

PROPOSAL TO THE:

**City of Hallandale Beach,
Florida**

TO PROVIDE A:

**Department of
Sustainable Development
Building Permit Fee
Assessment**

Submitted by:

Berry, Dunn, McNeil & Parker, LLC
2211 Congress Street, Portland, ME 04102

berrydunn.com

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Proposal Submitted On:
January 29, 2025



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January 29, 2025

City of Hallandale Beach
Attn: Theresa Sisto, Permit Services Manager
400 South Federal Highway
Hallandale Beach, FL 33009

Dear Theresa Sisto:

On behalf of Berry, Dunn, McNeil & Parker, LLC (BerryDunn), thank you for the opportunity to share how our team can help the City of Hallandale Beach (the City) by conducting a Building, Planning, Zoning, Fire and Engineering Reviews Fees Assessment (Fee Assessment). We appreciate the time you have taken to discuss your goals for this initiative.

BerryDunn is an award-winning professional services consulting firm, headquartered in Portland, Maine, with 10 offices nationally. **Focused on inspiring organizations to transform and innovate**, we are a stable and well-established firm that has preserved our core values and reputation for excellence throughout our 51-year history. We have enjoyed steady growth by providing consistent, high-quality services to our clients in all 50 states, Puerto Rico, and Canada.

We have a dedicated Local Government Practice Group that works with public-sector organizations like the City to calculate and assess the costs of providing services to their constituents and commercial partners. In particular, our Community Development and Utility Operations Practice specializes in assessing the costs to provide services such as building, permitting, inspections, code enforcement, licensing, fire and engineering reviews, public works, planning, asset management, and work orders. As the City seeks to determine full costs of service for the in-scope services, BerryDunn will help establish a solid foundation for understanding the City's costs to provide services and help ensure associated fees for services reflect the appropriate level in relation to the full cost to provide the service.

We have had the privilege of providing many fee study and cost recovery services to communities throughout the State of Florida (the State). This includes comparable projects with the Cities of Fernandina Beach, Gainesville, Homestead, and Largo; the Town of Longboat Key; and Alachua and Manatee Counties. This insight into your State's building, permitting, and inspection compliance regulations will help our team provide applicable recommendations and insights during this Fee Assessment. Our well-rounded perspective is strengthened by work serving an additional 35 cities, towns, and counties throughout the State on projects ranging from parks and recreation master plans to communitywide strategic plans and technology consulting services.

We have firsthand public-sector experience. Our team is led by our proposed project manager, Jesse Myott, who has over a decade of direct local government experience related to municipal finance, public works, and community development service delivery. He has conducted more than 30 comparable cost-of-service and fee studies. Jesse is joined by consultants with deep subject matter expertise, including our proposed subject matter expert, Khara Dodds, who previously held titles such as director of development services and director of planning and community development. Because of our direct experience, we understand City staff's daily time commitments and responsibilities, and we will work to minimize disruptions.

No matter how many cities and counties we assist, we aim to tailor the experience to the nuanced needs and resources of each client. We appreciate the opportunity to submit this proposal, and we look forward to working with you on this important initiative. As a principal in our Local Government Practice Group, I am authorized to bind BerryDunn to the commitments made herein. Our proposal is a firm and irrevocable offer valid for 120 days following the submission deadline of January 29, 2025. **If you have any questions regarding our proposal, please consider me the City's primary point of contact.**

Sincerely,

A handwritten signature in black ink that reads 'Kevin Price'.

Kevin Price, MPP, PMP®, Prosci® CCP | Principal

Berry, Dunn, McNeil & Parker, LLC
207.541.2379 | kprice@berrydunn.com

1. About BerryDunn

BerryDunn is a nationally recognized independent management and IT consulting firm focused on inspiring organizations to transform and innovate. A Limited Liability Company formed in 1974 with 73 principals and 37 owners, BerryDunn employs more than 935 staff across 10 offices from Maine to Hawai'i.

Our Consulting Services Team employs more than 335 staff and has been serving state, local, and quasi-governmental agencies for nearly 40 years. From extensive project experience for more than 650 state, local, and quasi-governmental agencies, our team brings valuable perspectives to every engagement. Our firm provides a full range of professional services that supports our ability to complete tasks outlined by the City on this initiative. These include:

- **Cost of Service and Fee Studies**
- Business Process Improvement, Reviews, and Redesign
- Comprehensive/Master Planning
- Enterprise and Departmental Strategic Planning
- IT Assessments and Strategic Plans
- Leadership and Organization Development
- Organizational, Operational, and Staffing Analyses
- Organizational Change Management
- Performance Analyses
- Project Assessments and Remediation
- Software Planning and Procurement
- Software Implementation Project Management and Oversight

Our team has experience serving state and local government agencies, providing them with an in-depth understanding of government operations, staffing needs, budgetary constraints, and the business processes required to provide necessary services to the internal divisions and the constituents the City serves. As American Institute of Certified Planners (AICP)-certified planners, our team understands the importance of sound planning principles, community vision setting, and the need for innovative regulations to carry out planning priorities.

Figure 1 illustrates the overall organization of BerryDunn's Local Government Practice Group. We provide unparalleled expertise and unique insights across these practices, supporting our clients in solving some of their biggest challenges and addressing opportunities to improve and plan.

Figure 1: Local Government Practice Group Specialization



As mentioned, BerryDunn's **Community Development and Utility Operations Practice** will serve the City on this initiative. This practice focuses on municipal and county policies, processes, fees, and systems related to planning, zoning, permitting, inspections, development services, code enforcement, land management, work order, and asset management functions. This practice is composed of industry experts with both firsthand and project experience.

2. Relevant Experience

Local Government Finance from Multiple Perspectives

In Table 1, we provide a representative sample our team’s experience conducting fee study, cost recovery, and cost allocation planning projects for various local government departments across the country. This well-rounded perspective will bring value to the City as it strategically plans for the coming years. BerryDunn’s holistic approach will center both the City’s personnel and the constituents you serve.

Table 1: Sample Experience of Services Provided Across Departments

Department/Service Area	Client	Work Performed
Community Development and Utility Operations	Alachua County, FL	Building and Fire Permit Fee Study
	City of Boise, ID	Entitlement, Permitting and Inspections Service Cost and Fee Analysis
	City of Bozeman, MT	Community Development Fee Review Study
	City of Bozeman, MT	Engineering Review Fee Study
	City of Bozeman, MT	Infrastructure Review Fee Study
	City of Gainesville, FL	Building Permit Cost of Service Study
	City of Gainesville, FL	Fee Schedule Update
	City of Dallas, TX	Comparative Building Permit Fee Study
	City of Fernandina Beach, FL	Building Division Fee Study
	City of Homestead, FL	Workflow and Comparative Fee Analysis
	City of Largo, FL	Building Permit Fee Study
	City of Tucson, AZ	Cost of Service Study and Fee Schedule Redesign
	Manatee County, FL	Building and Development Services Fee Study
	Sonoma County, CA	Fee and Cost Recovery Peer Comparison
	Town of Longboat Key, FL	Comprehensive Fee Study
	Town of Smithfield, RI	Water Rate Study
	Town of Smithfield, RI	Sewer Rate Study
Town of Smithfield, RI	Solid Waste Collection Cost of Service Analysis	

