and lead designer for increased storage and taper at left turn lane from northbound University Drive to westbound Pines Boulevard in connection with the redevelopment of the Mobil gas station on the northwest corner of the intersection.

**Pines Boulevard Bus Stop, Pembroke Pines, Florida.** Project manager and lead designer for Broward County Mass Transit Authority bus stop bay on north side of Pines Boulevard West of University Drive in connection with the redevelopment of the Mobil gas station on the northwest corner of that intersection.

**Shell Access Road, Dania Beach, Florida.** Project manager and lead designer for access road, and associated drainage, from Stirling Road to rear of proposed Shell gas station for future development of a hotel.

**NPDES Municipal Separate Stormwater System (MS4) 2013 Annual Report, City of Weston, Florida.** Project manager for the preparation of the City's annual report. Coordinated with City's director of public works to collect and assemble required data and to complete and submit report in compliance with FDEP requirements.



## Antoine Jackson

### GIS Specialist

#### SUMMARY OF QUALIFICATIONS

Mr. Jackson has managed federal, state and local projects. He has more than 15 years of experience in civil engineering and GIS. His expertise includes conveying GIS/spatial information to a non-GIS/technical audience. His experience includes GIS spatial and attribute data management, integrating data from disparate sources, defining data types, identifying data anomalies and responding to business requests for database changes.

#### PROFESSIONAL EXPERIENCE

##### Calvin, Giordano & Associates - Fort Lauderdale, Florida USA - GIS Specialist

- Member of Data Technologies and Development Division
- Assist GIS Manager, Project Managers and / or Project Engineers in various GIS related projects
- Daily activities included the production of spatial data, development and maintenance of spatial
- Enterprise databases, topological analysis, data conversion between various formats, and spatial analyzes
- Develop tools to automate the monthly updates of parcel ownership (Created custom ArcToolbox tools to automate monthly property updates)
- Collaborate in the ten-year program of the Office of the U.S. Census [2010 Decennial Census Local
- Programming using VBA Script language in order to customize ArcPad applications  
7x

##### Cogent Infotech, Miami Dade County. GIS Analyst

Develops a wide variety of computerized maps and map layers through the use of automated drafting equipment by interpreting source data, electronically drafting or digitizing the information into the computer data base, adhering to pre-established Assessor and GIS mapping conventions and following pre-established procedures and sequences; quality assures layers for accuracy; identifies and corrects GIS errors; establishes and maintains GIS and computer data files; determines scale, line size and color to print hard copies of computerized maps using a plotter; trains staff to interpret source documents and use automated drafting equipment; may act as departmental liaison regarding the Geographic Information System (GIS); may assist in writing and simplifying procedures; may act as a lead worker to extra-help staff; graphically depicts parcel splits, combinations and land boundary adjustments, including subdivisions, condominiums and townhouses, through the use of computer aided drafting techniques and tools, by interpreting and researching legal descriptions on recorded deeds and survey maps; prepares chronology of changes to parcels requiring additional research; transfers revised parcel drawings to Assessor computer files and the County GIS utilizing standards and protocols appropriate to each function; calculates land areas; annually revises parcel maps to reflect tax code area changes by evaluating information provided by the State Board of Equalization; answers questions and provides information to the public and staff regarding assessment maps; prepares legal descriptions of tax delinquent properties, describing property boundaries in relation to adjacent properties by researching and combining existing descriptions; completes supporting forms, paperwork and correspondence to relay completion of parcel changes to the property owners and staff.

#### EDUCATION

Oklahoma Comm. College,  
Oklahoma City, OK  
Drafting Degree

Rose State College  
Midwest City, OK.  
Associate Degree  
Electrical Engineering

#### TRAINING

Formal training for Geo  
Media, Huntsville, Alabama

ESRI Arc Map at Metro  
Tech, Norman, OK



## Antoine Jackson, Page 2

### **Aerotek, Williams Energy. GIS Analyst, 09/12 - 02/14**

- Maintain geospatial attributes associated with the pipeline system
- This includes maintaining the centerline position of the pipeline, valve locations, pipe attributes and other information that pertains to the pipeline that are stored in SDE and SQL database
- Responsible for generating alignment sheets, HCA maps and risk assessment data sheets
- I used ESRI products and custom pipeline application will be utilized to perform tasks and develop solutions that are unique to each project
- Coordinate with engineering to define potential HCA impacts as defined in CFR49 Part 195 and will be a member of the audit team responding to DOT audits; manages and maintains data for National Pipeline Mapping System (NPMS) annual submission
- Worked directly with field personnel to collect, process, incorporate and correct data for pipeline updates
- Conducts research, queries, and creates custom data and maps for various internal customers
- Responsible for data acquisition and integration as new pipeline systems are acquired
- Support GIS department with basic mapping assistance, research, and printing
- Assist with data acquisition and integration when new pipelines and/or facilities are acquired
- Create, maintain, and input pipeline information into GIS-based pipeline management and maintenance system
- Input pipeline maintenance records
- Verifying data using PODS, ArcGIS PODS tool bar and of PODS data model organization

### **Randstan Engineering, Shell Oil Houston, GIS Analyst. TX 05/12- 08/12**

Responsible for completing assigned tasks under the supervision of the Project Manager. Under limited supervision, assists in the design, development, implementation, and maintenance of systems, software, GIS, and data integration solutions to administrative, scientific and technical problems through the use of computer technology.

- Develops and modifies simple applications and scripts using ArcObjects, Python, VBScript Oracle, and Model Builder
- Participated in documentation compliance reviews and related remediation for system security and controls
- Creates new computer programs or edits existing programs in order to produce maps and automate procedures
- Maintains databases for GIS-related metadata
- Writes documentation as necessary
- Participates as needed, in meetings with developers and client staff to fully understand expected project outcomes
- Works cooperatively with managers to complete assigned work
- Proactively seeks input and clarification from other employees assigned to given projects in order to minimize time spent in performing the essential duties of the position

### **City of Houston, Houston, TX, Project Tech. 02/08-04/12**

Work closely with the Engineering & Construction Division's Substitute Services Program. Obtains the property owner's signed right of entry agreement for the sanitary sewer and water CIP projects that require substitute service. I prepared technical standards, engineering drafting of plans for various projects. I have developed a data base for the Developers Participation Contracts using Access, VB, and Arc Map. Performs reference drawings and obtain project data from outside sources. Prepares, maintains, and updates reports and records. Conduct field investigations.

- Mapped existing and future water, storm and sewer routes
- Reviewed customer's as built plans
- Create maps and graphs, using GIS software and related equipment
- Review water/wastewater as-built and additional engineering drawings
- Use additional ESRI tools to validate and modify GIS layers
- Gather, analyze, and integrate spatial data from staff and determine how best the information can be displayed using GIS



### Antoine Jackson, Page 3

- Compile geographic data from a variety of sources including censuses, field observation, satellite imagery, aerial photographs, and existing maps
- Analyze spatial data for geographic statistics to incorporate into documents and reports
- Design and update database, applying additional knowledge of spatial feature representations
- Enter new map data through use of a digitizer or by direct input of coordinate information using the principles of cartography including coordinate systems, longitude, latitude, elevation, topography, and map scales
- Analyze geographic relationships among varying types of data
- Prepare metadata and other documentation
- Move, copy, delete, and add files, drawings, and maps to output reports in hard copy or electronic transfer
- Present information to users and answer questions
- Retrieve stored maps



## Timothy N. Rodriguez

*Applications Development Manager*

### SUMMARY OF QUALIFICATIONS

Mr. Rodriguez is the Applications Developer Manager for the Data Technologies and Development Group at Calvin, Giordano & Associates. He holds more than eleven years of experience in programming technologies such as VB, VB.Net, C#, COM+, ASP, JAVA, XML, XSL, MSSQL Server 7.0 – 2008, Crystal Reports, Reporting Services 2005, AJAX, Team Foundation Services, MS Project 2010, ESRI ARC GIS Server. Tim has successfully created and deployed various projects in regards to critical business processes which required him to assess, gather, and develop requirements which carefully adhered to the budget and scheduling constraints.

### PROJECT EXPERIENCE

#### **INKforce.net Enterprise Government Software**

Designed, and helped developed a web-based data driven, GIS, building and permitting, code enforcement, planning and zoning and online payment portal system to help automate the process of everyday functions for the each municipality listed.

- City of Weston Florida
- City of West Park Florida
- Town of Pembroke Park Florida
- City of Pembroke Pines Florida
- Miami Dade County Florida
- Town of Lake Park Florida
- City of Madeira Beach
- Managed the enterprise wide software rollout of the INKforce.net enterprise software solution
- Managed the deployment of our enterprise wide support ticketing software
- Responsible for rolling out the Team Foundation Services software application which incorporates all areas of our software development cycles and PNPs
- Continue managing a group of software developers which provide customized processes, reports and analytics for both internal and external customers
- Responsible for continued development in budgeting, resource allocations and projections for growth management
- Responsible for documenting and discovering new opportunities for the firm's external customers' business requirements.
- Facilitated in the design and project management of the proposal tracking system. This application was customized to create, monitor, track and provide analytical reports specific to the proposal process. The systems internal workflow was constructed to provide much need constraints by introducing a role based security platform which added several levels of auditing capabilities at every stage within the proposals lifecycle.
- Designed and developed a web-based data driven, GIS surveying system to automate the process of collecting evacuation responses for Palm Beach County. The system provided county employees the ability to collect, analyze, compile problem areas in relation to disaster management evacuation
- City of Odessa Texas
- Prince George County Virginia
- City of Pompano Beach Florida
- City of Greenacres Florida
- City of Sunny Isles Beach Florida
- Town of Lauderdale By The Sea
- Palm Beach County

### YEARS OF EXPERIENCE

11+

### EDUCATION

Master of Business Administration Florida International University, 2012

Bachelor of Science in Management Information Systems, Florida International University, 2007

### PROFESSIONAL ACHIEVEMENTS

Vice President of Miramar, Pembroke Pines Chamber of Commerce Leadership Group XXII 2009

Addressed Governor Crist on behalf of Young Professionals during the Governors breakfast (Broward Days 2009)

First ever recipient of the Corporate Annual Continues Improvement Award, 2004 (American Mobile Healthcare)

Active Member of the GCUG (Gold Coast User Group) for Microsoft Developers and Professionals

Active Member of PASS (Professional Association for SQL Server Technologies)

# Village of Estero

Request for Qualifications  
For General Planning Services  
For the Village's  
Community Development Department  
RFQ #2015-01

August 5, 2015



**LaRue** Planning  
& Management Services, Inc.

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Serving Florida Local Governments Since 1988



# LaRue Planning & Management Services, Inc.

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August 5, 2015

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

RE: RFQ No. 2015-01 for General Planning Services

Dear Mr. Lombardi:

LaRue Planning & Management Services, Inc. (LaRue Planning) is pleased to submit this statement of qualifications to the Village of Estero (the Village) in response to RFQ #2015-01 for General Planning Services for the Village's Community Development Department. We at LaRue Planning are uniquely qualified to provide the planning and zoning services requested by the Village effective October 1, 2015. This includes all of the services requested with the exception of IT and building services.

LaRue Planning is unique in that we specialize in serving only Florida municipal/county clients. This enables us to serve our local government clients with absolutely no potential for conflict of interest with developers. You can expect to receive unbiased consultation, specialized solutions, and deadlines met, as specified by the Village. Since 1988, we have dedicated ourselves to current and long range local government planning and zoning representation. Specifically, we work alongside local government staff and officials to provide zoning code interpretations and zoning review of applications for building permits and business tax receipts as well as preparing staff reports for variances, special exceptions, site plans and comprehensive plan amendments; presenting public hearing items to staff, advisory boards, and local government elected policy makers. Our extensive and varied expertise in writing and revising land development codes can also be a useful asset to the burgeoning Village.

In response to the Village's request for qualifications, and following a careful review of the scope of services, we've assembled a team comprised of members of the American Institute of Certified Planners (AICP). Each member of the project team is selected based on their overall planning experience, combined with their expertise and the unique needs of the Village. This ensures continuity for each project assignment, from the initial activities through

implementation. We have built a reputation providing the services the Village of Estero is requesting. LaRue Planning team members' backgrounds include comprehensive planning, zoning, landscaping, land use, economic development, transportation planning, urban design, architectural illustration, historic preservation, GIS mapping, annexation analysis, and land development regulations. Our team's goal is to protect the Village's best interests while prioritizing issues and presenting practical solutions within an environment of active public participation.

Our team approach on all current and long range planning assignments will provide you with a group of talented professionals ideally suited to meet the Village's needs. As President of LaRue Planning, I am the authorized representative of the project team. The following is my contact information:

LaRue Planning & Management Services, Inc.  
1375 Jackson Street, Suite 206  
Fort Myers, FL 33901  
239-334-3366  
jim@larueplanning.com

Our team looks forward, with great enthusiasm, to the opportunity of working with Florida's newest municipality, to perform a variety of services. For further information regarding our firm, please see the attached project approach, and accompanying support material.

Sincerely,



James G. LaRue, AICP  
President



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## PROJECT APPROACH

From our office in the Fort Myers River District, LaRue Planning has worked with over 60 municipalities and 22 counties throughout the state of Florida.

Planning consultants are a vital part of the local government planning process, functioning as contract planners and acting as representatives of each local government they serve. Consultants provide as-needed technical expertise and can specifically focus on priority planning objectives when in-house planners do not have adequate time to take on such projects. To be effective, planning consultants must have a variety of skills, with an ability to listen and communicate clearly with the staff and public when presenting planning issues and solutions. Additionally, a successful planning consultant must project absolute objectivity in any assignment that is undertaken, while invoking ample public participation and consensus.

LaRue Planning thoroughly understands the role of being a planning consultant or a contract planner to the Village of Estero. Our firm's team members are adept in supplementing staff skills, while presenting fresh and new approaches to solving various planning challenges facing the Village. We are proficient in master planning concepts and experienced in providing site plan review and writing meaningful land development regulations. We routinely prepare comprehensive plan amendments and major updates. We have performed special studies, and analyzed annexation impacts.

Our firm routinely performs zoning and planning assignments similar to those requested in the Village's scope of services. Our longevity in serving our local government clients demonstrates our commitment and professional expertise to see a planning project through from commencement to completion and meeting staff report deadlines consistently. Whether updating a community plan or designing a form-based code for a community redevelopment area our firm can be counted on to finish a project even when unexpected challenges emerge. Developing a scope of services, time schedule, and delivering a set of tasks within budget are equally important and we live up to those expectations with each planning project that we complete.

At the outset of each project or task, we will conduct an organizational session with the Village. This allows the project team to formulate a clear understanding of the project goals and objectives. Following this session, a set of detailed strategies will be outlined to accomplish the agreed upon goals, prepare an effective work plan outlining all work elements including scope, schedule, and budget for all participants. This plan allows us to address responsibilities, authority, communication document control, invoicing, progress reporting, quality control, and other major work elements.



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Our team members were involved with the City of Bonita Springs since its incorporation and were responsible for writing the City's first Comprehensive Plan. This work experience enables our team to recognize issues and opportunities that arise as a normal course of being a new municipality. Our team's years of providing local government services gives us the ability to foresee these issues and opportunities arising from these circumstances and will help the Village prepare for those times when things change over the course of a planning horizon, project, or a council meeting.

We are available on a daily basis to provide individualized service and customer support for our local government clients. If the services for a particular client include planning and zoning review of applications for building permits, site plans or zoning requests, we can process those requests with exceptionally short turn-around times. When developers and residents have inquiries regarding the land development regulations, comprehensive plan, or an application process, we are always available by phone and email to provide residents and developers with responses to their inquiries. Depending on the complexity of the inquiry, we often provide a determination within the same business day.

When applications are submitted to the Village for development orders, development permits, comprehensive plan amendments, deviations, appeals, zoning changes, annexations, development agreements, planned unit developments, plats and replats, we are prepared to work with Village staff to ensure that those applications are handled as efficiently and correctly as possible. We will ensure that all applicants' projects conform to Village, County, State and Federal regulations.

In conclusion, the LaRue Planning & Management Services team is eager and willing to successfully accomplish all current and long range planning assignments needed by the Village. Our firm has performed the services requested for numerous clients in a successful manner and look forward to beginning a professional relationship with the Village of Estero.



