

**COMMUNITY
DEVELOPMENT
DEPARTMENT**

**CONTRACT
WITH CALVIN,
GIORDANO &
ASSOCIATES
(CGA)**

GOALS FOR THE CONTRACT

- Provide Levels of Service equal to or in excess of Lee County Community Development;
- Recognize and encourage the Estero Vision in Land Development;
- Provide full service staff to Estero's Land Use Boards;
- Promptly provide information to both citizens and developers regarding the land use process in Estero; and
- Contract pricing to be competitive with Lee County. A work in progress!

COMMUNITY DEVELOPMENT STRUCTURE

■ DEPARTMENTS:

- ADMINISTRATION;
- PLANNING AND ZONING SERVICES;
- DEVELOPMENT REVIEW SERVICES;
- CODE COMPLIANCE;
- INFORMATION TECHNOLOGY SERVICES;
- BUILDING DEPARTMENT.

ADMINISTRATION

- Overall supervision and administration of contract by Village of Estero Community Development Director;
- CGA contact person: Shelley Eichner, CGA Senior Vice President;
- Overall split of personnel between Village offices and CGA home office in Fort Lauderdale.
- Full backup coverage for all Estero based personnel for vacation/holidays when necessary.

PLANNING AND ZONING

- Estero based staffing to consist of one Senior Planner, one Zoning Technician, and one receptionist/intake person;
- Handles all aspects of zoning and planning for land developments for routine applications;
- Prepares and coordinates all agendas/packets for both Land Use Boards;
- Performs all planning and zoning reviews not subject to Cost Recovery (see below).

DEVELOPMENT SERVICES

- Estero based staffing consisting of one Senior Development Review Planner and one clerk;
- Intake and review of all routine development order applications;
- Coordinates one pre-application meeting for cost recovery applications;
- Coordinates and manages all CGA consultants in DO process to achieve DO/Site Plan approval.

CODE COMPLIANCE

- Estero based staff consisting of one Code Compliance Officer and one part-time clerk to be shared with Building Department.
- Handles all code compliance inspections, courtesy notices, violations and hearings before special magistrate (hearing program to be enacted);
- Pro-active outreach to businesses and citizens to educate about code issues; and
- Coordinates Business Tax receipt program.

INFORMATION TECHNOLOGY SERVICES

- Estero based staff to consist of one System Support Manager.
- Creates and maintains full IT system for Estero (hardware and software review, acquisition assistance);
- Sets up and maintains proprietary software systems from CGA for Code Enforcement, Building and Permitting, Planning and Zoning , Business Licensing, and software for the management of all of the Village's documents and records.

BUILDING DEPARTMENT SERVICES

- Estero based personnel include one Chief Building Official, one plans Examiner/Inspector, one full time clerk, and one part-time clerk shared with Code Enforcement.
- Handles all building permit applications from intake, review, processing, inspections, and closeout.
- Maintains all files for access by staff and the public at all times.

FEE BASED APPLICATIONS

- Similar to existing Lee County Fee Schedules, the Village will enact a fee schedule for all routine applications which will mostly be handled by Estero based personnel.
- All fees received by the Village for this type of zoning, planning and development order/site plan applications will be revenue for the Village to offset the fixed fees in the CGA Contract.
- All non-routine applications will be subject to the Cost Recovery System.

COST RECOVERY SYSTEM

- By Ordinance, the Village will recover an administrative fee for certain major applications in the development process;
- The administrative fee will consist of a fee for the general administrative costs of the Village reflecting the time spent by the Director, the Village Clerk and the Village Manager, along with the actual costs on an hourly basis plus expenses of CGA personnel and experts (based on time records maintained by CGA).

COST RECOVERY SYSTEM (CONT.)

- The cost recovery fee will be based on an initial deposit schedule which will be recharged when it is spent down.
- Work will not continue until there is sufficient funds in the CRS account for the development to reasonably complete the expected work.
- Upon closeout of the permits, any sums left in the account will be returned to the applicant.
- CRS will mostly apply to major applications requiring complex expert services.

BUILDING PERMIT/INSPECTION FEES

- The fee schedule for Building Permits and Inspections will be similar to the current Lee County Permit Schedule.
- All fees go into a overall building services special revenue account, and can be used by the Village only to offset the direct costs of the Building Department, but including the IT systems and maintenance that are developed and utilized for the Community Development Department.

ON-SITE PERSONNEL COSTS

- The Fixed Fee portion of the Contract relates to all of the on-site staff from CGA.
- Current on-site staffing estimates include 11 full time people (under negotiation).
- Costs under the fixed fee contract are based on CGA salaries, fringe benefits, general and administrative overhead, and includes expenses such as phones, vehicles, computers etc.
- At present we are working to determine the CGA margins in the fixed fee proposals.

HOW TO ANALYZE FIXED FEES

- **Current Lee County Services as per the Interlocal are for expenses of \$713,284 with Lee County keeping all zoning, planning and DO fees.**
- **Permit Fees for calendar year 2014 were approximately \$1,750,000 based on Lee County data (approx.\$1.5M for building permit fees and \$250K for planning, zoning and development services).**
- **Lee County covers all costs of building permits and inspections from permit fees, and we are not being charged more for these services under the Interlocal.**

HOW TO ANALYZE FIXED FEES (CONT.)

- 2014 Lee County permit fees may be more in 2015 (collections through 7/31/15 = \$1,361,313 or an est. \$2.3M+ for calendar 2015)
- Assuming the building permit fees stayed the same as 2014 or decreased to a conservative estimate of \$1.3M, the building permit fees should easily cover all CGA fixed fees for the Building Department and the IT Department along with the start-up expenses of the proprietary software (est. \$950K).
- We are still negotiating the fixed fees under the CGA Contract for all departments.

ISSUES LEFT TO DO

- Delineate where fees vs. cost recovery system applies;
- Routine application Fee Schedule and Initial Deposit requirements for CRS;
- Final negotiation of CGA Fixed Fees;
- Contract provisions such as periodic review/analysis of Fixed Fees and staffing levels;
- Contract Drafting;
- CRS/Permitting Fees Ordinance; and
- Transition Plan with CGA and Lee County.

APPROVAL SCHEDULE

- Draft CGA Contract and Resolution to be heard at September 16th Meeting.
- First reading of Ordinance for Cost Recovery System and Ordinance for Special Magistrate Code Compliance Hearings will be heard on September 16th.
- Resolution setting Permit Fees and Initial Deposits under CRS heard September 16th.
- Final hearing and approval of Ordinances by end of September (date in process).