Department/Service Area	Client	Work Performed
	Town of Smithfield, RI	Utility Billing Analysis
	Travis County, TX	Development Review Process and Fee Study
Parks and Recreation	Charleston County, SC	Cost of Service and Fee Study*
	City of Bozeman, MT	Recreation Cost of Service Study*
	City of Cape Coral, FL	Comprehensive Fee Study
	City of Jefferson City, MO	Cost Recovery Study/Plan
	City of Ferguson, MO	Cost of Service Analysis*
	City of Grapevine, TX	Cost Recovery, Fee Study, and Resource Allocation Plan
	City of Lynchburg, VA	Cost of Service Analysis*
	City of Mesa, AZ	Cost of Service Analysis**
	City of Mobile, AL	Cost Recovery Analysis
	City of Pflugerville, TX	Cost of Service and Fee Study**
	City of Raleigh, NC	Cost of Service and Fee Study
	City of Sanibel Island, FL	Cost of Service Analysis**
	City of Tampa, FL	Fiscal Analysis*
	City of University Park, TX	Cost of Service Consulting
	Granville County, NC	Parks and Grounds Cost of Service Analysis**
	Howard County, MD	Fiscal Analysis*
	Jackson County, MS	Cost of Service Analysis*
	Lake County, CO	Community Planning and Development Fee Study
Maricopa County, AZ	Parks Fee Analysis	
Town of Crestwood, CO	Cost of Service Analysis*	
Town of Queen Creek, AZ	Cost of Service and Fee Study	
Wilmette Park District	Cost of Service Analysis**	

Department/Service Area	Client	Work Performed
Information Technology (IT)	City of Irving, TX	IT Department Cost Allocation Plan
Citywide	City of Villa Park, CA	Fee and Rates Charges Study

*Completed as part of a larger master or strategic planning project for a subcontracting partner

**Completed as part of a larger, BerryDunn-led master or strategic planning project

Focus on Planning, Community, Development, and Building

Our prior experience includes working directly with development services, community development, planning, permitting, land management, and building departments. Therefore, we understand the complexity of the services the City provides, the stakeholder groups, and the systems and processes that support the delivery of services to customers. Table 2 presents highlights of our relevant experience for the City's review.

Table 2: Planning, Community Development, and Building Experience Highlights

Client	Worked Performed	Dates
Municipal Clients		
City of Attleboro, MA	Development Review Process Improvement Services	11/2021 – 06/2022
City of Beaverton, OR	Community Development Department Organizational Development	09/2019 – 01/2020
City of Beaverton, OR	Electronic Permitting System Consultant and Implementation Project Manager	01/2019 – 04/2023
City of Boca Raton, FL	Community Development System Selection and Implementation Assistance	07/2017 – 03/2023
City of Boise, ID	Entitlement, Permitting, and Inspections Cost of Service and Fee Analysis	04/2024 – Present
City of Boston, MA	Business Process Mapping and Improvement of Right-of-Way Coordination and Management	12/2019 – 08/2020
City of Bozeman, MT	Community Development Fee Review Study	09/2020 – 04/2021
City of Bozeman, MT	Engineering Review Fee Study	07/2023 – 05/2024
City of Bozeman, MT	Infrastructure Review Fee Study	09/2024 – Present

Client	Worked Performed	Dates
City of Bridgeport, CT	Building Permitting Process Analysis	05/2024 – 12/2024
City of Cedar Park, TX	Public Works and Utilities Staffing Model Analysis	02/2023 – Present
City of Detroit, MI	Housing and Revitalization Department Software Needs Assessment and Requirements Development	08/2019 – 09/2020
City of Fernandina Beach, FL	Building Department Fee Study	04/2020 – 02/2021
City of Fort Worth, TX	Structural Efficiency Study for Development and Permitting Services	06/2023 – 07/2024
City of Frisco, TX	As-Is Process Diagramming and Improvement Recommendations for Plan Review Processes Electronic Plan Review (EPR) System Selection and Implementation Oversight	05/2018 – 12/2022
City of Gainesville, FL	Building Permit Fee Study	01/2021 – 06/2021
City of Gainesville, FL	Fee Schedule Update	11/2021 – 06/2022
City of Greeley, CO	Economic Development Strategic Plan	9/2024 – Present
City of Hillsboro, OR	Permitting and Planning Software Consultation	08/2021 – 09/2023
City of Homestead, FL	Workflow and Comparative Fee Analysis	11/2015 – 07/2017
City of Irvine, CA	Community Development Permit Software Needs Assessment and Implementation Project Management Services	08/2020 – Present
City of Largo, FL	Building Permit Fee Study	03/2022 – 02/2023
City of Leander, TX	Development Process Review	01/2022 – 11/2022
City of Miami Beach, FL	Review of Regulations and Processes Relating to Development Projects	03/2023 – 09/2023
City of Midvale, UT	Permitting and Inspections System Needs Assessment	10/2020 - 03/2021
City of Pearland, TX	Facilities Division Staffing Study Services	01/2023 – 05/2024
City of Philadelphia, PA	Philadelphia Water Permit Tracking Replacement System	05/2019 – 02/2020

Client	Worked Performed	Dates
City of Plano, TX	Building Inspections Process Improvement Project	11/2021 – 04/2022
City of Puyallup, WA	As-Is Business Process Diagramming for Community Development Functions	02/2020 – 10/2022
City of Richland, WA	Community Development Business Process Review	11/2020 – 02/2021
City of San José, CA	Homeless Engagement Management Persona Identification and Process Design	11/2022 – 04/2023
City of San José, CA	Vehicle Blight Persona Identification and Process Design	11/2022 – 04/2023
City of Santa Monica, CA	Homelessness Strategic Plan	07/2023 – Present
City of Scottsdale, AZ	Planning, Permitting, and Code Enforcement System Selection and Implementation	06/2022 – Present
City of Tucson, AZ	Permitting System Implementation; Cost-of-Service Study; and Fee Schedule Redesign	12/2018 – 01/2021 03/2022 – 07/2022
City of Villa Park, CA	Citywide Fees and Charges Rate Study	10/2020 – 04/2021
City of Villa Park, CA	Public Works, Engineering, Planning, and Building Fee Study	06/2023 – 09/2024
City of Westfield, MA	Public Works Department Management and Operations Study	05/2024 – Present
City of Wilmington, NC	Community Development Implementation Project Management	02/2019 – Present
City of Woodinville, WA	Permitting Operations Improvement Implementation	07/2023 – Present
Town of Longboat Key, FL	Comprehensive Fee Study	08/2018 – 03/2019
Town of Smithfield, RI	Water and Sewer Rate Study	01/2023 – 05/2023
Town of Smithfield, RI	Utility Billing Analysis	01/2024 – 08/2022
Town of Yarmouth, ME	Community Facilitation / Public Engagement Services	05/2022 – 11/2022
Village of Schaumburg, IL	Permitting and Inspections Operational Study	02/2021 – 09/2022