# Project Team



**LaRue** Planning  
& Management Services, Inc.

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Serving Florida Local Governments Since 1988

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## PROJECT TEAM



**James G. LaRue, AICP**  
President

Jim began his renowned career in Florida local government over 35 years ago with positions ranging from city planning and zoning director to county administrator. Jim's strong, committed background in local government administration and planning is apparent in his incisive ability to assess any organization's needs and readily suggest workable planning solutions based on his practical communication and consensus building skills. He possesses the essential strengths of a problem solver and a successful project manager.

President of LaRue Planning & Management Services for over twenty-five years, Jim has proficiently worked as a consultant to Florida's cities, counties and special assessment districts, providing management and planning solutions expressly customized to each entity. Organizational assessments, CRA planning, teambuilding and customer-related management services have all been tailor made to meet his clients' needs. Jim's expertise preparing annexation impact studies, comprehensive plan amendments and updates, redevelopment plans and land development code revisions enables him to be a liaison between clients and the public, always focusing on providing the most satisfactory solutions for each local government client and its residents.

Jim continues to work closely with all of his clients, realizing that each client has their own unique, individual needs whether it is for a comprehensive plan amendment or for a major revision to a land development code. Jim believes in the philosophy of working only with the public sector clients, thereby avoiding any conflict of interest between his clients and private developers.

Jim, as President of LaRue Planning, is an active "hands on" project manager committed from start to finish on all company projects. As project manager for the Village of Estero's planning tasks Jim will work closely with the Village's assigned project manager. In viewing the list of possible assignments for Estero, it is noted that they are consistent with those our company has performed with Jim serving as the project manager.





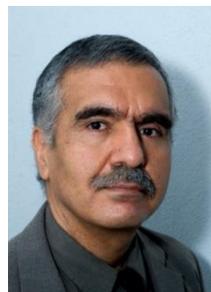
**Wm. F. Brisson, AICP**  
Senior Planner

Bill has been a professional “problem solver” and expert witness in the fields of planning, marketing and economic analysis since 1970. Having consulted for both the public and private sectors, he views the planning challenges facing our communities from both perspectives, lending practicality to the art of planning. Bill’s ability to identify the core aspects of a problem and attention to detail have resulted in creative solutions to a variety of complex issues for communities throughout Florida. He is proficient in GIS related mapping and acts as our firm’s representative in providing quality products for communities such as major Land Development Code rewrites and Comprehensive Plan updates. Bill is an integral part of the LaRue Planning team, his knowledge and experience is invaluable.



**Benjamin L. Smith, AICP, LEED GA**  
Senior Planner

Ben joined LaRue Planning & Management in 2007, after receiving his Bachelor’s Degree from the University of Florida. He is an AICP certified planner and has also earned the designation of Leadership in Energy and Environmental Design Green Associate (LEED GA). As a Senior Planner, he is an active member of our development review team reviewing rezoning applications, site plans, and variances for many of our government clients; and presenting staff reports to local government elected bodies. He is skilled in Comprehensive Plan amendments, as well as Land Development Code and CRA plan revisions. Ben has participated in drafting Smart Code regulations for various overlay districts which have become the core of several Community Plan Land Development Codes.



**Mohsen Salehi, AICP, ITE (F)**  
Senior Consultant

Mohsen possesses strong analytical skills and technical background. A seasoned project manager and award-winning planner, Mohsen has played a major role in planning and development review, including DRIs, traffic and parking studies, impact fees and proportionate share calculations for concurrency determinations. He has developed master planning/urban design concepts for context sensitive corridors and is well-versed in ‘complete streets’ standards. Mohsen has been assisting various county and municipal governments and private clients throughout Florida in land use/transportation/infrastructure planning and redevelopment.





**James Leese**  
Senior Consultant

James relocated to Southwest Florida after more than 30 years of practice in the Denver and Kansas City areas. His experience includes urban design, planning, and architecture specializing in urban mixed-use, residential apartments and loft condominiums, mixed-use parking garages in urban centers, and other urban core building types. James has drafted design guidelines for the Bonita Springs Downtown Redevelopment Area and developed illustrations for the Page Park Community Land Development Code. James was the principal planner in developing a form-based Town Center Code for the North Fort Myers Community Land Development Code, and updates to the City of Sanibel's architectural standards and guidelines for the resort housing district.



**John Bry**  
Senior Consultant

John is an expert in historic preservation and has specialized in various community revitalization projects over the last 20 years. He is adept in finding funding opportunities for revitalization and redevelopment, ranging from historic tax credits to grant funding. John has knowledge of the Estero community, as one of his previous projects included the creation of a maintenance plan for the historic Koreshan Cemetery under a zoning agreement between Lee County and the developer for the property.

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## PROJECT TEAM RESPONSIBILITIES



# James G. LaRue, AICP

## President

### Areas of Expertise

Comprehensive Plan Amendments  
Urban Design & Form Based Code  
Economic Development / Redevelopment  
Land Development Codes  
Strategic Planning  
Urban Planning  
Development Review

### Education

Masters in Urban & Regional Planning, Univ. of Iowa  
Masters in Political Science, Memphis State University  
Bachelor of Arts, University of Texas

### Experience

LaRue Planning & Management, 1988 - present

Florida Center for Public Management 1989 – present  
Adjunct Consultant/Trainer

Florida Counties Foundation 1993 – 2005  
Small Counties Circuit Rider

Florida Public Management Group 1990 – 1994  
Vice President

Lee County Government 1983 – 1988  
County Administrator, Assistant County Administrator

City of Deerfield Beach 1980 – 1983  
Assistant City Manager

City of Pompano Beach 1976 – 1979  
Zoning Administrator

### Professional Affiliations

American Institute of Certified Planners  
American Planning Association  
Florida City & County Managers Association  
Florida Planning & Zoning Association  
Florida Redevelopment Association  
International City Managers Association  
Certified Main Street Consultant

### Committees

*Broward County Planning Council*, member  
*Department of Community Affairs*  
EAR Technical Review Committee  
EAR Technical Advisory Committee 2004

### Honors and Awards

*Presidential Certificate of Merit*  
Broward County Clean Water Management Plan  
*US Department of Labor*  
Certificate of Excellence Summer Youth Program  
*FCCMA Lifesaver Award, 2001, 2002*  
*ICCMA 74<sup>th</sup> Annual Award*, Significant Contributions & Achievements in advancement of local government administration.  
*Lake Placid Resolution Honoring "Jim LaRue" Day*  
*Broward County Committee for Community Development*, Honors for Outstanding Community Service & Dedication to improve quality of life.

Mr. LaRue has more than three decades of Florida government and consultant experience with a strong background in local government administration and planning. As the President of LaRue Planning & Management for over 25 years, Jim has assisted Florida cities and counties providing specific management and planning solutions in the form of plan amendments, zoning and development plan review, redevelopment planning and Land Development Code revisions. Jim's ability to assess an organization's needs and suggest workable planning solutions is based on practical communication and consensus building skills. Jim also has a reputation for revitalizing local government planning and zoning options while accurately navigating through the regional and state review agencies expeditiously.

### Planning Project Experience

**Fort Myers:** Currently providing comprehensive planning services to the City. Prepared text amendments to the Comprehensive Plan, addressing the City's comprehensive disaster mitigation strategy, hurricane evacuation capacity, public shelter availability, and the Coastal High Hazard Area (CHHA) density cap. The amendments, found in compliance by DEO, allowed the removal of the CHHA density cap in the Downtown Redevelopment Area and other CHHA areas.

**North Bay Village:** Serving as the current planning and zoning official for the Village. Our Planning & Zoning services to the Village date back to the 1990's including development review, preparation of the EAR and large scale Comprehensive Plan Amendments. Facilitated vision setting sessions which included meetings with the Commission, private citizens and the business community. Completed the City's Public School Facilities Element, 10-Year Water Supply Facilities Work Plan and various Plan Amendments. Currently rewriting the Village's Land Development Code

**Sanibel:** Providing comprehensive planning services for the City by writing code language for vehicle-for-hire and sightseeing tour bus regulations. Other projects include developing architectural standards for new and major redevelopment and standards for permeable pavers.

**Satellite Beach:** Providing comprehensive planning services to the City. In 2014 initiated Complete Streets Plan Amendments. Adopted a Comprehensive Plan Amendment in 2012, addressing land use compatibility with state military installations. Completed the City's EAR and the EAR-based Plan Amendments, which were found to be in compliance in January 2010. In 2008, prepared the City's Public School Facilities Element and the 10-Year Water Supply Facilities Work Plan.

**Okeechobee:** As the Planning and Zoning Official for the City since 1996, provide the City with a variety of services which include development review, comprehensive planning and zoning. The bulk of the work has been addressing the ongoing current planning needs of the City in the form of responding to property owner inquiries, reviewing all land development applications including citizen initiated changes to the LDC, site plans, applications for rezoning, special exceptions, variances, platting/replatting, and street vacations.

**Moore Haven:** Serving as the City's planning consultant providing on-going planning services since 1998 including implementation of redevelopment studies and development of the Riverwalk CRA. In 2012 updated a CRA Plan which includes four sub-areas of the City, downtown Main Street, the Marina Area, US 27 Gateway Area and the Industrial Area. Provided the City with Plan Amendments, the EAR, EAR-based Amendments, 10-Year Water Supply Facilities Work Plan and the Public School Facilities Element, as well as revising the Capital Improvements Element to comply with State Statutes.



## Presentations

### Florida APA

*"Ethics as a Constant in a Changing World" – 2014*  
This ethics session focused on the legal and planning implications that arise when planners are making ethical decisions. The Planners AICP Code was compared to other professional codes and discussed in detail.

*"Ethical Implications in the Informational / Technological Age" – 2013*

This presentation / discussion session focused on current and future ethical planning behavior consistent with the AICP Code of Ethics and Professional Conduct. A self-assessment opportunity was offered to each participant plus a model "ethical action test".

*"The New World Looks Familiar" – 2012*

A lively panel discussion focused on planning topics that veteran planners vividly recall being handled a certain way in the "olden days". The same planning issues may be treated very differently today or they may have come full circle.

*"Show Me the Money: Bringing Reality to Redevelopment" – 2010*

This presentation discussed the analytical process including pro-formas, comparative marketing analysis, entitlements, interviews, compatibility, and design considerations, regulatory and economic viability needed to determine the most appropriate land use for properties.

### Florida Planning & Zoning Association

*"Page Park: Yesterday, Today, & Tomorrow" - 2011*  
The presentation focused on the Page Park community, a story in planning evolution, from its initial beginning as a full service army training base during WWII to a potentially viable thriving mixed use community.

*"Redevelopment Toolbox: Hybrid Planning Solutions that Work" – 2010*

The presentation focused on the redevelopment process and how to blend best planning practices with regulatory options to implement your community's vision.

### Florida City Clerks Association

*Keynote Address – 2008*

Growth Management Workshop – 2008, 2009

An overview of relevant statutory, administrative code and program implementation standards related to Florida's growth management and local comprehensive planning process.

**Lee County North Fort Myers:** Land Development Regulations were written to implement the Community Plan which is incorporated in the Lee County Comprehensive Plan. Lee County has not designated this area as a CRA but the North Fort Myers Community functions with autonomy and our firm worked with the Master Community Plan and recommended changes. Work tasks involved writing town center, neighborhood center, and corridor text focusing on uses, design standards and appropriate mixed-use regulations to induce quality development/redevelopment. Utilizing Smart Code techniques and traditional urban design approaches were fundamental to this project.

**Lee County Page Park Community:** In 2011 implemented a community plan via overlay land development regulations emphasizing urban design approaches that are community based. Specifically, the regulations implement the goals and policies adopted in the Lee Plan. These regulations have been adopted and include mixed use, streetscape, signage and urban design standards which ensure quality redevelopment for this stable Lee County unincorporated neighborhood.

**Key Colony Beach:** Serving as the City's planning official, prepared the EAR and the EAR-based Plan Amendments. Prepared the City's 10-Year Water Supply Facilities Work Plan, and recently completed the Work Plan Update based on the Lower East Coast Supply Plan update.

**Indialantic:** As the Town's Planning and Zoning Official have been providing professional planning services since 2006. In addition to our work on the Town's Comprehensive Plan, we provide as needed advice and assistance related to the Town Zoning Code and special zoning requests. At the Town Council's request, we prepared a special report assessing the appropriateness and possible consequences of allowing wind turbines in the Town's residential districts.

**Bonita Springs:** Served as the contract comprehensive Planning Official for the City from its incorporation through April 2010. Prepared Plan Amendments including the Bonita Beach Road large scale Plan Amendment and the Old US 41 Redevelopment Overlay large scale Plan Amendment. Planned the vision setting for the City's Comprehensive Plan; prepared the City's EAR, their first unified Land Development Code and revisions. Updated the Capital Improvements Element for compliance with Chapter 163 requirements and prepared the 10-Year Water Supply Facilities Work Plan, the Public School Facilities Element and the 2009 EAR-based Plan Amendments.

**Clewiston:** Provided the City with a new CRA Community Redevelopment Plan. Prepared the Clewiston CRA Plan Amendment 2010, focusing on the critical elements necessary to significantly influence restoration and conservation opportunities within the Boat Ramp area and the Commercial area of the City. Served the City as project director to secure EAR sufficiency and prepared major large scale Plan Amendments including the Gateway Mixed-Use District proposed development, and the EAR-based Amendments which included a new, optional Economic Element.

**Melbourne Beach:** Served as the Town's Zoning Official designated by the Town Manager and charged with the administration, interpretation, and enforcement of general Land Development Code administration, comprehensive planning, subdivision regulation, zoning regulation and zoning. Assisted in an update of the Town's current Land Development Code.

**Casselberry:** Assisted the City in performing a major EAR-based Plan Amendment containing policies responding to the new legislation requiring Green House Emission Reductions. The Plan Amendments were found in compliance by DCA in 2009

**Wewahitchka:** Served the City as planning consultant to provide an EAR of the 1990 Comprehensive Plan and the EAR-based Amendments. The EAR and Plan Amendments were adopted and found sufficient by the State Land Planning Agency.



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**James G. LaRue, AICP**

**Lake Placid:** Established the Town's Planning & Zoning/LPA Board; drafted Land Development Regulations and revisions including developing the official Zoning Map and sign ordinance. Served as the Town's Planning & Zoning Official for over ten years providing development review, rezonings and building permit services, and facilitated the Town's Vision 2010 session.

**Layton:** As the City's planning consultant, prepared the EAR, EAR-based Amendments, the 10-Year Water Supply Facilities Work Plan. Additionally, we provided the City with updates to the Capital Improvements Element in 2008 and 2009.

**Lake Worth:** Provided contract planning services to the City. Performed site plan reviews for applications in the Historic District as well as duties related to EAR-based Comprehensive Plan Amendments, Land Development Code Revisions, and the 10-Year Water Supply Facilities Work Plan.

**Village of Golf:** Prepared the Village's 2006 EAR and assisted the Village in complying with State Statutes for their EAR-based Amendments. Assisted the Village in preparing the Comprehensive Plan element revisions for the 10-Year Water Supply Facilities Work Plan.

**Davie:** Provided miscellaneous planning services to the Town including a comprehensive review of the sufficiency response for the Davie Commons DRI proposed development.

**Palm Springs:** Completed the EAR, EAR-based Amendments, CIE annual update; completed a major Comprehensive Plan Amendment package incorporating the Village's Future Land Use designations for about 80 newly annexed unincorporated properties which included new mixed-use Overlay Districts, all of which were found in compliance by DCA.

**Hendry County:** As the Planning Director tasks included review of any Comprehensive Plan Amendments, meeting with citizens, and coordination with the County Administrator, Board of County Commissioners and the Zoning Official on land use changes. Assisted in developing an Economic Development Strategic Plan and an Economic Element in conjunction with their EAR-based Comprehensive Plan Amendments. Assistance has also been provided to the County in the development of various grants related to economic development.

**Okeechobee County:** Provided planning and zoning services to the County including an EAR, strategic planning and visioning sessions and EAR-based Amendments.

**Desoto County:** Provided planning services to Desoto County developing the EAR, EAR-based Plan Amendments including an optional Economic Element, land use change applications review, and land development regulations revisions. Facilitated an Advisory Board Workshop on land use decisions for the Commissioners and County staff.

**Orange County and the Town of Windermere:** Land Use and Planning Study for the "Four Corners" area. Duties and tasks included an economic absorption and land use analysis for uses within the three mile radius of the intersection of Conroy-Windermere Road and Apopka-Vineland Road. Development of land use designations for each of the four quadrants in the intersection and the preparation of design/site standards for a Special Planning District for the Four Corners Study area. Study and recommendations were essentially approved without major changes by the Town and County and incorporated in a joint meeting.



### ***Management Project Experience***

**City of Venice: Fee Schedule Review and Analysis:** Comprehensive study and analysis of the City's Development Services Division's permitting and fee structure which included review of all development permits issued by the Building, Planning and Engineering Departments. The study also addressed administrative functions related to fee collection of Sarasota County impact fees, and City of Venice utility connection fees. The study included strategies for cost recovery, education of the fee structure to customers, and identification of potentially new and improved development services and processes.

**Lakewood Ranch Inter-District Authority:** Management development session. Discussion topics were "Ethics for Everyone" and "Customer Service that Works".

**Florida Institute of Government at FGCU: FSASE State Certification Program.** Assisted in providing a certification course, "Fundamentals of Leadership", for the Florida State Association Supervisors of Election.

**East County Water Control District – ECWCD:** Facilitated management development training for the ECWCD, Lehigh Acres Fire District, and the Lee County Mosquito Control District for the Certified Manager Program which focused on "Getting the Best from People".

**Clay County:** Facilitated management development training focused on customer service for the Planning and Zoning, Engineering, Building and Fire Marshal's Office. The theme of the training session was "Dare to be Great".

**City of Fort Myers:** Facilitated multiple staff management retreats for the Fort Myers' managers and their key staff. The retreats focused on establishing organizational values and teamwork principles to increase productivity, efficiency and effectiveness.

**City of Gainesville:** Seminars for personnel at the City of Gainesville. Staff Management Retreat for City Managers and their key staff and a Strategic Planning Retreat for the Planning & Development staff. Focus for the City Managers was establishing organizational values and teamwork principles to increase productivity, efficiency and effectiveness and organizational determinants and teamwork principles for the Planning & Development staff.

**Lee County Library System:** Provided the County Library staff with Management and Development techniques during two one-half day sessions.

**City of Marathon:** Management Assessment of the Ports/Marina Enterprise Services/Planning & Zoning, Building, Code Compliance, Engineering/Public Works Divisions. The divisions were evaluated using operational efficiency and effectiveness criteria. The methodology of this study was derived from meetings with the City Manager and key City Officials. Important documents such as the charter, budget, annual reports, policies, procedures, work programs, schedules and other materials, were reviewed and personal interviews with key management staff and employees were conducted. We provided the City with the findings, conclusions and recommendations in the report. Also provided Management Development Training to the City on two separate occasions.

**City of Boca Raton:** Comprehensive operational assessment of the City's building permit review process. The assessment included comprehensive analysis of costs, methods of operation, manpower and levels of service, and an efficiency/effectiveness assessment of the current operation and review of pertinent documents and specific processes, applications, etc.

**Pelican Bay: Incorporation Study.** Assisted the John Scott Dailey Florida Institute of Government at Florida Gulf Coast University in developing a communication tool for educating Pelican Bay property owners on incorporation with a specific emphasis on the Community of Pelican Bay.

**Lee County EMS:** Union Negotiations: Management negotiator for the EMS to provide assistance during the Union Negotiations with the County.



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**James G. LaRue, AICP**

**Florida Counties Foundation:** Small Counties Technical Assistance: Served as one of the three "Circuit Riders" for the Florida Counties Foundation, Small Counties Technical Assistance Program. Counties served included: DeSoto, Dixie, Flagler, Gilchrist, Glades, Hardee, Hendry, Highlands, Levy, Okeechobee, and Sumter. This Technical Assistance Program involved designing and conducting organization needs assessment for each county, developing county work plans, providing assistance during the implementation of the work plans, and final data analysis and reporting on the individual county's programs.

**DeSoto County:** Revenue Alternatives Analysis: Conducted a comprehensive analysis of various ad valorem revenue alternatives to assist the County in developing new and enhanced revenue sources. Analysis included evaluating and providing preliminary revenue estimates for electric franchise fees; MSBU's for solid waste disposal, law enforcement, drainage and roads; increased return on investments; increased mobile home license fees; and other current and potentially new revenue sources.

**Florida Center for Public Management:** Urban Partnership Initiative: Technical assistance to the St. Petersburg/Harbor Dale-Conquina Key Neighborhood Revitalization Team. Tasks included monitoring and analyzing the planning/implementing process in St. Petersburg; Development of a "How To" Manual on Neighborhood Revitalization; and Development of Legislative Package for the 1997 Florida Legislative Session by working closely with the Urban Partnership staff.

**Hendry County Property Appraiser:** Management Assistance: Facilitated two one-half day workshops on team building, conflict management, goal setting, and communication skills with Property Appraiser and entire staff. Provided on-going management assistance to Property Appraiser for several years.

**Collier County:** Management Assistance to County Manager: Assisted the County Manager in developing management advice and assistance which included task/time flow analysis for the office and examination of work tasks for the Assistant County Manager's position.

**City of Boynton Beach:** Manager Assistance: Interim management and planning assistance for the City. Issues involved CDBG, Land Development Code and other growth management related subjects.

**City of Holly Hill:** Manager Assistance: Operational assessment of City government work force as part of City's budget review included an analysis of the traditional police organizational profile versus public safety model. Recommendations were followed and resulted in \$250,000.00 savings of personnel costs for fiscal year 1995.

**Volusia County:** Financial Analysis: Reviewed and analyzed selected portions of independent financial audits of Volusia County and the 14 municipalities within the County, dealing with transportation expenditures, as defined in Section 336.025(7), Florida Statutes, for the preceding five years (FY 1987-88 through FY 1991-92).

**Collier County:** Development Review Analysis: Established a streamlined development review system for site plan projects. Tasks included defining thresholds for projects to be reviewed, development of system policies, procedures, etc., organizational analysis and assistance in training and implementation. Recommendations were fully implemented by the County.

**City of Fort Myers:** Utilities Audit of Sanitation and Water Assessments: Performed a study to evaluate all the processes used in the City's billing system for solid waste and water. The audit included areas of improvement as well as practical recommendations. The methodology of the study included random surveying of customers of the sanitation and water services provided by the City, one-on-one interviews with management and staff of the department, and a review of the City's billing system for solid waste and water.

**City of Fort Myers:** Management Assessment and Communication Advancement Program: Organizational study to examine the local government structure of the City to determine its level of efficiency, effectiveness, and competitiveness in the arena for delivering municipal services to its citizens and customers. The methodology of the study included an interview guide prepared with approval by the Project Coordinator and the Mayor. Face-to-face interviews were conducted with 38 people in the category of department head or those having a key management position. City documents, procedures, and policies were examined along with various sources of information describing current programs and projects.



**Okaloosa County:** Organizational Development: Provided an in-depth organizational analysis to the County by analyzing their Planning and Inspection Department, as well as, provided customer service and leadership training to the County Manager.

**Flagler County:** Organizational Study: Reviewed the County's current management and operations practices, as well as the organizational structure, functions, policies, practices, and procedures to determine what changes, if any, were necessary to provide services to the citizens in the most effective and economical manner feasible. Both immediate and long term goals and objectives were addressed. Flagler County also was compared, from an organizational standpoint, with other Counties similar in demographics and other meaningful characteristics.

**City of Pompano Beach:** Organizational Study: Provided professional services to the City of Pompano Beach by performing an organizational study of the Building Department. The scope of work involved the review of the structure, functions, policies, practices and procedures of the Building Department. The project was accomplished with review of written materials along with numerous staff interviews.

**City of Key West:** Organizational Study: Professional services performing an organizational study of the Building Department. The scope of work involved the review of the structure, functions, policies, practices and procedures of the Building Department. The project was accomplished with review of written materials along with numerous staff interviews.

**City of Bonita Springs:** Interim City Manager: Provided an on-site, full-time, city manager until the first city manager was hired.

**Bonita Springs Chamber of Commerce:** Community Services Assessment Study: Provided a two-phase Community Services Assessment Study for the Chamber of Commerce. Over 15 public meetings were held developing priorities, and questions for the survey with a 15 member Community Services Committee. Task one of the study involved evaluating what services were being provided in Bonita Springs and to whom. Services studied included roads, public transportation, bike paths, drainage and flood control, solid waste, parks and recreation, library, law enforcement, governmental services, EMS, street lighting, tax collection, property appraisal, youth and senior facilities and programs, and social services. In addition, the independent utilities along with other service providers, such as, fire protection, education, health care, postal service, cultural facilities, environmental protection, water resources protection, and mosquito control, were also evaluated. Task two of the study was an evaluation phase. Specifically, a survey instrument was created to assess the quality of those services provided and the priority of services needing improvements. The survey instrument distributed to a statistically valid sample of residents. Following analysis of the returned surveys, recommendations for service delivery additions, options, improvements, and changes were provided.

**Pinellas County:** Government Services Improvement Study: Senior Consultant for a comprehensive Government Services Improvement Study of the County government and 24 separate municipalities. The purpose of the study was to analyze current organizational structures, intra and inter-relationships between governmental units, the efficiencies and cost effectiveness of existing and proposed functional service area configurations, and to provide recommendations to the County Commission and the Pinellas County Charter Review Committee for potential cost savings and efficiencies. Served as the specialist for recommendations concerning duplication of building, zoning, code enforcement, and planning functions.

**Hillsborough County:** Performance Audit: Professional assistance in evaluating the Planning and Development Management Department of Hillsborough County. Specific focus was on the Growth Management and Policy Section. This study involved interviews, documentation of key issues impacting that department, analysis of operations, and recommendations for effective staff utilization and productivity, and future organizational realignments.

**Hillsborough County:** Evaluation Study of Public Agencies: Planning and Land Development Regulatory Services provided to Unincorporated Hillsborough County: Assisted in the preparation of a study for the Board of County Commissioners which reviewed and evaluated the roles and responsibilities of the County departments and agencies to determine if duplication of efforts existed. Report included recommendations for potential elimination of work tasks for the planning and land development regulatory departments. Departments and agencies reviewed included the following: Planning and Zoning Department, Development Review Department, Community Development Department, and the City-County Planning Commission.



### ***Strategic Planning/Vision Setting Project Experience***

**City of Ocoee:** Facilitated strategic planning sessions for development of strategic issues for the 2015 Strategic Plan, and the mission, vision, and value statements.

**City of Cape Coral:** Strategic planning assistance to the City in formulating the City's annual Strategic Plan. Assisted City Council in updating mission, vision, and value statements. Also, provided facilitation sessions for Police and Fire Departments when they developed their Department Strategic Plans.

**City of Gainesville:** Visioning assistance for the City's Department of Community Development. Conducted one a day session to develop the Department's Strategic Planning Goals and Objectives.

**City of North Bay Village:** Vision Setting: Facilitation assistance in the development of North Bay's Vision. Sessions included initial meetings with the Village Council and private citizens with follow-up meetings with the business community.

**State Attorney's Office Twentieth Judicial Circuit:** Strategic Planning Services: Services included meeting with key personnel to develop the mission and vision of the State Attorney's Office in meeting long and short range goals and objectives.

**G. Pierce Wood Memorial Hospital:** Strategic Plan Development: Services included revising and reviewing the mission statement, goals and vision of the Hospital. Meetings were held with supervisory staff to reinforce the process of strategic planning.

**Martin County:** Vision and Goal Setting: Professional facilitation assistance during a one and one-half day session to develop the goals and vision of the County. Services included receiving input from the County Administrator and Department Heads to determine current strengths and weaknesses and to come to a consensus regarding the goals and vision of the County.

**Village of Palm Springs:** Vision and Goal Setting: Development of the City's Vision and Goals. Services included meeting with the Village Manager, Village Council members, and Department Heads to receive input to determine the strengths and weaknesses of the Village, and to determine where they are, and where they want to be in the future.

**Hardee County:** Goal and Vision Setting: Strategic planning/facilitation assistance in the development of the County's vision, mission statement, and supporting goals. Input was received from the Board of County Commissioners, the County Manager, and Department Heads and staff. Through facilitation a consensus was reached and the vision, mission statement, and supporting goals were developed.

**City of Punta Gorda:** Goal and Vision Setting: Professional assistance for the City Council, City Manager and Department Heads. Tasks involved facilitation and developing consensus on priority issues.

**Florida Sterling Council:** Facilitated both a training session and a round table luncheon discussion during the 1996 Florida Sterling Council's Annual Awards program.

**Bonita Springs Utilities:** Strategic Planning: Facilitated 2 one day workshops with the Board of Directors and staff to formulate yearly goals and objectives, vision and mission statements.

**ECHO:** Strategic planning assistance to this non-profit organization devoted to world hunger. ECHO is located in North Fort Myers and specializes in growing hyponic fruits and vegetables which assist poor countries in producing their own food with limited water resources. In addition to the strategic planning assistance, Jim LaRue, served for many years on the Board of Directors of this organization.



### ***Fee Analysis Project Experience***

**El Portal:** Building Permit Analysis: Tasks involved surveying surrounding similar sized cities, comparison of the various fee structures, and analysis of the Village's existing fee structure and development of a revised fee schedule.

**North Bay Village:** Building Permit Analysis: Tasks involved surveying surrounding similar sized cities, comparison of the various fee structures, and analysis of the Village's existing fee structure and development of a revised fee schedule.

**Collier County:** Ambulance Billing Study: The scope of this study was to evaluate the efficiency and effectiveness of the Ambulance Billing Program in order to determine which changes, if any, would be necessary to provide services to the residents of the County, in the most effective and cost-efficient manner possible. The methodology of the study involved interviews with selected personnel, review of data, and a review of the current steps involved in the billing collection process. A final report was prepared which included recommendations for improvement in the billing system.

### ***Expert Witness***

**Grandview Palace Condo v. Atkinson Trust:** Expert Witness Land Use, 2012

**The School Board of Orange County, FL v Maurice C. Adams, et. al:** Expert Witness Land Use; 1999-2000

**Martin County v City of Stuart:** Annexation, 1997-1998

**City of Fort Myers v. Allied Recycling:** Expert Witness Land Use; 1996

**Williams v. Hendry County:** Expert Witness Land Use (Appeal); 1996

**Orange County v. Presbyterian Church of the Lakes, Inc. et. al:** Expert Witness Land Use; 1993  
Richard H. Adams, Jr.; Pleus, Adams, Davis & Spears, P.A., Orlando, FL

**Williams v. Hendry County:** Expert Witness Land Use; 1992

**Jerry Whitaker v. Town of Lake Placid:** July - September 1992  
Criminal zoning violation case (case was dismissed prior to my testimony);

**Waste-Tech Services, Inc. v. Madison County:** Expert Witness Land Use, 1992 - 1994

**Lehigh Acres Sun Bank v. Lee County:** Expert Witness Land Use 1987

**Yardarm v. the City of Pompano Beach, 1976 - 1979.**  
While Zoning Administrator for the City of Pompano Beach, expert witness for numerous cases.

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## Wm. F. Brisson, AICP

### Senior Planner

#### Areas of Expertise

Comprehensive Plan Amendments  
Evaluation and Appraisal Reports (EARs)  
Concurrency Management Systems  
Zoning and Land Development Regulations  
Market and Economic Analysis  
Water Supply Plans  
Debris Management Plans  
Floodplain Management Plans  
Reviews of Site Plans, Rezoning, Special Exceptions, Variances, etc.  
Expert Witness: Planning & Zoning

#### Education

Bachelor in Business Administration, University of Miami

#### Experience

LaRue Planning & Management, 2006 – present  
Brisson Planning Solutions, Inc.  
(formerly Adley, Brisson, Engman, Inc.)  
1971 – 2006, President

#### Professional Affiliations

American Institute of Certified Planners  
American Planning Association  
Association of Eminent Domain Professionals  
Florida Planning & Zoning Association

#### National APA Conference Presentations

Zoning for Timesharing and Short-Term Occupancy  
Impact Zoning Procedures

Mr. Brisson has been involved in community and comprehensive planning since 1971 and a principal member of LaRue Planning since 2006. He has prepared Comprehensive Plans and EARs under the 1985 Growth Management Legislation, as amended over the years, for over two dozen communities. Over the past thirty nine years he has specialized in housing and land use issues and in the preparation and amendment of zoning and land development codes and is proficient in the technical application of GIS.