Client	Worked Performed	Dates
County Clients		
Alachua County, FL	Building and Fire Permit Fee Study	08/2022 – 08/2023
Boulder County, CO	Community Planning and Permitting Strategic Plan	06/2022 – 09/2023
Clark County, WA	Environmental Public Health System Selection and Implementation Project Management	01/2022 – Present
Doña Ana County, NM	Land Management Consulting Services	06/2021 – 01/2023
Hawai'i County, HI	Standard Operating Procedure Development for the Highway Division	04/2024 – Present
Kern County, CA	Building Permits Process Improvement Services	02/2024 – Present
Lake County, CO	Community Planning and Development Fee Study	07/2023 – 12/2023
Manatee County, FL	Building and Development Services Fee Study	06/2021 – 07/2022
Pitkin County, CO	Community Development Department Process Review	08/2021 – 11/2022
Santa Clara County, CA	Development Permit Process Improvement	10/2024 – Present
Sonoma County, CA	Permit Management Review Services	05/2022 – 03/2023
Travis County, TX	Consultation Development Review Process and Fees	12/2020 – 01/2022

Commitment to the State



We take pride in the breadth and depth of our experience serving the State's local government landscape. We have completed projects with more than a dozen clients throughout the State, including those listed below. The communities **highlighted in blue, below**, are those for which we have conducted comparable cost of service analyses and fee studies. This insight into your State permitting and inspection compliance regulations will help our team provide applicable recommendations and insights during this fee

analysis study.

- Alachua County
- City of Aventura
- City of Boca Raton
- City of Boynton Beach
- City of Cape Coral
- City of Cooper City
- City of Coral Springs
- City of Fernandina Beach
- City of Fort Lauderdale
- City of Gainesville
- City of Groveland
- City of Homestead
- City of Largo
- City of Lauderdale Lakes
- City of Lauderhill
- City of Lauderhill
- City of Margate
- City of Miami Beach
- City of New Smyrna Beach
- City of North Lauderdale
- City of Ormond Beach
- City of Palm Coast
- City of Parkland
- City of Plantation
- City of Port Orange
- City of Port St. Lucie
- City of Sanibel
- City of Sarasota
- City of Tampa
- City of Zephyrhills
- Collier County
- Manatee County
- Martin County
- Miami-Dade County
- Monroe County
- Pasco County
- St. John's County
- Suwannee County
- Town of Davie
- Town of Jupiter
- Town of Longboat Key
- Village of Palm Springs
- Village of Pinecrest

References

Below, we provide reference information for three clients who can speak to the quality and satisfaction we deliver on comparable engagements.



City of Largo, Florida
Cost of Service Analysis and Fee Study
April 2022 – February 2023

Matt Butler, Assistant Building Official
727.586.7488 | mbutler@largo.com

The City of Largo engaged BerryDunn to conduct a Community Development Department Cost of Service Analysis and Fee Study, related specifically to building permits and inspections, and planning and engineering support. The focus of the project was to review all revenue generated from fees for permits and services provided by the Community Development Department's Building Division and the identified expenses associated with providing all services and to calculate percentage of full costs recovered delivering services at current fee levels. The findings outlined from conducting the cost of service analysis and fee study were used to develop updated fees, where applicable and to prepare a reserve fund balance analysis and recommendations.



Alachua County, Florida
Building and Fire Permit Fee Study
July 2022 – August 2023

Holly Banner AICP, Zoning Administrator
352.384.3184 | hbanner@alachuacounty.us

Alachua County partnered with BerryDunn to prepare a permit and inspection services fee study for the Growth Management Department's building permits and inspections special revenue fund. BerryDunn also prepared a fire safety services fee study for select fire plan review and inspection services. The analysis projects the full cost of providing Department services contained within the special revenue fund as well as select fire services. The results offered a cost recovery determination for select service categories and service types. Establishing cost recovery baselines allowed for more detailed revenue and expenditure forecasts to be developed, which served as a foundation for assessing the level of fees necessary to meet revenue requirements, sustain current operations, maintain an adequate reserve fund balance, and fund goals, initiatives, and enhanced service delivery in the future.



City of Gainesville, Florida
Department of Sustainable Development Cost of Service and Fee Study
January 2021 – June 2021 (Cost of Service); November 2021 – June 2022 (Fee Schedule Update)

John Freeland, Building Official
352.393.8640 | freelandjc@cityofgainesville.org

The City of Gainesville engaged BerryDunn to provide support with updating the methodology used to calculate building permit fees, land development fees, and other related services provided by the

Department of Sustainable Development's Building and Planning Divisions, and to perform a full cost analysis to help ensure the City is recovering the full cost for providing these services.

We reviewed services, such as building permit and land development intake, build plan review, building construction inspections, development plan reviews, zoning reviews and inspections, land reviews and inspections, and processing of other applications in order to accurately and reasonably allocate available financial and personnel resources to the services provided. BerryDunn compiled findings in a final report and cost model.

Findings and recommendations were successfully presented to the City Manager, Builders Association of North-Central Florida, and the City Commission. Subsequently, the City engaged BerryDunn to utilize the cost of service findings to develop and propose and updated master fee schedules to be adopted. The City Commission adopted the update fee schedules in June 2022.

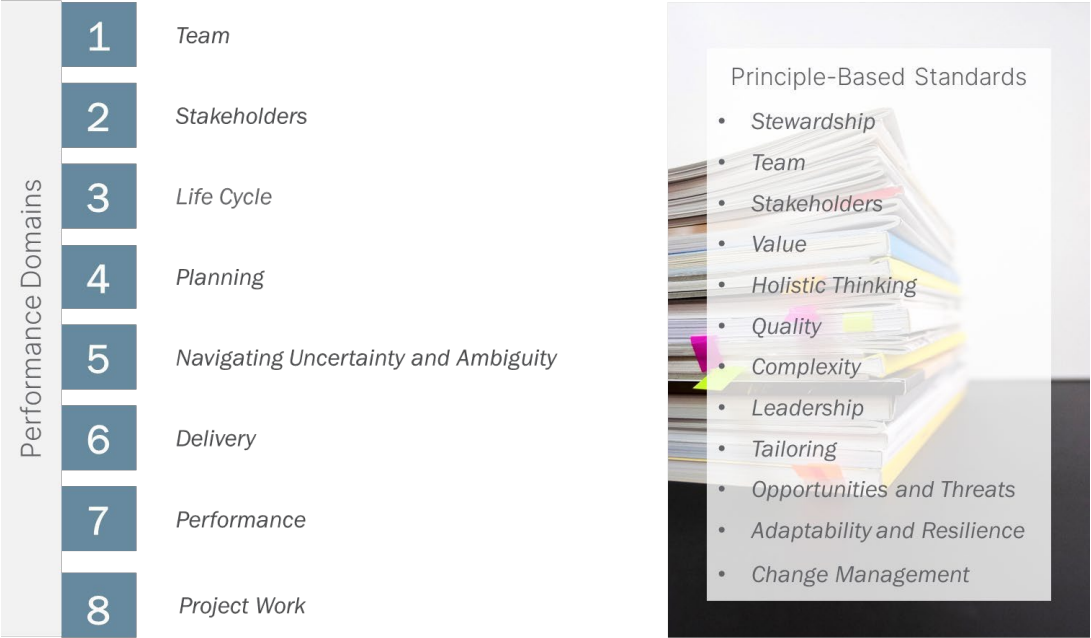
3. Project Approach

Project Management Methodology

To help ensure that project objectives are met, and initiation and completion of project work are conducted in a timely manner, each BerryDunn project is led by an experienced project manager who understands and utilizes project management best practices. Our Consulting Services Team employs project management best practices from the Project Management Institute®'s (PMI®'s) A Guide to the Project Management Body of Knowledge Guide (PMBOK® Guide).