Mr. Brisson has been accepted as an expert witness representing both public and private clients on zoning, planning, market and economic issues in eighteen land use and eminent domain cases in Circuit Courts throughout Florida.

#### Recent Professional Experience

**Holmes Beach:** Since 2004, prepared the City's updated and reformatted Unified Land Development Code and all subsequent amendments thereto and has prepared all of the City's amendments to its Comprehensive Plan. He has provided advice and assistance to the City Council in the review of complex or contentious development applications; prepared the City's most recent Evaluation and Appraisal Report and associated EAR-based Amendments; Public School Facilities Element; Water Supply Plan; Debris Management Plan; and Floodplain Management Plan.

**City of Okeechobee:** Currently the project director overseeing all amendments to the Land Development Regulations and Comprehensive Plan as well as review of development applications including site plans, rezonings, special exceptions, and variances. Prepared the City's Water Supply Plan and is in the final stages of completing the City's EAR-based Plan Amendments.

**North Bay Village:** Currently the project director for a major Land Development Code rewrite replacing two separate by conflicting Zoning Codes. Revisions include zoning district merges, sign code modifications and important changes to the supplemental regulation provisions. Adoption is scheduled for July, 2015.

**Town of Palm Beach:** Each year from 1979 through 2007, served as the Town's Planning and Zoning Consultant providing technical memoranda, testimony, and advice and assistance on a wide variety of planning and zoning matters to the Planning & Zoning Commission and Town Council. He assisted the Town in the preparation of and amendments to its Zoning and Land Development Codes and in the preparation of all of its Comprehensive Plans and amendments since 1975. As the Town's Planning Consultant he reviewed complex and contentious development applications, including special exceptions and site plans and issued technical memoranda and testimony in support of the recommendations. He has served as the Town's expert witness in five successful defenses to challenges in Circuit Court to its planning and zoning actions. He has been contacted by the Town to revisit and assess the continued appropriateness of the innovative "Town-Serving" regulation he developed 30 years ago and which has survived two legal challenges.

**Bonita Springs:** Prepared the City's first Comprehensive Plan adopted in 2002, which included development of the City's GIS mapping of the required Future Land Use and Transportation Map Series. He has been heavily involved in preparing the City's new updated and reformatted Land Development Regulations.



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## Benjamin Smith, AICP, LEED GA

### Senior Planner

#### Areas of Expertise

Zoning Review  
Land Development Code Revisions  
Comprehensive Plan Amendments  
Evaluation and Appraisal Analysis

#### Education

Bachelor of Science, University of Florida

#### Experience

LaRue Planning & Management, 2007 – present

#### Professional Affiliations

American Planning Association Member  
American Institute of Certified Planners  
Leadership in Energy and Environmental Design  
Green Associate

Ben joined LaRue Planning & Management in 2007, after receiving his Bachelor's Degree from the University of Florida. He has earned the designation of Leadership in Energy and Environmental Design Green Associate (LEED GA), as well as AICP certification. As an Associate Planner, he has become an active member of our development review team reviewing rezoning applications, site plans, and variances for many of our government clients; and presenting staff reports to local government elected bodies. He is also skilled in Comprehensive Plan amendments, as well as Land Development Code and CRA plan revisions. Ben has participated in drafting Smart Code regulations for various overlay districts which have become the core of several Community Plan Land Development Codes.

#### Representative Project Experience

**North Bay Village:** Responds to planning and zoning inquiries from the staff, residents, developers and contractors. Reviews applications for site plans, building permits, variances, and use exceptions. Attends public hearings to present staff reports.

**Bonita Springs:** Assisted in developing urban design and redevelopment streetscape strategies for the City in its Old US 41 Redevelopment Overlay Area.

**Glades County:** Assisted in preparation of the Evaluation and Appraisal report and associated Comprehensive Plan Amendments, which have been found sufficient by the state land planning agency.

**Indialantic:** Researched various zoning topics for Town Administration.

**Lee County:** Assisted in writing Land Development Regulations for the North Fort Myers Community Plan.

**Satellite Beach:** Assisted in completion of the Evaluation and Appraisal Report, EAR-based Plan Amendments, Public School Facilities Element, and the Water Supply Plan.

**Melbourne Beach:** Responded to planning and zoning inquiries from the staff, residents developers and contractors. Reviewed applications for site plans, building permits, variances, and use exceptions. Attended public hearings to present staff reports.



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## Mohsen Salehi, AICP, ITE (F)

### Senior Consultant

#### Areas of Expertise

*Infrastructure Planning*

*Transportation Planning*

*Traffic/Parking Studies*

*Urban Design*

*Downtown Redevelopment*

*Main Street Planning*

*Corridor Planning*

#### Education

*Master of City and Regional Planning, Clemson University*

*Bachelor of Architectural Engineering, Southern Polytechnic University*

#### Professional Affiliations

*Member of American Institute of Certified Planners (AICP)*

*Member of Fort Myers Chapter of American Public Works Association (APWA)*

*Member of American Society of Civil Engineers (ASCE) Transportation and Development Committee*

*Fellow of the Institute of Transportation Engineers (ITE)*

**Mohsen Salehi** has been a senior traffic consultant with LaRue Planning and Management Services, Inc. for the past fifteen (15). He specializes in transportation planning and traffic studies, participating in various tasks including major development reviews, redevelopment, visioning and urban design planning for our various city and county clients. Mohsen was responsible for transportation planning and traffic circulation for the City of Bonita Springs for a decade providing project management the City's traffic circulation study, and comprehensive planning for transportation and EAR based amendments. He was also instrumental in inter-modal transportation policy revisions for Boynton Beach when our firm was selected to provide assistance for their EAR-based Comprehensive Plan Amendments several years ago. He has been a member of the Florida Main Street Resource Team, and has served as a Transportation/Urban Design Consultant for the Program's participating communities.

#### Representative Project Experience

Transportation Consultant with LaRue Planning and Management Services, Inc. for the City of Bonita Springs, City of Okeechobee, Town of Davie, North Bay Village, Collier County, Lake Placid and Boynton Beach (2000-present)

Traffic Consultant for the City of Bonita Springs, managed the City's Traffic Circulation Study of 2008 and updated the City's Bikeways/Sidewalk Facilities Plan including costs and priority projects in 2010.

Transportation/Urban design Consultant for the Florida State Department's Main Street Program (50+) participating communities (2000-present), including presentations in Quarterly & Annual Meetings in Fort Pierce (1998) and Fort Walton Beach (2002), Stuart (2014), and St. Petersburg (2015), as well as participation in Resource Teams in Dania Beach, Clewiston, and Clearwater Beach in 1999 and Okeechobee Visioning in 2005.

Transportation Consultant for Greater Pine Island Civic Association Community Plan, Florida Planning and Zoning Association awarded this Plan its 2002 Certificate of Merit Award.

Transportation Consultant for the Fort Myers Beach Comprehensive Plan's transportation element including transportation demand management, traffic operations, land and water based public transportation 1997-1999 (Florida Planning and Zoning Association awarded this Plan its 1999 Outstanding Public Report Award).

Redevelopment Project Manager for Lee County responsible for Old 41 Redevelopment in Bonita Springs & East Lee County's Palm Beach Blvd Redevelopment areas (1995-97)

Lee County Planner assisted in developing the County Bicycle/Pedestrian Comprehensive Plan (1990-95).



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## James Leese

### Senior Consultant

#### Areas of Expertise

Architectural Illustration  
Planning  
Project Graphics  
Urban Design

#### Education

Arizona State University, College of  
Architecture  
University of New Mexico, College of Fine Arts  
University of Denver, College of Law  
Harvard University Graduate School of Design,  
continuing education program: Retail Planning  
and New Urbanism

James Leese brings a broad perspective of interests and talents to any project and provides specialized urban design and New Urbanism expertise for LaRue Planning. In his 40-plus years of practice he has been involved in a variety of development projects in both the public and private sectors. His experience includes urban design, planning, and architecture, specializing in urban mixed-use, residential apartments and loft condominiums, mixed-use parking garages in urban centers, and other urban core building types. Most recently Mr. Leese has taken up art and architectural illustration applying the professional knowledge and the many skills he has accumulated over the years. Presently, he is practicing as an architectural illustrator supporting the design professions.

#### Representative Project Experience

Urban Design Planner, Illustrator, LaRue Planning & Management, 2010

Provide New Urbanism design standards and illustrations for two community planning areas (Page Park and North Fort Myers) in Lee County.

Principal, City Design & Graphics, Fort Myers, Florida 2008

Provide project graphics and illustrations for planners, urban designers, and architects, as well as consulting services to same and others, including governmental entities.\*

Manager of Design, R. J. McCormack Architect, Inc., Fort Myers, Florida 2004 - 2008

At RJMA, he was planner-designer for several projects, including the Times Square Redevelopment project on Fort Myers Beach, Paradise Preserve in North Fort Myers (a mixed-use community on the site of the Lochmoor Country Club), and Red Fish Key Condos in Englewood, as well as several others.

Principal, City Design, Kansas City, Missouri 2002 - 2004

Served as a consultant to developers and quasi-governmental groups in visualizing development opportunities.

Principal, Shears & Leese Architects, Inc., Denver, Colorado 1988 - 2002

With business partner Chris Shears he specialized in the planning and design of large mixed-use, urban projects in dense urban areas for a number of years.

Principal, Architecture Four Collaborative PC, Boulder, Colorado 1984 - 1988

Five architects left a Boulder firm (now Downing, Thorpe, and James) to start Architecture Four Collaborative, until divergent interests led two of the four into different directions. The other two went on to become Shears & Leese Architects.

\* NOTE: Recent work with LaRue Planning and Management of Fort Myers, Florida has resulted in praise from MuniCode for graphic clarity and quality.



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## John Bry

### Senior Consultant

#### Areas of Expertise

Housing and Historic Preservation

#### Education

Masters of Science, Historic Preservation  
Ball State University

Bachelor of Science, Historic Preservation  
Southeast Missouri State University

#### Experience

Madden Consulting, LLC  
Owner, January 1998 – Present

Lee County, Florida  
Intern, August 2014 – July 2015

Executive Director of Community Asset and  
Development and Convention and Visitors  
Bureau, Noble County, Indiana  
December 2009 – August 2014

Olmsted Parks Conservancy, Buffalo, NY  
Director of Operations  
September 2008 – May 2009

Pennsylvania Downtown Center, Harrisburg,  
Eastern Program Coordinator  
April 2005 – June 2007

Main Street Urbana, Urbana, Ohio  
Executive Director, April 2000 – March 2004

Main Street Columbus, Columbus, Ohio  
Executive Director, March 1988 – March 2000

Flora Community Development Corporation  
Flora, Illinois  
Executive Director, March 1995 – March 1998

John is an organized, energetic, passionate, dedicated and creative community revitalization professional with diverse management and educational background including 20 years experience in executive director management of non-profit and community redevelopment organizations. Special emphasis on grant writing, organizational planning, program development and implementation, marketing, fundraising, small business development, community development, and economic development financing strategies.

#### Representative Project Experience

Planning Intern with Lee County, Florida provided project management support and implementation related to development matters of historic structures throughout Lee County. Responsibilities include strategic development of specific Historic Preservation projects, and issuance of Certificates of Appropriateness as required.

Compilation of property information, field survey, and designation reports of the Tice area in Lee County for designation as a Lee County Historic District containing over 900 structures. Once completed, the Tice Area could be the largest locally designated historic district in Lee County and clear the way for additional funding opportunities for revitalization and development ranging from Historic Tax Credits to grant funding. Regulatory relief could also be granted for historic structures no longer in compliance with current building and zoning codes.

Compilation of maintenance plan for historic Koreshan Cemetery in Estero. This small cemetery was acquired by a private developer and under the zoning agreement with the county a maintenance plan for the property was completed.

Compilation of Roberts Building and Russell Park Civic Association Building designation reports for historic listing by the Lee County Historic Preservation Board. With cooperation of the property owners, these two structures dating from the early 1950s will be officially recognized as Lee County landmarks that will clear the way for additional funding support from the county to become available for renovation and repairs.

Compilation of draft Historic Landmark Designation Reports for Morse Shores, Alabama Grove, and the Russell Park districts.

Provide technical assistance to the Alva Library Museum concerning fundraising strategies and organizational capacity.

Provide technical assistance to residential property owners for the submittal of applications for the Lee County Historic Preservation Grant Program.

Owner of Madden Consulting Since 1998, assisted private non-profit organizations and local governments address community revitalization needs on a periodical basis. Efforts have included organizational workplan development, grant writing, and organizational training.

Securement of a \$50,000 Specialty Grant for the City of Arcadia, Florida for a building assessment and plan for former city hall structure.



# Project Experience



**LaRue** Planning  
& Management Services, Inc.

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Serving Florida Local Governments Since 1988

# City of Bonita Springs

## Planning & Zoning Contract Services

### Client Contact:

Bonita Springs, Florida  
Gary Price, Former City Manager  
239.980.9400

### Team Member(s):

James G. LaRue, AICP  
Bill Brisson, AICP  
Sandra Ramseth, AICP  
Ladaysha King  
Benjamin Smith, AICP, LEED GA



Since its incorporation until 2010, the City of Bonita Springs contracted with LaRue Planning & Management Services to act as its Comprehensive Planning team. We coordinated preparation of the City's first Comprehensive Plan by serving as the staff liaison with the Local Planning Agency and provided oversight of the City's consultant which prepared the Comprehensive Plan. In addition, we provided visioning and goal setting sessions for the Comprehensive Plan. We facilitated two city-wide and six neighborhood visioning sessions. Services included presentation of visual representation of various types of land use within the City of Bonita Springs and how this correlates to the different elements of the Comprehensive Plan. Presentations were customized to the individual neighborhood planning sectors within the City. Public comments were received relating to how citizens viewed the City of Bonita Springs then, and how they visualized the City ten years later. Citizens also provided specific comments for major issues relating to the elements of the Comprehensive Plan. We summarized all comments for possible inclusion in the City's Goals, Objectives, and Policies of the Comprehensive Plan, where appropriate.

We also conducted a two-phase Community Services Assessment Study for the Chamber of Commerce of Bonita Springs prior to Bonita Springs becoming a City. Over 15 public meetings were held developing priorities and questions for the survey with a 15

member Community Services Committee. Services studied included roads, public transportation, bike paths, drainage and flood control, solid waste, parks and recreation, library, law enforcement, governmental services, EMS, street lighting, tax collection, property appraisal, youth and senior facilities and programs, and social services. In addition, the independent utilities along with other service providers, such as, fire protection, education, health care, postal service, cultural facilities, environmental protection, water resources protection, and mosquito control, were also evaluated. Phase two of the study was an evaluation phase. Following an analysis of returned surveys, recommendations for service delivery additions, options, improvements, and changes were provided.

In 2005, we prepared the City's first Evaluation and Appraisal Report (EAR) and the subsequent EAR-based Amendments which were found in compliance by the Department of Community Affairs. Other planning services have included the creation of a Public School Facilities Element and Water Supply Plan. We have prepared many staff reports for presentation to City Council for issues ranging from site development and variances to large scale Future Land Use Map Amendments. We were responsible for creation of the City's first Land Development Code, including major revisions to the regulations governing the "old 41" redevelopment area.



# The City of Marco Island Zoning Review

## Client Contact:

Marco Island, Florida  
Tami Scott  
Zoning Administrator  
239.389.5021  
Email: [tscott@cityofmarcoisland.com](mailto:tscott@cityofmarcoisland.com)

## Team Member(s):

James G. LaRue, AICP  
Bill Brisson, AICP  
Benjamin Smith, AICP, LEED GA

Island Plaza Planned Unit Development

Represented by: Hole Montes



LaRue Planning & Management Services was contracted by the City of Marco Island as a special land use consultant to review a PUD zoning application for a commercial mixed-use shopping center (Island Plaza PUD). Tasks involve review and analysis of the petitioner's application. Recommendations for zoning approval or denial are to be provided to the City Planning Board as well as the City Council. The assignment requires interpretation of specific comprehensive plan policies and numerous zoning and Land Development Regulations.

This project requires excellent communication skills, as we interact with staff and the applicant. A separate but related task involved writing a zoning interpretation letter, clarifying whether the C-4 commercial zoning district regulations prohibit storage uses. The interpretation letter required substantial data and analysis in support of the specific recommendations. This entire project is ongoing and is on schedule to be completed prior to December 2015.



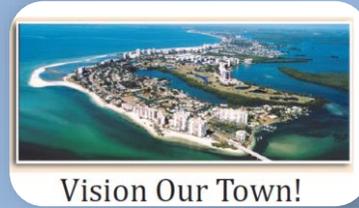
# *The Town of Fort Myers Beach Comprehensive Plan Evaluation*

## **Client Contact:**

Fort Myers Beach, Florida  
Matt Noble  
Principal Planner  
239.765.0202  
Email: matt@fortmyersbeachfl.gov

## **Team Member(s):**

James G. LaRue, AICP  
Bill Brisson, AICP  
Sandra Ramseth, AICP  
James Leese, AIA, CNU, ASAI  
Benjamin Smith, AICP, LEED GA



The Town of Fort Myers Beach initiated the evaluation and update of its Comprehensive Plan with a community participative process called "Vision Our Town". The Town staff prepared questionnaires seeking opinions of businesses and residents on current and future issues facing the Town. LaRue Planning & Management Services Inc., was selected to assist the Town in its efforts. Consistent with the "Vision Our Town" theme, the visioning process was employed to obtain public input with regard to picturing a Fort Myers Beach that would be most desirable in years to come.

The LaRue team and Town staff hosted two vision sessions to ascertain what the residents thought were the major challenges that would need to be met in order to ensure a thriving and successful Fort Myers Beach. The first vision session sought to determine the essential issues that would become the "building blocks" for a viable Fort Myers Beach. Specifically, participants at the first session were asked to identify those major issues they considered sufficiently important to the short-range and long-range future of the Town.

At the second vision session, 67 statements describing potentially desirable outcomes covering four major subject areas were presented to the participants. The subject areas included issues related to transportation, community character, natural resources, and infrastructure. Each of the 67 outcome statements were derived from a variety of sources including:

- input during the first visioning session;
- the results of responses to a questionnaire posted on the Town's website;
- citizen and property owner comments; and
- staff knowledge of local issues.

Participants in the vision session were asked whether or not they agreed or disagreed with each of the vision outcome statements.

Based on the consensus reached during the Vision Our Town project, and particularly at the evaluation of the outcome statements LaRue Planning recommended specific changes to the Objectives and Policies in the Comprehensive Plan. These revisions were presented to the Town Council and became the starting point for the Town's future update of its Comprehensive Plan.



# *The City of Cape Coral* *Strategic Planning*

## **Client Contact:**

Cape Coral, Florida  
John Szerlag, City Manager  
239.574.0446

## **Team Member(s):**

James G. LaRue, AICP



LaRue Planning & Management was hired by the City of Cape Coral in December 2011 to assist the City in establishing their 2012-2013 strategic plan objectives. Jim LaRue facilitated strategic planning sessions, with the Mayor, City Council and Department Directors. The significance and importance of this process has been confirmed; as the Mayor and City Council utilized the resulting plan to foster and nurture a successful City for staff, policy makers and residents.

We reaffirmed the City's commitment to Strategic Planning as a "change agent" process and held several facilitation sessions that, in addition to developing strategic planning objectives, looked at the City's Mission, Vision, and Values. We also examined the possible internal-external factors that affect local governments when initiating and accomplishing strategic planning objectives.

City Council agreed upon four strategic areas and discussed how progress could be measured over time as the City strived for excellence in these key strategic areas. As a follow-up to the strategic planning public forums our firm helped the City staff in formulating specific initiatives to accomplish the adopted City strategic issues, along with performance measurement objectives.

The strategic planning sessions were a positive step in the City's efforts to put strategic planning to work in creating an effective and efficient municipality. Since the adoption of the City's Strategic Plan, LaRue Planning has assisted both the Fire and Police Departments in developing their own strategic plans. The City's 2015-2018 Strategic Plan update is still consistent with the original strategic plan foundation.



# North Bay Village Planning & Zoning Contract Services

## Client Contact:

North Bay Village, Florida  
Yvonne Hamilton, Village Clerk  
305.756.7171

## Team Member(s):

James G. LaRue, AICP  
Bill Brisson, AICP  
Benjamin Smith, AICP, LEED GA



LaRue Planning & Management Services, Inc., has performed planning services for North Bay Village since 1998. Our extensive services range from development review to comprehensive planning. In addition, we have performed management studies which resulted in the Village revising its Land Development Code Building Permit fees.

Many planning and zoning issues have been tackled successfully including preparing two Evaluation and Appraisal Reports for the Village (1998 and 2005). We successfully created the Public School Facilities Element and Water Supply Plan based on Florida legislation and facilitated numerous visioning and goal setting sessions. All planning amendments completed for North Bay Village have resulted in compliance findings by the State Land Planning Agency. Additionally both Evaluation and Appraisal Reports were found sufficient.

LaRue Planning serves as the Village Planning and Zoning Official and is responsible for the interpretation, and enforcement of general code administration, comprehensive planning, subdivision regulation, zoning regulation, and due process, as set forth in the Land Development Code. Over the past year our services have been focused on development and site plan review due to an increase in new development projects within the Village. In addition, LaRue Planning is producing a unified set of land development regulations where two separate sets of regulations now exist. This comprehensive Land Development Code rewrite is scheduled for adoption in 2015.



# Lee County – North Fort Myers Land Development Code

## Client Contact:

Lee County, Florida  
North Fort Myers Design Review Panel  
Wayne Daltry  
239. 898.5147

## Team Member(s):

James G. LaRue, AICP  
Bill Brisson, AICP  
Sandra Ramseth, AICP  
James Leese, AIA, CNU, ASAI  
Benjamin Smith, AICP, LEED GA



Town Centers  
Neighborhood Centers  
Commercial Corridors



LaRue Planning & Management was selected in 2009 to implement the Community Plan of North Fort Myers by writing specific Land Development regulations for the Town Center, Neighborhood Center and Corridor Overlays. The Community Plan was created from a community driven Vision Plan. Code provisions were developed to incentivize existing uses to comply with the proposed overlay regulations including specific architectural standards for this diverse Lee County community of over 50,000 people.

With walkability and pedestrian access as two of the stated goals in the building of compact communities, the regulations for the Neighborhood Centers and Corridor Overlays embrace Smart Growth principles. Their emphasis is on the scale and intensity of

development using qualitative design principles rather than the quantitative results of traditional zoning approaches.

LaRue Planning completed the first phase of this project (Community-Wide, Neighborhood and Commercial Corridor development regulations) in July 2010. Our firm completed work on the last phase of this project, Form-Based development regulations for the "Town Center", which was adopted in 2013. Development Regulations were designed specifically for the Town Center area between U.S. 41 and Business U.S. 41. These regulations are unique for this area in that Form-Based Code regulations are more focused on urban redevelopment than the conventional use-based zoning approach.



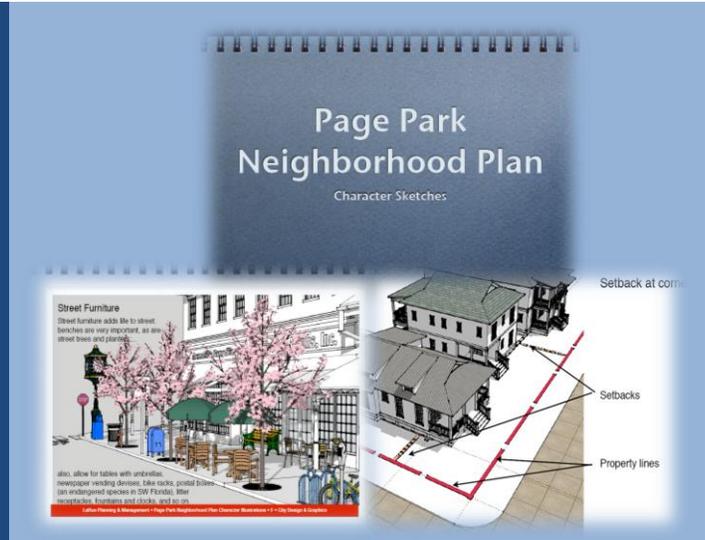
# Lee County – Page Park Land Development Code

## Client Contact:

Lee County, Florida  
Page Park Planning Panel  
John Sibley, President  
239.671.9663

## Team Member(s):

James G. LaRue, AICP  
Sandra Ramseth, AICP  
James Leese, AIA, CNU, ASAI  
Benjamin Smith, AICP, LEED GA



Lee County and the Page Park Planning Panel selected LaRue Planning & Management to write the regulations within the Lee County Land Development Code implementing the Page Park Community Vision Plan policies. This project began in 2009 and resulted in four community forums and numerous staff meetings formulating practical mixed-use oriented regulations for this small but active neighborhood.

The Page Park Overlay District regulations promote the development of a pedestrian-oriented mixed-use district in which a variety of complementary retail, commercial, office, civic, and residential uses are allowed. The regulations emphasize innovative, traditional

neighborhood development, reduction of sprawl and discouragement of businesses that would disrupt the pedestrian environment. Many illustrations have been included with the regulations demonstrating desirable architectural design models.

Throughout the duration of the project, consideration was given to the interests of all parties involved; including the community, the County, potential developers and a neighboring airfield. This project was completed in July 2010 and adopted in August by the Board of County Commissioners.



# *City of South Miami CRA Madison Square Mixed Use Development Project Land Assembly Analysis*

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## **Client Contact:**

City of South Miami, Florida  
Community Redevelopment Agency  
Stephen David, CRA Director  
305.668.7238

## **Team Member(s):**

James G. LaRue, AICP  
Sandra Ramseth, AICP  
Sharon Jenkins-Owen, AICP  
Tim K. Tripp, AIA



The South Miami Community Redevelopment Agency (SMCRA) retained LaRue Planning and Management Services, Inc. to analyze the highest and best use for the Madison Square Mixed Use assembled parcels focusing on the overall compatibility and intensity of the proposed project. The analysis was a realistic assessment to consider the current needs of the neighborhood and determine the most appropriate size of a development in terms of scale, building height, residential density, floor area ratio and future affordability of the units and most importantly the financial feasibility of the project for any future developer. Once the highest and best use was determined, the analysis included regulatory strategies to achieve the new Vision.

The Madison Square Study analyzed 1.92 acres that were owned or being considered for acquisition by the South Miami Community Redevelopment Agency (SMCRA). The lots are located within the Community Redevelopment Area (CRA) boundaries. The desired project, as currently envisioned, will include mixed-use commercial and affordable housing land uses.

The SMCRA was challenged with a community plan that was designed when the market was booming and there was a great need for housing and services. Funding such an effort under current economic times became questionable. Also questionable was whether the plan with the higher densities would be sustainable and successful in the current economic climate.

The analysis provided a numerical count of the proposed residential units in terms of unit size (one-bedroom; two bedroom, etc.) and cost. Also, given the current economic conditions, a consideration of the most effective future marketing strategy of the units was given. It determined the most appropriate regulatory strategy for the City of South Miami to restrict utilization of the newly created land-use designation which was intended for exclusive use in the officially designated Community Redevelopment District of the City.

The analysis included a community workshop to ascertain the neighborhood service demands as well as continued coordination with the SMCRA. The workshop provided the community an avenue to input on development and design within their neighborhood. As a result it fostered cooperation between the CRA, the City of South Miami and the community. Engaging the community was both educational and allowed the community's participation in planning and zoning.

The Land Assembly Analysis combines a thorough research of the regulations, existing conditions, added to community input with a market pro-forma. The information was then combined and blended into a number of design considerations to ensure that the project would be compatible with the neighborhood and fulfill a portion of the missing service demands needed to enhance the residents' quality of life.



# *City of Okeechobee*

## *Planning & Zoning Contract Services*

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### **Client Contact:**

City of Okeechobee, Florida  
John Cook, Interim City Administrator  
863.763.3372

### **Team Member(s):**

James G. LaRue, AICP  
Bill Brisson, AICP  
Benjamin Smith, AICP, LEED GA



LaRue Planning & Management Services, Inc. has served as the Planning and Zoning Official for the City of Okeechobee since 1997, providing complete planning, zoning and development review services. Our firm has completed complex tasks which include comprehensive planning, review of all zoning, development applications, plats and site plans, preparation of Comprehensive Plan Amendments, and other long-range planning projects, as assigned.

We attend monthly Planning/Zoning Board, Technical Review Committee and City Council meetings to provide advice and assistance on particular development applications and changes to the Comprehensive Plan and Land Development Code. We act as the City's representative for all zoning and site plan inquiries and regularly prepare clear and concise staff reports that are fully accepted by the applicants and the governing body.

In our capacity as the Planning and Zoning Official, we have written and revised Land Development Regulations for Zoning Districts, Sign Regulations and concurrency implementation.

LaRue Planning has also assisted the City in establishing equitable fees for our services in the form of pass-through costs to applicants when appropriate.



# *The City of Casselberry*

## *EAR-based Plan Amendments*

### **Client Contact:**

Casselberry, Florida  
Barbara Lipscomb, City Manager  
Sandra Smith, City Planner  
407.262.7700

### **Team Member(s):**

James G. LaRue, AICP  
Bill Brisson, AICP  
Sandra Ramseth, AICP  
Benjamin Smith, AICP, LEED GA



The City of Casselberry contracted with LaRue Planning & Management to prepare the EAR-based Comprehensive Plan Amendments in 2008. This project was unique in that it required extensive updates to the Data and Analysis of the Plan that had not been done in years. The Comprehensive Plan was also converted into a single Policy document. The Data and Analysis update became the support document that is now more frequently used by City staff without having to be updated only by a Comprehensive Plan Amendment.

There were six major issues:

1. Recreation and social services;
2. Redevelopment;
3. Urban Design;
4. Workforce housing;
5. Transportation; and
6. Public safety.

There were extensive policy changes to implement the EAR recommendations as well as substantive alterations from the original EAR adoption.

In addition to implementing the EAR major issues into Comprehensive Plan policy revisions, major Plan changes had to be made to be found in compliance with Growth Management Legislation regarding House Bill 697 (Greenhouse Emissions Reduction), Public School Facilities Element updates and the financial feasibility of the Capital Improvements Element. The EAR-based Plan Amendment was adopted in 2009 and found in compliance by the Florida Department of Community Affairs (DCA) during that same year.



# **RFQ #2015-01**

## **VILLAGE OF ESTERO, FLORIDA**

**Request for Qualifications for General Planning Services for  
the Village's Community Development Department**

**Turrell, Hall & Associates, Inc.**

**3584 Exchange Avenue**

**Naples, FL 34104**

**O: (239) 643-0166**

**F: (239) 643-6632**

**[www.Turrell-Associates.com](http://www.Turrell-Associates.com)**



# TURRELL, HALL & ASSOCIATES, INC.

MARINE & ENVIRONMENTAL CONSULTING

3584 Exchange Avenue, Suite B • Naples, Florida 34104-3732 • (239) 643-0166 • Fax 643-6632 • thall@turrell-associates.com

August 4, 2015

The Village of Estero  
Attn: Mr. Peter G. Lombardi, Village Manager  
21500 Three Oaks Parkway  
Estero, FL 33928

**Re: Request for Qualification #2015-01  
Village of Estero, Florida Request for Qualifications for General Planning  
Services for the Village's Community Development Department**

Dear Mr. Lombardi:

Turrell, Hall & Associates, Inc. is pleased to provide you with this package of information detailing our qualifications to assist the Village of Estero with future Planning needs. Our firm has been providing specialized professional consulting services in environmental and marine science and engineering for over 25 years. Established in 1989, Turrell, hall & Associates (THA) is based in Naples, and works throughout the State and The Bahamas, primarily. We are particularly interested in the Environmental Review and Enforcement needs described within RFQ #2015-1.