Figure 3 illustrates the standards of project management as defined by performance domains and project delivery principles that are critical for effective delivery of project outcomes.

Figure 3: Performance Domains and Project Management Guiding Principles | PMBOK® Guide



Work Plan Overview

BerryDunn strives to be flexible when it comes to developing and executing an effective work plan. We understand that no two projects are exactly alike, and our past clients have appreciated our willingness to adapt to their needs. This mindset plays a foundational role in how we measure the success of our portfolio of similar projects.

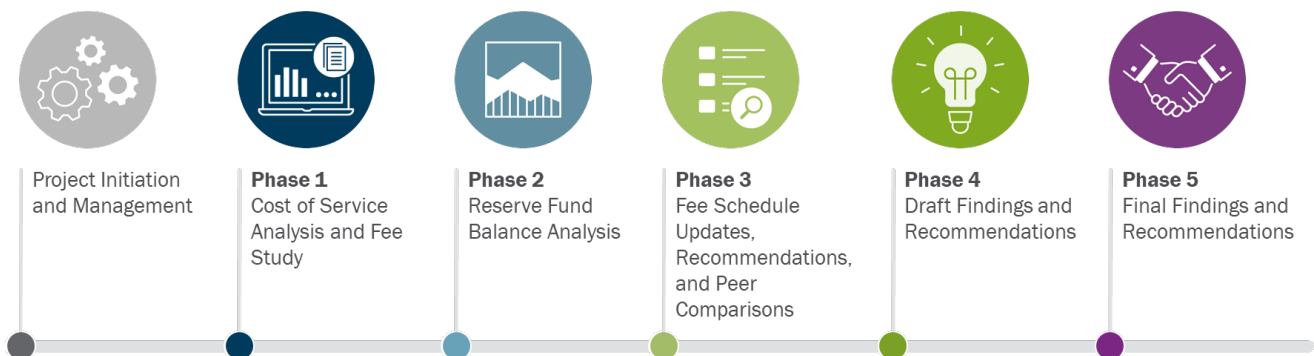
Our approach to preparing the City's Fee Assessment is outlined below and designed to incorporate consistent project management best practices with each of the City's key deliverables and tasks. Our intent is to work with staff to help ensure we make the best use of your time. Ultimately, consistent collaboration can help promote buy-in and understanding for final recommendations.

You can expect our approach to include the following attributes:

- A methodology based on our extensive experience conducting similar cost of service, cost recovery, and fee studies
- Use of standard cost accounting and activity-base costing, resource allocation methodology, weighted averages, and other standard analytical techniques to accurately determine the full cost of providing specific services
- An understanding of the importance of setting fee levels accurately to fund service delivery balanced with an understanding that fees have real-world financial impacts to customers
- Quality assurance processes that incorporate the City's review and approval of all deliverables
- Built-in project management best practices that focus on keeping the project on time, on budget, and progressing at a healthy pace for the City's stakeholders to give input in the information gathering and fact-finding process and understand final recommendations

Figure 4, below, presents an overview of our proposed approach to completing the City's desired scope of work.

Figure 4: BerryDunn's Proposed Approach



Project Initiation and Management

To establish a strong foundation for the project and help ensure a high-level of quality and communication throughout the engagement, we will utilize project management best practices based on PMI®'s PMBOK® Guide and our experience conducting similar projects with municipal and county building and development departments throughout the country.

The City can expect our team to complete the following project activities:

- ▶ Thorough project planning, including an initial planning teleconference between BerryDunn's team and applicable staff to confirm project goals, objectives, and expectations.
- ▶ Virtual kickoff meeting: Following the initial planning call, we will conduct a virtual kickoff meeting with the City project team and identified stakeholders to discuss in greater detail the relationship of the current fees and charges environment, current cost recovery levels and revenue requirements, and current citywide goals and initiatives.
- ▶ Based on the information gathered from our initial project planning call and virtual kickoff meeting, we will develop a Project Work Plan and Schedule reflecting our proposal. This will outline the major tasks, timelines, and identified milestones.
- ▶ Documentation and data review, including but not limited to current fee schedules, lists of existing permit and service types and annual volume, revenue and expenditure budgets and reports, reserve balance reports, detailed revenue reports by permit or service type, organizational chart(s) and staffing rosters, personnel salary and benefit data, and other documentation deemed important to the study.
- ▶ Biweekly Project Status Meetings, which will describe activities and accomplishments for the reporting period, risk mitigation, deliverable reviews, scheduling discussions, and more.

Deliverable 1. Project Work Plan and Schedule

Deliverable 2. Biweekly Project Status Meetings

Phase 1. Cost of Service Analysis and Fee Study

During Phase 1, our project team will virtually interview staff and stakeholders and review applicable fee schedules and budgets. We will use this information to assess the Department of Sustainable Development's (Department's) current fees and charges environment related to the building permitting process, inclusive of applicable engineering and fire review services. We will examine the customer service framework, perform a personnel review, and develop an initial cost model. Our goal will be to identify key direct and indirect resources related to Department service delivery. We will then project cost recovery per service category, per permit/service type, and where applicable and the data allow for each specific permit/service the Department provides. We will develop recommendations and recommend fees consistent with identified revenue requirements, cost recovery targets, and reserve fund balance level requirements.

The City can expect our team to complete the following project activities:

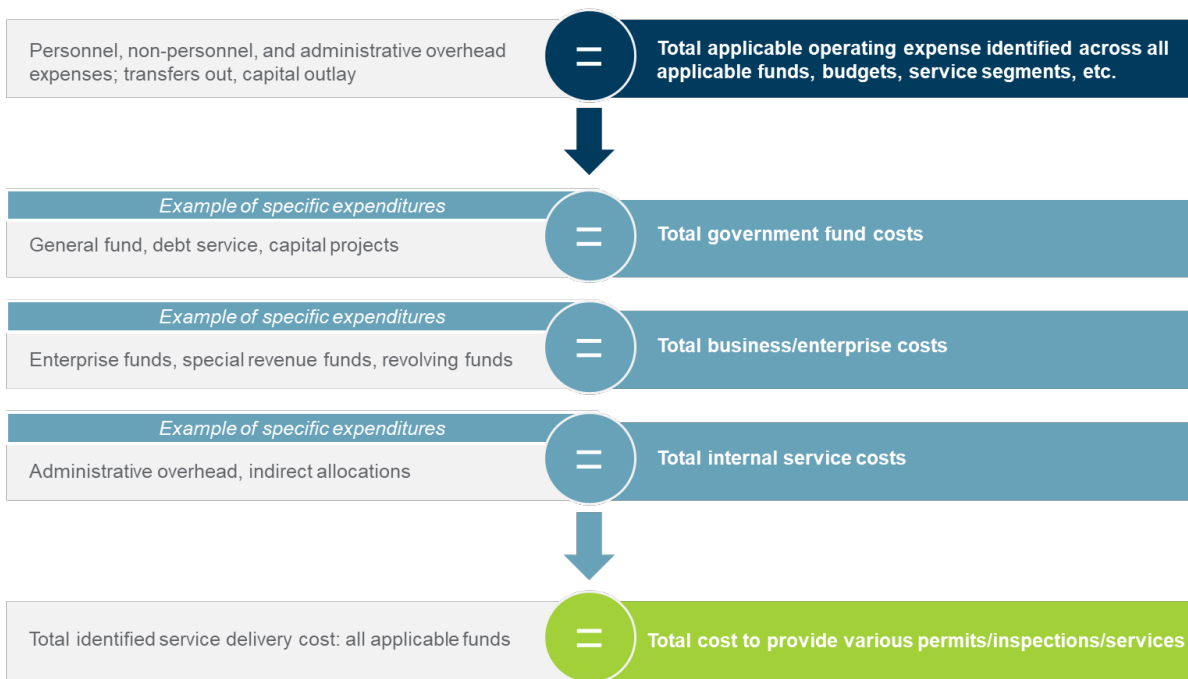
- ▶ Virtually interview staff and stakeholders
- ▶ Review applicable fee schedules, including applicable engineering and fire review fees
- ▶ Review applicable operating and capital budgets

Phase 1. Cost of Service Analysis and Fee Study

- ▶ Review revenue and expenditure reports (actuals)
- ▶ Review personnel budgets
- ▶ Project the full cost for providing services
- ▶ Project the full cost for providing services by specific service category, specific service type, and/or specific permit/service
- ▶ Recommend methodologies for calculating fees and the amount of each fee to satisfy revenue requirements and cost recovery targets, and reserve fund balance level
- ▶ Provide recommendations where it is not feasible to recover the full cost of providing a permit/service and also identify those instances where full cost recovery is attainable
- ▶ Recommend fee for services the Department currently provides but for which no fee is currently assessed

Figure 5 provides an overview of the information our project team will gather and how that will funnel into a cost model to determine cost of services. Figure 5 may not be inclusive of/applicable to all information reviewed and analyzed.

Figure 5: BerryDunn’s Cost of Service Analysis Approach



Deliverable 3. Cost of Service Analysis and Fee Study

Phase 2. Reserve Fund Balance Analysis

During Phase 2, our project team will virtually meet with applicable City staff to gain a detailed understanding of the historical, current, and projected reserve fund balance level. We will identify key direct and indirect resources related service delivery and develop projections outlining the estimated level of reserve fund balance necessary to help ensure business and service continuity. Furthermore, we will identify if current and projected reserve fund balance levels are projected to remain in compliance with the State-defined maximum fund balance level for three fiscal years.

The City can expect our team to complete the following project activities:

- ▶ Virtually interview staff and stakeholders.
- ▶ Review fund balance reserve reports and projections.
- ▶ Determine applicable direct costs: we will identify all allowable expenses that can be covered using reserve fund balance.
- ▶ Determine applicable indirect costs: we will identify all allowable expenses incurred for a common or joint purpose related to internal service delivery that can be covered using reserve fund balance.
- ▶ Determine unallowable costs: we will identify all expenses not allowable/applicable to be covered using reserve fund balance.
- ▶ Determine total cost: we will identify a total cost pool and recommend a reserve fund balance level target needed to help ensure business and service continuity and remain in compliance with the State-defined maximum fund balance level.

Deliverable 4. Reserve Fund Balance Analysis and Projections

Phase 3. Fee Schedule Updates, Recommendations, and Peer Comparisons

Utilizing the Cost of Service Analysis and Fee Study and Reserve Fund Balance Analysis completed in Phase 1 and Phase 2, our project team will identify and prioritize necessary changes to fee calculation methodologies and fee schedule structure and cost allocations, develop initial recommendations, and outline any additional, applicable areas where improvements should be considered. We will review findings, priorities, and recommendations with internal and external stakeholders during three virtual workshops.

The City can expect our team to complete the following project activities:

- ▶ Facilitate virtual workshops
- ▶ Validate fee schedule structure, fee calculation methodology, and full cost and revenue allocation methodology
- ▶ Where appropriate, demonstrate best practices and methodologies related to service delivery
- ▶ Identify other deficiencies and areas for improvement
- ▶ Develop recommendations, priorities, and implementation strategies
- ▶ Provide additional consultative recommendations
- ▶ Survey up to three comparable political jurisdictions to assess current and recommended fee levels

related to similar building permitting core services

Deliverable 5. Fee Schedule Updates, Recommendations, and Peer Comparisons

Phase 4. Draft Findings and Recommendations

We will prepare a Draft Cost of Service and Fee Study Report, which we will share with staff, applicable stakeholders as directed. We will solicit feedback and discuss, document, and include desired modifications. We find that by sharing our initial findings and report with staff and stakeholders, we are able to establish consensus, build buy-in, and promote the long-term success of the recommendations and changes. Additionally, we will provide the City with the draft cost of service model in an easily accessible Microsoft Excel format.

The City can expect our draft findings and recommendations to include the following:

- ▶ Conduct a review session to provide an overview of the full cost analysis and fee study report findings related to the current fiscal and service environment
- ▶ Revenue and expense allocations to services related to the current fiscal and service environment
- ▶ Revenue requirement estimates and revenue projections for three fiscal years
- ▶ Expense projections for three fiscal years
- ▶ Reserve fund balance level projections for three fiscal years
- ▶ Cost recovery targets
- ▶ Fee design and calculation recommendations
- ▶ Updated fee schedule(s) – structure and levels where applicable
- ▶ Additional, applicable findings and recommendations

Deliverable 6. Draft Cost of Service and Fee Study Report

Phase 5. Final Findings and Recommendations

As final project closeout and knowledge sharing activities, we will apply edits to the Final Cost of Service and Fee Study Report and Final Cost of Service Model, incorporating the City's feedback. We will review final project deliverables with staff and applicable stakeholders as directed. We find that involving staff in preparation of the final documents helps to transfer knowledge and helps ensure the successful implementation of the final recommendations.