Our firm has permitted numerous private projects through various levels of municipal government and has also assisted municipalities with their own permitting needs throughout Southwest Florida, which provides us with the understanding of comprehensive plans, the zoning process, and development orders you will need to provide these services to Village residents, developers and/or associations.

Each member of our staff has a particular expertise such as wetland determinations, mitigation monitoring, wildlife studies and analyses, marine and wetland permitting, construction planning and drawings, bid document preparation and bidding, protected species surveying, protected species permitting and relocation, environmental construction oversight, permit compliance oversight and reporting, Coastal Construction Control Line permitting (CCCL), educational plans and signage, habitat and species management plans, habitat creation plans, mitigation planning and permitting, and water quality monitoring.

Some examples of our current municipal work include:

- **Clam Bay Natural Resource Protection Area (NRPA) Environmental Management**  
Turrell, Hall & Associates, Inc. has been the lead consultant in the team assembled to help restore the mangroves and seagrasses within the Clam Bay estuary since 1998. Our continuing services include:
  - Annual oversight of 500 acres of mangrove and estuarine habitat
  - Education materials and signage for Pelican Bay community and tram trails along Clam Bay
  - Canoe trail marker permitting and maintenance through the estuary

- Environmental monitoring and construction oversight for Clam Pass and Clam Bay channel dredging
  - Creation of Clam Bay Ecosystem Management Plan
  - Applying for and processing of new 10-Year Clam Bay Management Permits
  - Annual monitoring of benthic and natural resources
  - Water quality data input and analysis
- **Picayune Strand Restoration CERP Project Environmental Management**

This CERP project consists of spoil and road removal, canal plugging, and construction of the pump stations, and associated features which will help restore habitats in Picayune Strand State Forest to pre-development conditions. Turrell, Hall worked with the U. S. Fish & Wildlife Service, the Army Corps of Engineers, and the contractors to develop Environmental Protection Plans for the various project phases. THA coordinates with the contractor to ensure all aspects of work remain compliant with environmental permitting and the biological opinion. THA also created listed species educational programs, pamphlets, posters and a video which are required to be reviewed before any visitors or personnel can enter the project site. We are also currently providing the Environmental Impact Assessment for blasting activities associated with a new manatee feature in Port of the Islands associated with this permit and conducting daily wildlife and/or nest surveys to delineate protective buffer zones during construction.
  - **Naples Pier Restoration Sea Turtle Monitoring**

Working under the contractor rehabilitating the Naples Pier this summer, THA is providing daily, early morning sea turtle nest surveying within the permitted parameters for the construction and construction staging. Following each early morning survey reports are submitted to the appropriate agencies on the findings and any new nest locations are marked and coordinated with the contractor.
  - **Naples City Dock Fuel Dock Rehabilitation and Future Dock Renovations**

Turrell, Hall & Associates was hired by the City of Naples to create plan for replacing the current dilapidated fuel dock at the City Dock on Naples Bay and prepare construction estimates needed for approval by City Council. Once approved we will permit the new design with state and federal agencies, while providing modifications as needed to the current Sovereign Submerged Lands Lease at the City Dock upon permit issuance. Construction plans, bid document preparation and bidding assistance will also be provided by our staff under this Purchase Order.

We are also working with the City to come up with a plan and estimates to rehab the entire dock system and Dockmaster facility in phases since the entire structure is showing signs of age and is reaching the limit of patch-type repairs.
  - **Submerged Resource Surveys for Doctor's Pass Jetty Rehabilitation (Naples) and Big Carlos Pass Dredging and Beach Renourishment (Bonita Springs)**

Turrell, Hall & Associates staff performs dozens of submerged resource surveys each year and most recently (2015) performed surveys for jetty rehabilitation at Doctor's Pass in Naples and in Big Carlos Pass for maintenance dredging and beach renourishment permits. A relocation plan was also prepared for the Department of Environmental Protection to relocate some cup corals which were found to be living amongst the jetty rocks in Doctor's Pass.

Based on our experience we feel we are qualified to provide the environmental services outlined in RFQ #2015-1 and other services which will no doubt arise as the Village begins to process more applications.

Please feel free to contact the following references if you have any questions about our services and commitment to our clients.

**City of Naples- Capt. Roger Jacobsen (Harbor Master and Code Enforcement)**

735 8<sup>th</sup> Street South, Naples, FL 34102-5882

(239) 213-5030

[rjacobsen@naplesgov.com](mailto:rjacobsen@naplesgov.com)

**Pelican Bay Services Division (of Collier County) - Neil Dorrill (PBSD Administrator)**

Dorrill Management Group

5672 Strand Court, Suite 1, Naples, FL 34110

(239) 592-9115

[neil@dmgfl.com](mailto:neil@dmgfl.com)

Thank you for your consideration and please feel free to call or email us with questions.

Sincerely,

A handwritten signature in blue ink, appearing to read 'TH' followed by a stylized name.

Timothy Hall, Vice President  
Turrell, Hall & Associates, Inc.

**QUALIFICATIONS BASED ON RFQ #2015-1  
DESCRIPTION**

## **INFORMATION RELEVANT TO ENVIRONMENTAL REVIEW & ENFORCEMENT**

*Environmental Review of comprehensive plan amendments, rezoning applications, special exceptions, and development orders, including reviewing protected species surveys and management plans associated with large projects. Also includes Certificate of Compliance reviews for landscaping, preserved vegetation, stormwater pond plantings, invasive exotic plan removal, management plans, and open space requirements related to development orders.*

Turrell, Hall & Associates staff are well versed in local environmental review processes, amendments to codes and comprehensive plans, and variances from the approved codes. Not only do we process a wide variety of projects and approval types with local governments, we also take part in stakeholder groups for various amendment changes in Collier County offering suggestions to refine rules and make them clearer for interpretation by both government staff and consultants.

Frequently because of the environmentally sensitive areas where our projects lie (islands, bays, special treatment (ST) areas, coastal construction line zones, aquatic preserves, etc.) we have to process multiple different types of permits for one project. In some cases this requires special hearings for variances and dock extensions. Because of the sensitive habitats listed species surveying is always a requirement and frequently listed species and/or habitat management plans are also needed to guide the developer through construction and into operations. In habitat or preserve management plans landscape and planting recommendations are made with buffers to protect native habitats. A planting plan might consist of vegetation sizing, spacing, species, numbers and costs associated with plant purchase and installation.

Littoral planting plans should include elevation changes and species specific to those elevations to provide both habitat and ensure survivorship of the plantings. We recently created a 5-acre woodstork foraging habitat at Esplanade Golf & Country Club, which is located at the southwest corner of the Corkscrew Watershed. In the plan we utilized undulating elevations with different plantings at each depth so that as the water table drops, there will always be habitat for fish and foraging areas for resident wood storks. (See attached project sheet on Esplanade)

THA has staff specializing in permit compliance oversight and monitoring. Services under compliance might include wetland mitigation monitoring and reporting, coordination of exotic removal activities and oversight, exotic removal bidding, project permit compliance review and inspections, permit compliance documentation submittal to various agencies, modification of schedules and permits as needed, modifications to Sovereign Submerged Lands Leases and Lease inspections.

### ***Review and approval of Vegetation Permits.***

***Vegetation Removal Permits for existing trees in common areas of development that are deemed to pose a safety hazard to pedestrian or vehicular traffic or existing buildings or structures; diseased trees which are a hazard; or trees weakened by natural causes as specified in the LDC. To be completed in 7-10 business days.***

THA processes Vegetation Removal Permits for residents regularly with the various municipalities and at times authorization with the South Florida Water Management District if the tree lies on the inner edge of a preserve, but is potentially endangering a home or pool cage. Permitting involves species, numbers, reasoning for necessity, method of removal, disposal plans, evidence of property ownership, owner/agent affidavit, and aerial drawings.

***Notices of Clearing- staff conducts a survey for protected species, prepares a document to send to the Clerk of Courts for recording, as required by the LDC and Administrative code. To be completed within 30-45 days.***

When site clearing is expected, then protected species surveys must be done onsite ensuring the safety of any nests and listed species. Fox Squirrel nest surveys are the most common prior to construction and are usually required by permit special condition. Once the site has been inspected and no evidence of listed species presence or utilization is found then the site clearing can commence and paperwork to that effect is filed with the permitting wildlife agencies. This survey is part of the permit compliance services THA offers during construction activities.

If a species is present then either the species has to be allowed to leave the site of its own accord (depending on the species), has to be relocated offsite (by permit), or in the case of certain nesting species like osprey, a permit is required to remove a nest once any chicks have fledged.

***Exotic Removal- inspection and provision of courtesy letter confirming the presence of exotic species on property and recommending methods of removal to avoid damaging existing native vegetation.***

Identification of non-native and nuisance vegetation first requires expert knowledge of desirable local flora. It also requires the need for experience with a long list of Category I and II listed exotic and nuisance species, as identified by the Florida Exotic Plant Pest Council, in terms of identification and the best means of eradication. Our permit compliance specialist has 17 years of plant identification and monitoring experience, working daily with exotic removers on species that need to be killed or removed and methodology for that removal. Exotic species removal can be accomplished by hand pulling, cutting and spraying the stumps, foliar spraying over a large area of infestation, killing in-place by girdling and treating the girdle with herbicide, cutting and stacking, or cutting and removal offsite. The methodology is typically outlined in a pre-prepared vegetation management plan, but if not the surround natural environment would dictate the best method for preventing damage to adjacent desirable vegetation.

***Compliance and Enforcement- inspections of development sites to ensure ongoing compliance with environmental regulations and development approvals and identify environmentally-related code violations. Initial inspection 1-2 days from receipt of compliant, Notice of Violation sent within 8 business days of inspection, participation in Enforcement Hearing.***

Specialized compliance staff at THA follow a project's permit/development conditions from issuance to final release (sometimes years later). This work involves site inspections,

coordination with developers and/or associations, coordination with vegetation maintenance and removal companies, coordination with regulatory compliance personnel, assistance with remedies to violations or problems, and verification that violations have been remedied.

Common compliance issues include silt fence maintenance failure, accidental impacts to preserve areas by construction equipment, yard maintenance crews depositing trimmings in dedicated preserves, preserve buffer zones being landscaped by overeager residences, neighborhood required vegetation (by deed restriction) be removed and replaced with a non-native species, and construction debris blowing into stormwater lakes and littoral areas needing to be removed.

Documentation, notification and follow-up typically resolve the majority of these issues.

***Dock and Shoreline Structures Permitting and Inspection. Initial review/revision review within 1 business day of submittal, final inspection within 1 business day of notification.***

Turrell, Hall & Associates has an Ocean Engineer, an Ocean Engineer (EIT), marine permitting specialists and a former permit reviewer from the FDEP who issued many of the permits which we processed for the last decade. Additionally we have four ex-marine contractors in-house who help with our marine plans, specifications, bid documents, contract review and construction oversight. Typical marine structures we design and permit are basins, dredge plans, docks (single family, multi-family and commercial), bulkheads/seawalls, rip rap revetment, boat lifts, dry storage facilities, jetties and travel lifts.



Our construction specialists visit our jobsites daily for compliance inspections (as seen to the right) and to clarify and answer questions regarding the permit, plans or contracts. They also process pay requests for the client.

***Staffing of Eagle Technical Advisory Committee, maintenance of Bald Eagle data.***

Tim Hall, Senior Ecologist and Vice President of THA, is a well known and respected wildlife ecologist in the State of Florida. Under Tim is a staff of experienced Biologists who assist with Bald Eagle monitoring prior to, during and after construction, and eagle nest permitting required for construction near active nests. We also provide nest survey reports to the wildlife agencies during construction and determine the construction phasing and means that can be utilized during various times of the year in the form of a Bald Eagle Management Plan. This plan is vetted with the wildlife agencies prior to becoming a permit requirement.



TURRELL, HALL & ASSOCIATES, INC.  
RESUMES

**TIM HALL- Vice President**  
**TURRELL, HALL & ASSOCIATES, INC.**

3584 Exchange Avenue, Naples, Florida 34104 • Office : (239) 643-0166 • THall@turrell-associates.com

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Tim Hall is a Principal at Turrell, Hall & Associates, Inc., and is also the Senior Ecologist for the firm. Tim works closely with federal, state, and local agencies to obtain approvals for a number of marina and residential development projects. His field skills include plant and animal species identification, habitat assessments, wetland delineations, wildlife surveys, and wetland restoration.

**EDUCATION & LICENSES**

Baccalaureate Studies: Wildlife Ecology  
University of Florida, 1986-1989

Masters Studies: Wildlife Ecology & Wetland Ecosystems  
University of Florida, 1990-1991

Continuing Education

- 2014 Presented Paper at National Conference on Beach Preservation to Florida Shore & Beach Preservation Association (FSBPA), "Clam Bay; A Mangrove Restoration Success Story."
- 2008 University of Florida- FDEP SOP Sampling Training for Groundwater, Surface Water and Wastewater
- 2006 Florida Green Industries Best Management Practices Course
- 2005 Florida Chamber's- Florida Uniform Mitigation Assessment Method Class
- 2005 The Florida Chamber's- Growth Management and Environmental Permitting Short Course
- 2003 Completed the Department of Environmental Protection Wetland Delineation Training Program. Fort Myers, Florida.
- 2002 Completed the FAEP Plant Identification Class with Dr. David Hall

Licenses

- Certified Rescue Diver
- Authorized Gopher Tortoise Agent

**ORGANIZATIONS**

- The Wildlife Society
- Florida Association of Environmental Professionals
- Society of Wetland Scientists
- Florida Native Plant Society

**ECOLOGICAL/TERRESTRIAL BIOLOGY EXPERIENCE**

Floral and Faunal studies established and conducted in Alaska, Guatemala, Dominican Republic, Angola, and Zaire as well as throughout Florida. Studies conducted include species specific population surveys, vegetation density and diversity surveys, vegetation composition surveys, vegetation/ecological restoration projects. Work in Florida has been varied and ongoing for the last seventeen years. Some of the specific projects completed and/or underway include;

- (1998-Present) Overseeing the restoration efforts on a 500+ acre mangrove preserve (Clam Bay). Approximately 50 acres died in 1995 and we designed and implemented a restoration plan geared towards the recovery of the die-off area. To date, the work has been successful in that the area is recovering, wildlife utilization has vastly expanded, and the new mangroves have now survived two hurricanes.
- (2010- Present) Environmental Manager for the Picayune Strand Restoration Project, part of the Everglades Restoration (CERP) Project. Services include weekly conference calls with engineers, consultants and governmental agencies; monthly wildlife education presentations for all new onsite employees; construction oversight; coordination of new nests and any wildlife sightings that are within construction limits or buffer zones; and environmental reporting requirements.
- (2000-Present) Provided all biological services and expert testimony in the permitting of a 1,500+ acre development which was designated as protected species habitat in entirety. Current services also include environmental management of the construction phase.
- (2003) Created a mangrove and grass marsh mitigation peninsula in conjunction with a marina project. The marsh successfully maintained planted species coverage and naturally recruited additional native vegetation and estuarine wildlife.
- Conducting wetland delineation surveys to both State of Florida and U.S. Army Corps of Engineers specifications. Delineated lines have been accepted by agency personnel and have withstood administrative challenges from outside groups.
- Providing expert witness testimony regarding wildlife and wetland issues on various projects.
- (2000) Designed and permitted a Collier County Park (North Naples Regional Park) that allowed visitor access to an approximately 80-acre preserve area with minimal impacts to the preserve.
- Conducting species-specific wildlife surveys and analyses in order to determine utilization and/or potential utilization of properties by target species. Species surveyed for include Florida panther (*Puma concolor coryi*), red-cockaded woodpecker (*Picoides borealis*), crested caracara (*Caracara cheriway audubonii*), Florida scrub jay (*Aphelocoma coerulescens*), eastern indigo snake (*Drymarchon corais couperi*), gopher tortoise (*Gopherus polyphemus*), Florida mouse (*Podomys floridanus*), wood stork (*Mycteria americana*), southern bald eagle (*Haliaeetus leucocephalus*), Florida burrowing owl (*Speotyto cunicularia floridana*), American crocodile (*Crocodylus acutus*), West Indian manatee (*Trichechus manatus*), as well as several others.
- Designing educational interpretational signage related to local plants and animals. Vegetative descriptions and potential wildlife sightings are site specific and tailored to the individual project. These signs are then located in appropriate areas to educate facility users regarding local ecosystems and wildlife.
- Overseeing environmental compliance on permitted projects, including construction oversight, pre-construction wildlife surveys, mitigation coordination, turbidity testing, and water quality sampling.

## **TODD T. TURRELL, P.E., President**

**TURRELL, HALL & ASSOCIATES, INC.**

**3584 Exchange Avenue, Naples, Florida 34104 • Office: (239) 643-0166 • Todd@turrell-associates.com**

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Todd Turrell is an Ocean Engineer licensed in the State of Florida, with over thirty years experience in design and permitting for marine and land development and preservation in south Florida, the Florida Keys, the Bahamas and the Caribbean. Todd leads a diverse group of marine and terrestrial scientists and technical staff that efficiently produce the supporting data and plans for every project. The Turrell, Hall & Associates team has completed the permitting and construction management of over 1,000 yacht slips, and has extensive experience in large mega yacht marinas. The firm has researched the world's yacht fleet and stays current on evolving yacht trends. Todd also has a high level of expertise for marina planning and construction management in the Caribbean basin and the Bahamas. This includes engineering structural components of docking systems, be they floating or fixed, bulkhead plans, dredging, utilities and marina amenities. He has extensive experience in the highly specialized area of marina and mega yacht utilities including electrical services, planning, design and proper utilities construction techniques.

### **EDUCATION**

- 1985, M.B.A., Nova University, Fort Lauderdale, Florida
- 1981, B.S., Ocean Engineering, Florida Atlantic University, Boca Raton, Florida.
- Florida Registered Professional Engineer #39659

### **ORGANIZATIONS**

- The Bahamas National Trust
- Bahamas Air Sea Rescue Association (BASRA)
- The Aircraft Owners & Pilots Association (AOPA)

### **REPRESENTATIVE PROJECTS**

- 2013-Present: Design and permitting of a man-made oxbow, filter marsh, and marina along the Caloosahatchee River.
- 2010-Present: Renovation, construction planning and oversight in St. Petersburg of Maximo Marina.
- 2010-2012: Design and permit a national port and entrance channel in southern Bahamas capable of handling the new sized (Post-Panamax) supertankers and cargo ships.
- 2009-Present: Design and construction planning for the renovation of Tampa Yacht Club, a 50-year old marina on Tampa Bay. Construction oversight is to begin in 2015.
- 2008-2010 (and 1980s): Marine and environmental consulting work for the Bahamas Government.
- 2005-Present: Permit, design and oversee construction of the 71-slip mega-yacht marina, Albany, in Nassau, Bahamas. Work included Environmental Impact Assessment (EIA) and Environmental Management Plan (EMP) documents for the Bahamas Government, marina design, construction plans, bidding process, construction oversight, Fuel Spill Contingency Plan, Hurricane Preparedness Plan, Fire Contingency Plan, and Marina Operations Plan.
- 2004: Completion and environmental planning for the Winding Bay Golf course in Abaco Bahamas. Work included Environmental Impact Assessment (EIA) and Environmental Management Plan (EMP) documents for the Bahamas Government.
- 2002: Project Engineer for channel dredging, navigational aids and new mega yacht berths at the Lyford Cay Yacht Club, New Providence Island (Nassau), Bahamas.
- 1990: Permitting, construction and mitigation design for the 120 slip Marco Island Yacht Club.
- 1989: Expert witness for Florida Department of Transportation involving jurisdictional analysis of 20,000 acres for the expansion of Alligator Alley to I-75 and related acquisitions for the Big Cypress National Preserve.

# MARIELLE KITCHENER

## TURRELL, HALL & ASSOCIATES, INC.

3584 Exchange Avenue, Naples, Florida 34104 • Cell: (239) 253-1860, Work: (239) 643-0166 • [marielle@turrell-associates.com](mailto:marielle@turrell-associates.com)

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Marielle has been Operations Manager of Turrell, Hall & Associates and a Biologist with the firm for over 17 years, providing environmental monitoring, permit compliance oversight, and project management in South Florida and the Bahamas.

### **BIOLOGICAL AND COMPLIANCE SERVICES:**

- Performs water quality and sediment sampling, analysis, and reporting.
- Performs turbidity testing and reporting for both inland and coastal marine projects.
- Monitors preserves and mitigation lands for plant health and species appropriateness, wildlife utilization, and hydrological analyses that contend with water use permitting and wetland health reporting.
- Creates habitat management and restoration/ planting plans for beach dune, upland, wetland, marsh, and mangrove habitats. Also bids out and oversees the planting activities.
- Provides Sovereign Submerged Lands Lease management for marine clientele and oversees compliance with those leases. Also resolves lease violations for new clients.
- Creates for marinas: Hurricane Preparedness Plans, Spill Prevention Control and Countermeasure Plans (SPCCPs), and Fire Prevention and Contingency Plans.
- Specializes in post-permit compliance helping to guide clients through the time-sensitive special conditions which must be met after permit issuance and the drafting of various plans required for those conditions.
- Performs wetland assessments and jurisdictional determinations on single-family and large-scale development projects.
- Conducts wildlife surveys on single-family and large-scale development projects.
- Performs submerged resource surveys and studies.
- Performs water quality sampling for Multi-Sector Generic Permits and prepares Stormwater Pollution Prevention Plans (SWPPPs).
- Prepares Mitigation Management Plans, Preserve Management Plans for development turnover, various wildlife Management Plans, and Environmental Resource Permit Supplements.

### **EDUCATION & TRAINING:**

- 1997- B.S., Environmental Science, Alabama A& M University- Normal, Alabama.
- 1998- Completed the U.S. Army Corps of Engineers Wetland Delineation Certification Training Program. Tampa, Florida.
- 2002- FAEP Plant Identification Class with Dr. David Hall.
- 2003- Department of Environmental Protection Wetland Delineation Training Program. Fort Myers, Florida.
- 2007- Certified by Ostego Bay Foundation as an Oil Spill First Responder Hazardous Materials Technician.
- 2000- PADI Certified Open Water Diver

### **ASSOCIATIONS**

- Big Cypress Basin Board Member (July 2013- present)
- Lake Trafford Management Team (2013- present)

## **JEFFREY ROGERS**

### **TURRELL, HALL & ASSOCIATES, INC.**

**3584 Exchange Avenue, Naples, Florida 34104 • Office : (239) 643-0166 • Jeff@turrell-associates.com**

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Jeff Rogers graduated with a Bachelor of Science Degree in Environmental Science from Rollins College in 2005. As a Staff Biologist with Turrell, Hall & Associates, Inc. Jeff has been involved with single-family dock and marina permitting, dredge design and permitting, threatened and endangered species surveys, submerged resource surveys, vegetative mapping and classification, jurisdictional wetland determinations, preserve management and monitoring, water quality sampling and turbidity testing, environmental resource permitting and coordinating with various agency staff on company projects.

#### **REPRESENTATIVE PROJECTS**

##### Naples Baker Park Project, Naples, FL (2014- 2015)

Jeff was responsible for collecting the initial data for the environmental due diligence phase of the Naples Baker Park Project. Services included the submerged resource survey, threatened and endangered species survey, and coordination with state agents on requirements for marine facility permitting and bridge permitting. Jeff helped prepare documents which the City used for budget and construction planning purposes.

##### Clam Bay Restoration and Monitoring Project, Naples, FL (1999- Present)

Turrell, Hall & Associates have been managing the restoration of a mangrove die-off in the Clam Bay Estuary since 1999 for Pelican Bay. Restoration efforts include annually measuring the progress of mangrove growth in die-off zones, searching for new areas of stress and monitoring of the seagrass beds in the system. Jeff has been an integral part of those monitoring efforts since 2006 and has helped to prepare the annual monitoring report and presentation to the Pelican Bay Board each year since.

##### Hideaway Beach Submerged Resource Survey for Collier County, Marco Island, FL (2010- 2013)

In order to comply with coastal permit monitoring requirements, semi-annual submerged resource surveys are conducted by Turrell staff. Jeff has led each monitoring event and prepared the draft report for submittal by the Engineers of Record.

##### Port Royal Water Depth and Dredge Scenario Analysis, City of Naples, FL (2011)

In 2011 Jeff the lead the THA team which collected water depths throughout the Port Royal canal system and provided cost estimates and basic dredge plans for the City to analyze the amount of spoil to be removed in each canal, the cost associated, logistical issues and permitting scenarios with regards to dredging the existing canals.

#### **EDUCATION**

- 2004 Sustainable Development Course – Galapagos Islands, Ecuador
- 2005 B.A.-Environmental Science from Rollins College- Orlando, Florida
- 2006 Course to establish U.S. Merchant Marine Officer 100 ton License
- 2006 Florida Gulf Coast Plant Identification Course with Dr. Hall of University of Florida
- 2006 Rookery Bay Workshop for Managing Small Docks and Piers
- 2007 Southwest Florida Association of Environmental Professionals Wetland Delineation Training Course
- 2007 Florida Department of Environmental Protection Environmental Resource Permit Course

#### **LICENSES**

- 100 Ton Merchant Mariner Captain's License
- Certified PADI and Rescue Diver

## **JOSHUA W. MAXWELL**

### **TURRELL, HALL & ASSOCIATES, INC.**

**3584 Exchange Avenue, Naples, Florida 34104 • Office (239) 643-0166 • Josh@Turrell-Associates.com**

Joshua W. Maxwell is the Senior Staff Engineer at Turrell, Hall & Associates, Inc. As the Senior Staff Engineer for Turrell, Hall & Associates, Joshua works closely with State, Federal, and local government agencies to obtain approvals for our various marine-related projects. His responsibilities with the firm are submerged and benthic resource analyses, waterfront development and design assistance, environmental resource permitting, marine construction plan preparation, marine construction bid document preparation and bidding, marine construction management oversight, and performing flushing studies and hydrographic analysis for proposed marinas.

#### **EDUCATION:**

2008- B.S. Ocean Engineering  
Florida Atlantic University

#### **CERTIFICATIONS:**

- Certified Open Water & Nitrox Diver
- Engineering Intern # 1100012577

#### **REPRESENTATIVE PROJECTS:**

##### La Peninsula- Isles of Capri, Naples, Florida (2014- Present)

La Peninsula is a community of high-rise condominiums located on the western-most tip of Isles of Capri. The peninsula is a relatively narrow strip of land and is subject to foul Gulf weather and waves. The existing seawall which supports the substrate under the community has been determined to be in poor condition. Josh is working with a structural engineer to prepare and permit a plan to entomb the existing seawall so the new system will serve as a breakwater for severe storms and provide substrate support needed.

##### Collier County Artificial Reef Project- Collier County, Florida (2012- 2014)

Josh assisted the City of Naples, the City of Marco Island, and Collier County with research on construction methods, materials, insurance requirements, construction costs, construction bid requirements, artificial reef expertise coordination, and application preparation to permit the creation of a series of artificial reefs offshore in Collier County for recreational use.

##### Maximo Marina- St. Petersburg, Florida (2010-Present)

Josh permitted the renovation of an existing 326-slip (281 covered & 45 uncovered) marina and replacement of 3,100 linear feet of seawall, including maintenance dredging activities. Josh has overseen the construction specifications, bid preparation, bidding and contract selection, and construction oversight of the first phase. Services for future phases are currently underway.

##### Tampa Yacht and Country Club – Tampa, Florida (2009-Present)

Josh permitted the renovation of a 50 year old marina on Tampa Bay with the Tampa Port Authority, and the State and the Federal governments. The existing 80 slip (covered and uncovered) marina has been redesigned to include 105 wet slips (covered and uncovered), including re-enforcing the marina's breakwater to ensure it remains a safe harbor during storm events. The project is currently out to bid and construction is planned to begin in February 2015.

#### **ORGANIZATIONS:**

- Marine Industry Association of Collier County
- National Society of Professional Engineers
- Florida Engineering Society
- Society of Naval Architects and Marine Engineers
- Boy Scouts of America (Eagle Scout and Assistant Scoutmaster)

## **ARIELLE POULOS**

### **TURRELL, HALL & ASSOCIATES, INC.**

**3584 Exchange Avenue, Naples, Florida 34104 • Office : (239) 643-0166 • [Arielle@turrell-associates.com](mailto:Arielle@turrell-associates.com)**

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Arielle Poulos graduated from Florida Gulf Coast University in 2002 with a double major in Biology and Environmental Studies and has also been pursuing a graduate degree in Marine Science from University of Florida. Arielle was employed with the Department of Environmental Protection from 2005 to 2014 as an Environmental Specialist, coming to work for Turrell, Hall & Associates in April 2014 as Staff Biologist and Project Manager.

Arielle has extensive marine and terrestrial biological experience from both the FDEP and research projects conducted outside the agency. Currently her role at Turrell, Hall & Associates is performing submerged resource surveys, marine permitting, wetland delineations, habitat management plan preparation, and site assessments.

#### **EXPERIENCE**

- 2015- Is working with Glades County and FWC to write a Manatee Protection Plan.
- 2015- Is providing sea turtle nest monitoring during the renovations to the Naples Pier.
- 2014- Assisted with finalization of the 10-Year Clam Bay Management Plan and is also involved in the permitting various aspects of the plan.
- 2014- Is providing wetland determination and wildlife specific survey services for several large-scale development projects on forested parcels, as well as environmental permitting services.
- 2014- Is providing dock permitting services and CCCL/ CCCL permitting services for barrier island or beach development projects.
- 2014- Conducted a Marine Resource Presence Survey from the north end of Bonita Beach to the north side of Big Carlos Pass in Estero prior to several miles of dredge pipeline being laid for renourishment of Lover's Key and north Bonita Beach.
- Sea-turtle nest location, excavation and monitoring (Rookery Bay Program)
- University of Florida and Charlotte County Sea Grant Extension resource monitoring of bay scallops and bay scallop health in The Lemmon Bay, Gasparilla Sound and Pine Island Sound Great bay Scallop Search.
- Charlotte Harbor National Estuary Program 2010 Shoreline Survey- conducted surveys of the shoreline in Charlotte and Lee Counties to determine percentage of hardened shoreline, mangroves and exotics species for a determination of the overall health of Charlotte Harbor and its aquatic preserves.
- Florida Department of Environmental Protection- Environmental Specialist 2005-2014:
  - Biological Assessments
  - Wetland Delineations
  - Wetland Permitting
  - Dock/Marina Permitting
  - Public Relations
  - Media Relations

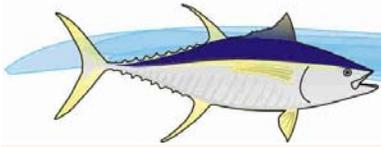
#### **EDUCATION**

- 2002 B.A. Biology - Florida Gulf Coast University
- 2002 B.A. Environmental Studies- Florida Gulf Coast University (FGCU)
- Pursing M.S. Marine Science- University of Florida
- Graduate Level Courses in Botany and Physical Oceanography- FGCU
- Graduate Level Course in Marine Mammal Management- Nova Southeastern University
- Wetland Delineation & Soil Science

#### **LICENSES/ CERTIFICATIONS**

- Certified PADI Open Water Diver
- FDEP Snorkeling Certification
- Certified Stormwater Inspector

# SAMPLE WORK PROJECT SHEETS



# Turrell, Hall & Associates, Inc.

marine & environmental consulting



*Project Site*



*Florida Panthers photographed on the site.*

## Picayune Strand Restoration (CERP) Project • Environmental Management

This CERP project consists of spoil and road removal, canal plugging, and construction of pump stations, and associated features which will help restore habitats to pre-development conditions.

Since 2010 Turrell, Hall & Associates (THA) has been the environmental managers for the Merritt, Faka-Union and Miller Pump Station phases that define this CERP project. We have worked with the U. S. Fish & Wildlife Service, the Army Corps of Engineers, the South Florida Water Management District, the Department of Environmental Protection and the contractors to develop an Environmental Protection Plan for each of the pump station phases, and coordinated with the contractor regularly to ensure all aspects of work remained compliant with environmental permitting and the biological opinion. Services have included: wildlife monitoring, nuisance wildlife coordination, reporting of wildlife fatalities, compliance inspections, weekly conference calls, annual reporting, and an educational program.