The City can expect our team to complete the following project activities:

- ▶ Update the Cost of Service and Fee Study Report and Cost of Service Model to final
- ▶ Provide a single PDF file of the report and Microsoft Excel version of the cost model
- ▶ Virtually present final project deliverables to City staff/leadership
- ▶ Deliver one in-person presentation to the City Commission, if desired

Deliverable 7. Final Cost of Service and Fee Study Report

Deliverable 8. Final Cost of Service Model

Deliverable 9. Final Presentation(s)

Anticipated Timeline

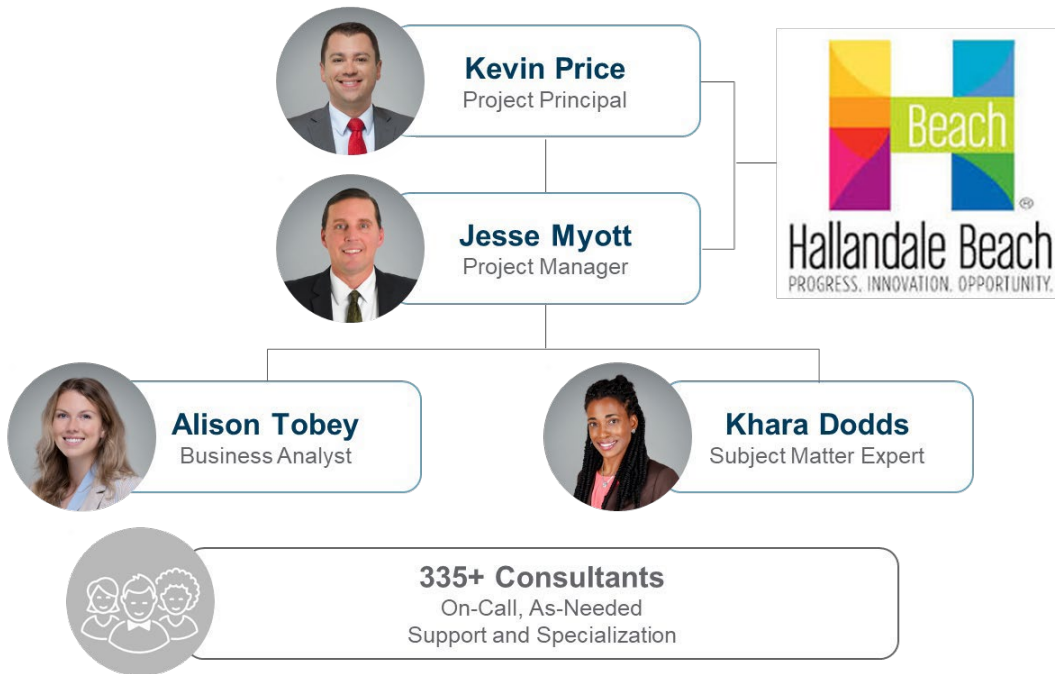
Below, we highlight our proposed project schedule for the City's requested work effort. Our hope is to begin the project in March or April 2025. That said, we are happy to adjust this schedule to best accommodate the City's needs, as appropriate.

Phase / Month	One	Two	Three	Four
Project Initiation and Management	●	●	●	●
1. Cost of Service Analysis and Fee Study	●	●	●	
2. Reserve Fund Balance Analysis		●	●	
3. Fee Schedule Updates, Recommendations, and Peer Comparisons			●	
4. Draft Findings and Recommendations			●	
5. Final Findings and Recommendations				●

4. Project Team

Our team members bring valuable perspectives from their experiences providing project planning, project management, business process improvement services, fee studies, and more. Figure 6 illustrates our team organization and leadership.

Figure 6: BerryDunn's Project Team



Roles, Responsibilities, and Qualifications

Below and on the following pages, we provide details of our project team members' roles, responsibilities, and qualifications as it relates to the City's Fee Assessment. **Our project team members' full resumes are included in Appendix A for the City's further review and consideration.**



Kevin Price, MPP, PMP®, Prosci® CCP | Project Principal
Berry, Dunn, McNeil & Parker, LLC

Kevin is a principal in our Local Government Practice Group. He leads our Community Development and Utility Operations Practice, assisting local government clients with business process improvement, fee analysis, system selection, and implementation projects.

A certified Project Management Professional® (PMP®), Kevin has extensive experience in assessing the business needs and processes of municipal clients for permitting,

inspections, planning, code enforcement, and land management functions. Kevin is also a Lean Six Sigma Green Belt, allowing him to continuously define, measure, analyze, improve, and control projects and environments for his clients. He has served as project principal on each of BerryDunn's building, permitting, and planning fee studies in the State.

As the **project principal**, Kevin will:

- Have overall responsibility for the services we have proposed to the City
- Help ensure the commitment of our firm and appropriate resource allocation
- Review and approve all deliverables in accordance with BerryDunn's quality assurance processes



Jesse Myott, MA | Project Manager
Berry, Dunn, McNeil & Parker, LLC

Jesse is a manager in our Local Government Practice Group. He has over 12 years of public-sector experience, focusing on supporting local governments with operating and capital improvement budget development and management; special fund accounting, revenue and expenditure forecasting; customer valuation; and cost of revenue analyses for municipal programs and services. Jesse has led multiple cost of service and cost allocation projects for local governments from California to Massachusetts and has conducted fee studies for community development departments in the Alachua County, Florida; City of Tucson, Arizona; City of Bozeman, Montana; and the Cities of Fernandina Beach, Largo, and Gainesville, Florida, and Travis County, Texas.

As the **project manager**, Jesse will:

- Build and maintain a productive relationship with the City
- Serve as the City's primary point of contact
- Lead our work and perform day-to-day project management and staff oversight
- Lead the analysis and development of project deliverables
- Develop and maintain the Project Work Plan and Schedule
- Provide subject matter expertise



Alison Tobey, MA | Business Analyst
Berry, Dunn, McNeil & Parker, LLC

Alison is a senior consultant in BerryDunn's Local Government Practice Group. She regularly assists our project teams in fact-finding exercises, in-person and virtual community engagement efforts, and deliverable development. She has supported a range of projects, from communitywide comprehensive planning to enterprise system needs assessment and system selection efforts. Alison has a master's degree in Global

Policy and International Affairs and prior work experience as a journalist. As a result, she is especially skilled in communication, content development, research, and analysis. Alison has served as a business analyst on similar cost of service and fee study projects, including for Alachua County, Florida; the City of Tampa, Florida; and the Town of Smithfield, Rhode Island.

As the **business analyst**, Alison will:

- Support the development of project deliverables, lead the review of existing documents and data, and synthesize findings



Khara Dodds, MCRP, AICP | Subject Matter Expert
Berry, Dunn, McNeil & Parker, LLC

Khara is a manager in BerryDunn’s Local Government Practice Group. She is an AICP-certified planner with more than 13 years of leadership experience and 20 years of experience in planning and community engagement. Prior to joining BerryDunn, she served as director of development services for the Town of Prosper, Texas; director of planning and community development for the Town of Glastonbury, Connecticut; and director of planning for the City of Hartford, Connecticut. She empowers communities, impacts lives, and makes a difference in her work and she leverages her experience in city and regional planning to assist clients as they move forward in their endeavors.

As **subject matter expert**, Khara will:

- Leverage her experience and knowledge of fee study and cost recovery best practices to provide expertise on in-scope services and assessment of fees

Additional Support | The BerryDunn Network

BerryDunn’s Consulting Services Team includes more than 335 consultants, including more than 80 Local Government Practice Group consultants who specialize in supporting public-sector clients. As needed, our project team will draw on the support of our vast pool of business analysts and subject matter experts. These consultants will provide in-depth knowledge of various aspects of local government and support the project team with efforts related to fact-finding, research, and deliverable development.

5. Proposed Fees

BerryDunn’s fixed fee for conducting the City’s Fee Assessment is **\$45,850**. Table 3 presents a breakdown of our proposed fees by project phase. We plan to use hybrid methodologies to minimize costs to the City and will bill travel expenses only as incurred.

Our proposed fee reflects the level of effort we believe is required to complete the requested scope. Other factors that contributed to this fee include:

- Our staffing plan and resource allocation, which provides the City with the appropriate number of resources and level of expertise to complete the tasks defined in the scope of work
- Our experience conducting projects of similar scope and size
- Our proposed team’s experience working together on similar projects

Table 3: BerryDunn’s Proposed Fees by Phase

	Phase	Fee
	Project Initiation and Management	\$5,610
1	Cost of Service Analysis and Fee Study – Building Permitting and Inspection	\$10,935
1.1	Cost of Service Analysis and Fee Study – Planning and Zoning Reviews	\$5,385
1.2	Cost of Service Analysis and Fee Study – Engineering Reviews	\$3,220
1.3	Cost of Service Analysis and Fee Study – Fire Reviews	\$2,850
2	Reserve Fund Balance Analysis	\$3,060
3	Fee Schedule Updates, Recommendations, and Peer Comparisons	\$7,140
4	Draft Findings and Recommendations	\$3,315
5	Final Findings and Recommendations	\$4,335
	Total Fixed-Fee Cost	\$45,850
	<i>Estimated Travel Expense, Billed Only As Incurred</i>	<i>\$1,500</i>

Our fee proposal assumes that satisfying a deliverable is based on the City’s signed acceptance. We will work with the City project manager to update our deliverables as required until they are accepted by the City. The City will not incur any additional costs associated with the process of reaching deliverable acceptance.

Appendix A. Resumes

Kevin Price, MPP, PMP®, Prosci® CCP

PRINCIPAL

BERRY, DUNN, MCNEIL & PARKER, LLC



EDUCATION AND CERTIFICATIONS

Master's degree, Public Policy and Management, Concentration in Financial Management, University of Southern Maine

Bachelor's degree, Economics and Political Science, University of Maine

Project Management Professional® (PMP®), Project Management Institute®

Prosci® Certified Change Practitioner

Lean Six Sigma Green Belt Certified

SELECT CLIENTS

Alachua County, FL

City of Boise, ID

City of Bozeman, MT

City of Fernandina Beach, FL

City of Gainesville, FL

City of Largo, FL

City of Miami Beach, FL

City of Tucson, AZ

Manatee County, FL

Town of Longboat Key, FL

Town of Smithfield, RI

Kevin Price is a principal in BerryDunn's Local Government Practice Group and leader of the Community Development and Utility Operations Practice. In this role, he assists local government clients with business process improvement, strategic and comprehensive planning, fee analysis, system selection, and implementation projects. A certified Project Management Professional® (PMP®), he has extensive experience assessing the business needs and processes of municipal clients for permitting, inspections, planning, code enforcement, and land management functions. Kevin is also a Lean Six Sigma Green Belt, allowing him to continuously define, measure, analyze, improve, and control projects and environments for his clients.

RELEVANT EXPERIENCE

Project Management: Kevin has managed large projects for some of BerryDunn's most complex local government clients, such as the City of Boston, Massachusetts; City of Detroit, Michigan; City of Philadelphia, Pennsylvania; and City of San José, California. He is adept at keeping projects on track and on schedule while meeting the dynamic and sometimes evolving needs of clients.

Fee Studies: Kevin has assisted BerryDunn clients with cost of service and comparative fee analysis projects. Kevin previously led our comparative fee analysis projects with the Cities of Fernandina Beach, Gainesville, Homestead, and Largo, Florida; Alachua and Manatee Counties, Florida; Town of Longboat Key, Florida; City of Tucson, Arizona; City of Boise, Idaho; City of Bozeman, Montana; and Town of Smithfield, Rhode Island.

Organizational Assessment: Kevin regularly helps county and municipal development services departments assess and improve their organizational structures and processes. These projects are collaborative and built upon stakeholder feedback, as well as project management and industry best practices. He recently led a permit management review process for Sonoma County, California, and he is serving as project principal on a review of regulations and processes relating to development projects for the City of Miami Beach, Florida.

Public Works: Kevin leads many of BerryDunn's projects with municipal public works departments and has a keen understanding of the services these departments provide, the stakeholder groups involved, and the processes, systems, and fees necessary for service delivery. He has led related projects for the City of Boston, Massachusetts; City of Pearland, Texas; and City of Philadelphia, Pennsylvania.

AFFILIATIONS AND MEMBERSHIPS

- City of Westbrook, ME Planning Board, 2023 – Present
- City of Westbrook, ME Sewer Commission – Member, 2021 – Present

Jesse Myott, MA

MANAGER

BERRY, DUNN, MCNEIL & PARKER, LLC



EDUCATION AND CERTIFICATIONS

Master's degree, History, San Francisco State University

Bachelor's degree, History, University of Rhode Island

Associate degree, Champlain College

AFFILIATIONS AND MEMBERSHIPS

- California Society of Municipal Finance Officers (CSMFO) (former)
- Municipal Management Association of Northern California (MMANC) (former)

SELECT CLIENTS

Alachua County, FL
City of Bozeman, MT
City of Cape Coral, FL
City of Fernandina Beach, FL
City of Gainesville, FL
City of Largo, FL
City of Port St. Lucie, FL
City of Sanibel Island, FL
City of South Portland, ME
Manatee County, FL
Town of Longboat Key, FL
Town of Smithfield, RI

Jesse Myott is a manager in our Local Government Practice Group. He brings over a decade of public-sector experience, focusing on supporting municipalities with operating and capital improvement budget development and management; special fund accounting, revenue and expenditure forecasting; customer valuation; and cost of revenue analyses for municipal programs and services. Jesse has led multiple cost of service and fee study projects for local governments across the country.

RELEVANT EXPERIENCE

Fee Studies: Jesse has authored highly complex and sensitive fee studies, created detailed subsidy analyses, and developed cost recovery models as well as water and sewer rate setting models for municipalities across the country, most recently for the City of Bozeman, Montana; City of Raleigh, North Carolina; Town of Smithfield, Rhode Island; the Cities of Gainesville and Largo, Florida; and the Counties of Alachua and Manatee, Florida.

Finance: Jesse brings over a decade of public-sector experience. In addition to being an adept municipal finance professional, Jesse is particularly accomplished in public works and engineering budget development and delivery, as well as capital improvement project budget development and delivery. Prior to joining BerryDunn, he served as financial analyst and management analyst for the Cities of South San Francisco and Daly City, California, respectively.

Process Analysis and Improvement: Jesse is an experienced municipal finance and management professional with over a decade of experience serving in many local government areas, both as an analyst and in senior management roles. His municipal business process knowledge extends through city administration, public works, water delivery and waste collection services, solid waste collection, public safety, economic development and redevelopment, library and recreation services, human resources, capital improvement program development, facility planning, compensation and benefits analysis, and citywide operating budget planning, monitoring, and delivery.

Utilities Operations: Jesse has years of utility operations experience, specifically in water and sewer utility management. This experience includes operating and capital improvement budget development and delivery, rate setting, water distribution infrastructure finance planning, and collection infrastructure finance planning. Prior to joining BerryDunn, Jesse served as director of finance and administration for the public works department as well as acting superintendent of public works for an interim period.