Because of the number of listed species in Picayune, educational programs (pamphlets, posters, a video and presentations) are presented to all visitors and personnel working within the project site prior to site access.



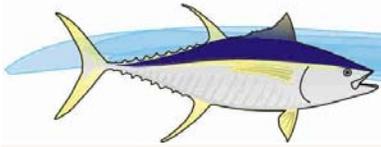
*Merritt Canal Pump Station under construction June 2012 (above).  
Faka-Union Pump Station under construction June 2012 (below).*



Website: [www.turrell-associates.com](http://www.turrell-associates.com)  
Email: [tuna@turrell-associates.com](mailto:tuna@turrell-associates.com)

Turrell, Hall & Associates, Inc.  
3584 Exchange Avenue  
Naples, Florida 34104

Phone: 239-643-0166  
Fax: 239-643-6632



## ESPLANADE CREATED WADING BIRD HABITAT

The Esplanade project is a 1,543-acre development, encompassing 964 acres of wetland and 122 acres worth of upland preserve. Included in the preserved area is a 14.5-acre wading bird habitat created from uplands and fallow agricultural land. This area was designed to provide various levels of inundation throughout the year as the water table rises and falls onsite. Even at the end of the dry season some of the deeper pools remain for bird foraging.

To-date winter bird monitoring has documented a very diverse range of species, including a large number of woodstorks from Corkscrew Swamp.



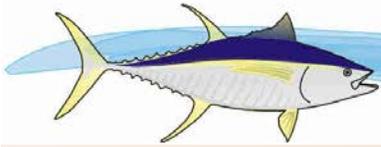
*Above: A flock of white pelicans using the marsh*

### WADING BIRD HABITAT

*Before:  
Woods and fallow agricultural  
land*



*After:  
Created Wading Bird Habitat*



# Turrell, Hall & Associates, Inc.

marine & environmental consulting



*Above: Die off area in 1999.*

*Below: Same area in 2008.*



## Clam Bay • Environmental Consulting • Naples, Florida

Turrell, Hall & Associates, Inc. has been the lead consultant for restoration and maintenance activities in the Clam Bay ecosystem since 1998. The system consists of a series of shallow estuarine lagoons with approximately 500 acres of mangrove forested areas, open shallow water areas, sea grass beds, and dune/beach habitat.

In 1995 and 1996, approximately 50 acres of mangroves died due to a combination of issues including poor water circulation (flushing) and high rainfall. This die-off resulted in a community wide concern over the health of the system which prompted the restoration efforts undertaken.



*Above: Flushing cuts in 2002.*

Ground truthing and aerial photography were used to accurately and efficiently map and catalogue vegetative communities in Clam Bay. Restoration efforts focused on improving the flushing capabilities within the system and maintaining a self-sustaining cross section through the Pass itself. A combination of modeling, field investigations, and field verification of actions implemented led to a successful restoration project and more than 50 acres of recovering mangrove community.

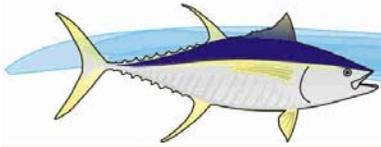


*Above: Clam Bay in 2010.*

Website: [www.turrell-associates.com](http://www.turrell-associates.com)  
Email: [tuna@turrell-associates.com](mailto:tuna@turrell-associates.com)

Turrell, Hall & Associates, Inc.  
3584 Exchange Avenue  
Naples, Florida 34104

Phone: 239-643-0166  
Fax: 239-643-6632



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Turrell, Hall & Associates (THA) managed a public access project along the Imperial River for the City of Bonita Springs known as Bonita Trail Phase I from 2011-2013.

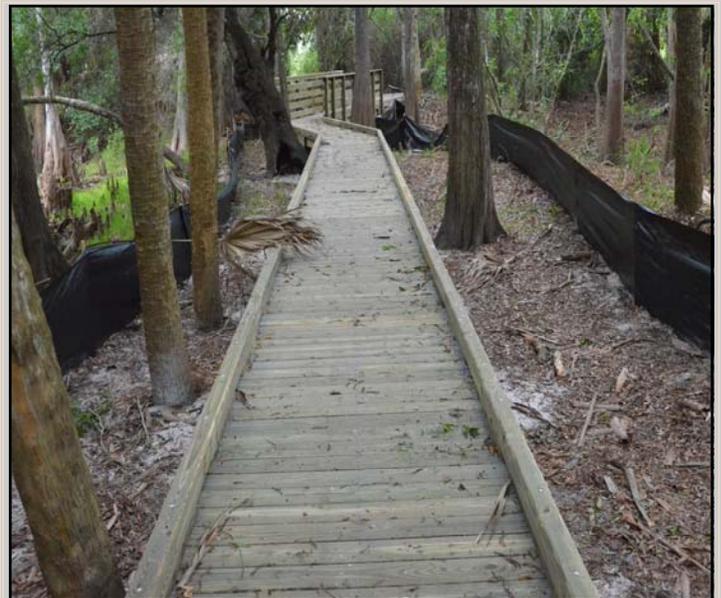
THA led a team to design and permit parking, boardwalks and a kayak launch along the Imperial River. Post-permitting, construction drawings and bid documents were prepared for the City. Our team also provided the construction oversight and final engineering certifications for this public access project.



Environmental Permitting, Design & Engineering, Bidding & Construction Oversight  
Bonita Trail: Phase I, Bonita Springs, FL



**BEFORE**



**AFTER**

Website: [www.turrell-associates.com](http://www.turrell-associates.com)  
Email: [tuna@turrell-associates.com](mailto:tuna@turrell-associates.com)

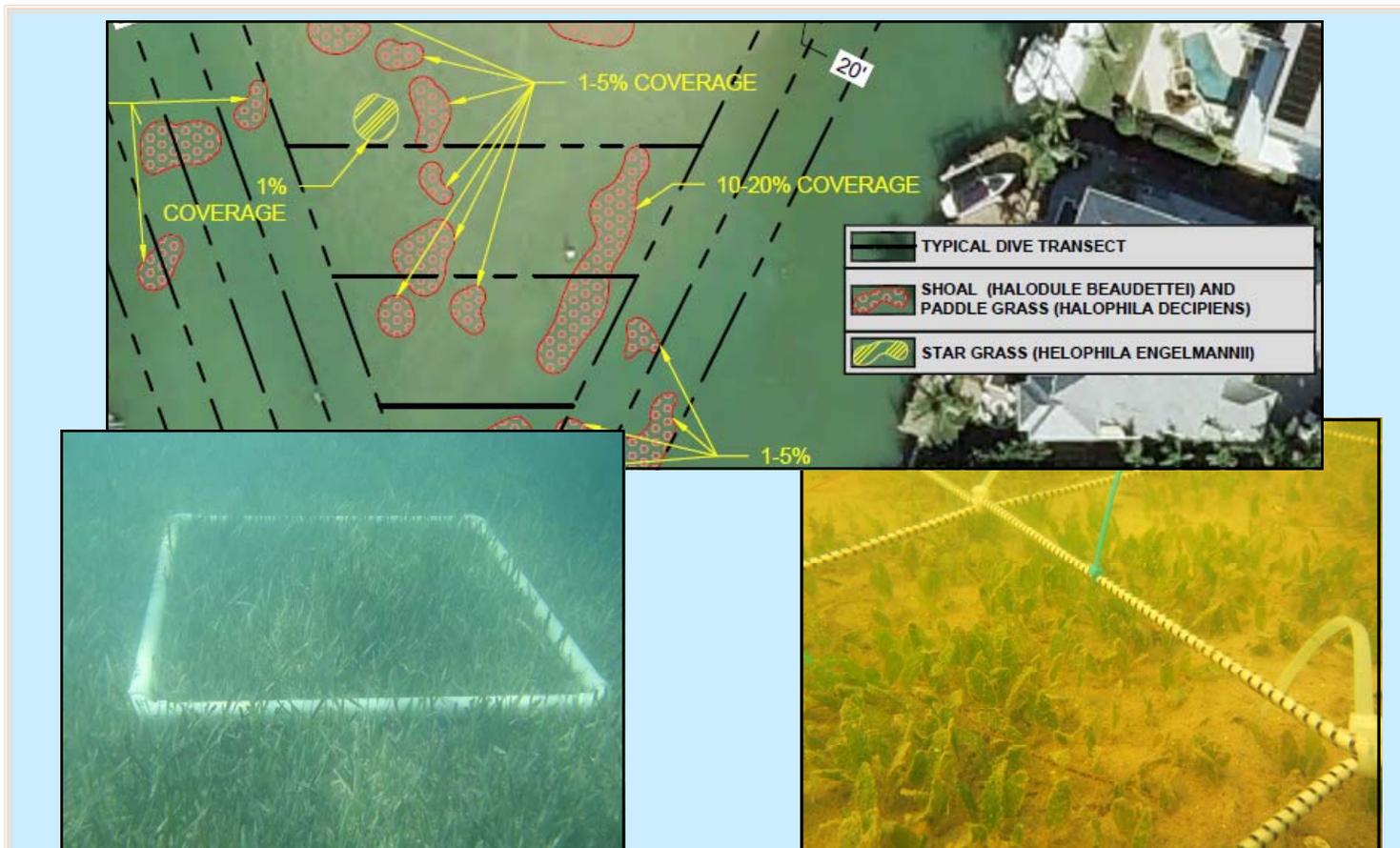
Turrell, Hall & Associates, Inc.  
3584 Exchange Avenue  
Naples, Florida 34104

Phone: 239-643-0166  
Fax: 239-643-6632



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## SEAGRASSES

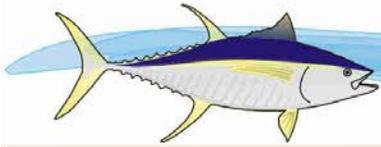
Turrell, Hall & Associates (THA) performs several dozen submerged resource surveys a year on various types of marine projects, with approximately 30% of the surveys yielding seagrass beds. In the past few years we have mapped seagrass beds within Doctor's Pass, in coastal waters off Hideaway Beach (Marco Island), Riviera Beach City Marina (Palm Beach), Port Mayaguana (Bahamas), and Clam Bay to name a few. In certain cases delineation of the seagrass beds with percent species coverage was all that was required for avoidance and minimization planning purposes, but in other cases the seagrass beds were examined to help determine what affects dredging or sand placement and water quality were having on them. In the case of Clam Bay, when the benthic survey has been completed each summer, we have also examined water quality trends throughout the bay system for a correlation between seagrass findings and the affects renewed flushing might have had on the system after the pass had been dredged.

THA have several staff members who regularly perform submerged resource surveys for all of our marine projects. In addition to annual survey experience, Arielle Poulos, while with the Department of Environmental Protection, helped to establish a UMAM criteria baseline for seagrass habitats. Creating the baseline entailed sampling seagrass beds in coordination with the TMDL program and water quality sampling locations within Lemon Bay, Charlotte Harbor, the Peace River, Pine Island Sound, Matlacha Pass, the Caloosahatchee River, San Carlos Bay, Estero Bay and Rookery Bay. Vertebrates and macro-invertebrates were sampled and recorded at each site in an effort to determine the effect, if any on species utilization by water quality.

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Email: [tuna@turrell-associates.com](mailto:tuna@turrell-associates.com)

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## Albany Marina • Design and Construction • New Providence, The Bahamas

The Albany Marina is part of a development being constructed on the southwest coast of New Providence Island. The finished project will have a village with commercial and residential structures, an 18 hole Tiger Woods – Ernie Els golf course, a marina, beach amenities, and more.

The marina will contain 71 wet slips from 50 ft. to 240 ft. in length. Dry storage for smaller boats will be provided. The entrance to the marina is protected by jetties and a mile long channel which connects the marina to deep water.



*Above: Marina basin in December 2010.*

Turrell, Hall & Associates, Inc. provided the engineering, design, and construction management of the 15 acre marina basin, docks, and complete utility systems.

Additional services also included processing the E.I.A. (Environment Impact Assessment) and E.M.P. (Environmental Management Plan) for the entire project.



*Above: Marina Master Plan by Turrell, Hall & Associates, Inc.*

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Naples, Florida 34104

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Fax: 239-643-6632

# MARINE SERVICES

The engineers & marine construction professionals at Turrell, Hall & Associates have been providing marine services to waterfront condominiums and homeowners in the Naples area for over 30 years.



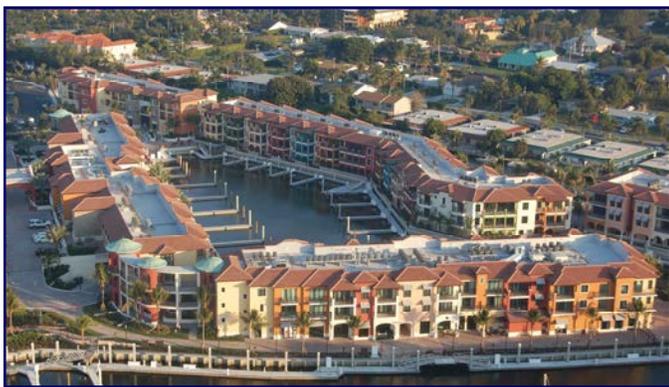
*Concrete Docks & Boat Lifts*



*Seawalls & Shorelines*

Our firm offers design, permitting and construction management for all waterfront projects. From single family docks and seawalls to large scale marina facilities, our team of experts can provide a wide range of services, no matter the size of the project.

The marine construction professionals of Turrell, Hall & Associates help bridge the gap between property owners, government permit agencies and the marine contractors who do the work.



*Naples Bay Resort - Design & Permitting  
Concrete & Wood Docks, Dredging, Bulkheads & Rip Rap*

Our extensive hands-on experience allows us to offer cost effective solutions to problems which often arise during the course of marine construction. We have a proven and successful track record with our clients and a stellar reputation with the marine contractors we routinely work with. Our aim is to simplify the construction process and protect your interests.

## Services Include:

- Dock Design & Permitting
- Waterfront Engineering & Consulting
- Seawall Assessment & Recommendations
- Construction Bidding & Oversight
- Site Management & Reporting

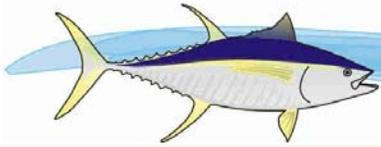


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*Above: Gopher Tortoise burrow located at project site.*

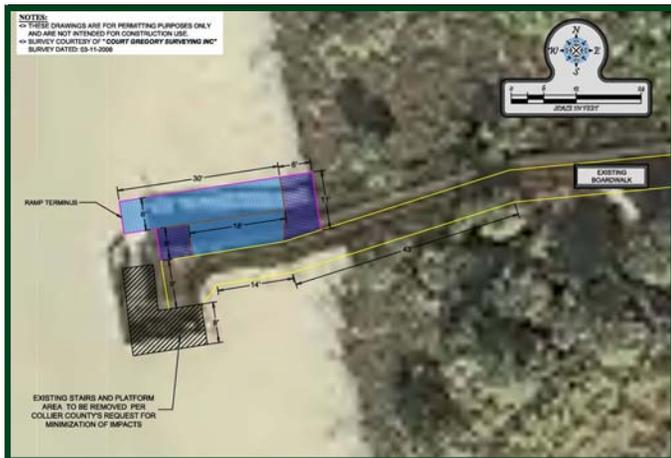
*Below: Gopher tortoise burrow protected by silt fence during dune walkover pile installation.*



## The Carlyse • CCCL & CCSL- Design & Permitting • Naples, Florida

In 2008, Turrell, Hall & Associates was hired to handle local and state environmental permitting and to oversee the construction of improvements to the dune walkover / beach access at The Carlyse, located in Bay Colony of Naples, FL.

Other services required for the project included a gopher tortoise survey. A juvenile gopher tortoise burrow was identified within the 25 ft. allowable radius of the proposed construction and required permitting and coordination with the Florida Fish and Wildlife Conservation Commission (FWC), as well as, habitat and species management plans.



*Above: Permitted ADA boardwalk access ramp.*

More specifically, an ADA access ramp was permitted and constructed to replacing the existing stair access of the beach access. Permitting required CCSL and CCCL authorizations from Collier County and the DEP Beaches and Coastal Division, respectively.

*Right: A view out to the beach from the boardwalk at The Carlyse.*



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