PUBLICATIONS AND PRESENTATIONS

- Massachusetts Recreation and Park Association (MRPA) Annual Conference Speaker 2015 – Cost Recovery Methods

Alison Tobey, MA, LSSGB

SENIOR CONSULTANT

BERRY, DUNN, MCNEIL & PARKER, LLC



EDUCATION AND CERTIFICATIONS

MA, Global Policy and International Affairs, University of Maine

Bachelor's Degree, Journalism, University of Maine

Lean Six Sigma Green Belt (LSSGB)

AFFILIATIONS AND MEMBERSHIPS

- American Planning Association (APA) Northern New England Chapter
- Historic Preservation Commission, City of Biddeford, ME

SELECT CLIENTS

Alachua County, FL

City of Boise, ID

City of Miami Beach, FL

City of South Portland, ME

City of Tampa, FL

Doña Ana County, NM

Town of Smithfield, RI

Alison Tobey is a senior consultant in BerryDunn's Local Government Practice Group. In this role, she assists local government clients with strategic and comprehensive planning, organizational assessment, business process improvement, and system selection projects. Her passion for helping others guides her work. Her consulting experience has afforded her the opportunity to help clients connect with stakeholders and create actionable recommendations to better serve their organizations and their communities. She leverages her prior experience as a journalist to provide clear, understandable, and thoughtful deliverables to support client needs.

PROJECT EXPERIENCE

Research and Analysis: Alison regularly supports clients by conducting primary research and analysis on an array of topics. Her approach to research and analysis is informed by her advanced global policy and international relations degree, as well as her experience as a news reporter. She approaches research tasks in a manner that considers clients' larger issues, goals, and objectives, and develops clear, concise, and thorough results and analyses.

Deliverable Development: Alison supports project teams by assisting in the timely development of project deliverables. Her experience includes developing reports detailing an organization's current business processes and providing opportunities for improvement, utilizing Microsoft Visio to accurately diagram business processes, drafting sections of an organization's comprehensive plan, and supporting facilitation and creation of community engagement events.

Stakeholder Engagement: Alison excels at leading stakeholder interviews and supporting focus groups. She leverages her prior experience as a journalist, as well as her strong written and verbal communication skills. She supports virtual engagement efforts, social media campaigns, and content creation.

Comprehensive Planning: Alison regularly supports comprehensive planning initiatives for New England communities. She assists with planning, facilitation, and notetaking during community visioning sessions and events, as well as with fact-finding activities. She also helps draft current state analyses, policy recommendations, and final plan content.

Process Diagramming and Improvement: Alison has assisted BerryDunn clients with process improvement projects as part of system replacement projects and as standalone projects. She assists with process diagramming of current and future state processes, as well as providing recommendations for overall process improvement.

Organizational Assessment: Alison regularly helps development services departments assess and improve their organizational structures and processes. She assists in fact-finding, conducting interviews with stakeholders, peer community benchmarking, and providing recommendations for improvement.

Khara Dodds, AICP, MCRP

MANAGER

BERRY, DUNN, MCNEIL & PARKER, LLC



EDUCATION AND CERTIFICATIONS

Master's degree, City and Regional Planning, Rutgers University

Bachelor's degree, Urban Studies/Africana Studies, Rutgers University

The American Institute of Certified Planners (AICP)

Equitable Community Change Certificate, eCornell

Institute of Cultural Affairs (ICA) Technology of Participation® (ToP®), Facilitation Methodology

AFFILIATIONS AND MEMBERSHIPS

- BerryDunn CEO Council on DEIBA, Systemic Barriers Subcommittee; Taskforce on ESG; and Embrace Employee Resource Group, Co-Chair
- APA, Texas Chapter, DEI Committee Member
- Texas Association of Community Development Corporations

SELECT CLIENTS

City of Fort Worth, TX

City of Pearland, TX

City of Leander, TX

City of Miami Beach, FL

City of Woodinville, WA

Orange County, NC

Khara Dodds is a manager in BerryDunn's Local Government Practice Group. She is an AICP-certified planner with more than 13 years of leadership experience and 20 years of planning and community engagement experience. She believes in the potential of community development to empower communities and positively impact quality of life. Khara leverages her experience in city and regional planning to assist clients as they assess existing policies and processes, collect and evaluate stakeholder input, and identify and implement recommendations for improvement.

RELEVANT EXPERIENCE

Community Development: Prior to joining BerryDunn, Khara was director of development services for the Town of Prosper, Texas; director of planning and community development for the Town of Glastonbury, Connecticut; and director of planning for the City of Hartford, Connecticut. In Prosper, she oversaw building, code compliance, and planning functions. In Glastonbury, she oversaw community development, health and fire code compliance, planning, and building functions. In these roles, she collaborated with engineering and public works functions and served as a liaison to land use boards and commissions. She led dynamic teams through all facets of community development, including, for instance, managing the plan review process of large-scale development projects, initiating the planning process for affordable housing, and leading sustainability certification efforts. She prepared design guidelines, regulation amendments, and a multi-faceted community engagement program to get input from residents, the development community, property owners, and board/commission members.

Engagement: Khara is a skilled facilitator, trained in the ICA ToP® facilitation methodology, and often leads participant engagement. She recently led community interviews and forums for the City of Port Arthur, Texas, strategic planning effort. She has provided similar engagement support on a homelessness strategic plan for the City of Santa Monica, California, and a strategic plan for the Santa Clara County, California, Consumer and Environmental Protection Agency (CEPA).

Diversity, Equity, and Inclusion (DEI): Khara has a demonstrated commitment to applying a DEI lens to departmental analyses and embedding DEI into engagement strategies. She is a member of BerryDunn's CEO Council on Diversity, Equity, Inclusion, Belonging, and Accessibility (DEIBA) systemic barriers subcommittee and is certified in Equitable Community Change through eCornell University. She supports DEI efforts through the APA, Texas Chapter, DEI Committee. In the public sector, she led multiple community equity projects, recommended the declaration of racism as a public health crisis, led affordable housing initiatives, worked with underserved neighborhoods on improvement and revitalization, and secured economic development incentives for large development projects. She is also a member of BerryDunn's Taskforce on Environmental, Social Responsibility, and Governance (ESG).

“BerryDunn” is the brand name under which Berry, Dunn, McNeil & Parker, LLC and BDMP Assurance, LLP, independently owned entities, provide professional services in an alternative practice structure in accordance with the AICPA Code of Professional Conduct. BDMP Assurance, LLP is a licensed CPA firm that provides attest services, and Berry, Dunn, McNeil & Parker, LLC, and its subsidiary entities provide tax, advisory, and consulting services.

Berry, Dunn, McNeil & Parker, LLC provides staff and other administrative resources to BDMP Assurance, LLP. If engaged, BDMP Assurance, LLP will lease professional and administrative staff, both of which are employed by LLC, in performing its services. These individuals will be under the direct control and supervision of BDMP Assurance LLP, which is solely responsible for the performance of our engagement.

The entities falling under the BerryDunn brand are independently owned and neither entity is liable for the services provided by the other entity. Our use of the terms “our Firm” and “we” and “us” and terms of similar import denote the alternative practice structure of Berry, Dunn, McNeil & Parker, LLC and BDMP Assurance, LLP.

This proposal is the work of BerryDunn and is in all respects subject to negotiation, agreement, and signing of specific contracts.

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