

**Proposal to Conduct a Building Department and  
Land Use Process Review**

**VILLAGE OF MAMARONECK, NEW YORK**



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## **LETTER OF TRANSMITTAL**



July 26, 2017

Mr. Daniel J. Sarnoff  
Assistant Village Manager  
Village Hall at the Regatta  
123 Mamaroneck Avenue  
Mamaroneck, NY 10543

Dear Mr. Sarnoff:

The Matrix Consulting Group is pleased to present our response to your Request for Proposals to conduct a Building Department and Land Use Process Review for the Village of Mamaroneck. This proposal is based on our review of the RFP, our background research on the Village, and our extensive experience evaluating community development departments in the northeast and around the country.

Our staff has extensive local government management consulting experience individually and working together as a project team for over a decade. The members of our team have conducted similar development review and construction inspection assessments for over 200 clients. The following points summarize this experience:

- We have conducted studies targeted specifically at evaluating and improvement development review and inspection services. All of these included an evaluation of as is and future state processes. Our most recent and comparable studies are contained in the following table. As the table shows, our firm recently conducted evaluations of several Florida community development departments and their development review processes.

**Albany, New York**  
Arlington, Virginia  
Blacksburg, Virginia  
Burlington, Vermont  
Coral Gables, Florida  
Cupertino, California  
DeKalb County, GA  
Des Moines, Washington  
Downey, California  
East Point, Georgia  
Flower Mound, Texas

Ft. Myers, Florida  
Greenville, South Carolina  
Gwinnett County, Georgia  
Hanover County, Virginia  
Hilton Head Island, SC  
Johnson City, Tennessee  
Kissimmee, Florida  
Lawrence, Kansas  
Lee's Summit, Missouri  
Los Angeles, California  
Manatee County, Florida

Oceanside, California  
Oro Valley, Arizona  
Redlands, California  
San Francisco, California  
San Jose, California  
Santa Monica, California  
Southlake, Texas  
Springfield, Massachusetts  
Sunrise, Florida  
West Palm Beach, Florida  
Westminster, Colorado

As the table shows, we recently completed a study for Albany (NY) in an evaluation of their Department of Building Regulation and Codes (Building, Zoning and Codes). We are currently evaluating building inspection in Boston (MA). Finally, we recently completed a study of the Public Works Department in nearby White Plains.

- Our proposed project team has conducted reviews of building department and development services functions as part of organization-wide studies including the following illustrative and recent list of agencies in New York and elsewhere:

Albuquerque, New Mexico	Johnson County, Kansas	Raymore, Missouri
Avon, Connecticut	Lathrop, California	Roseville, California
Barstow, California	Monroe County, Michigan	Spokane, Washington
Brattleboro, Vermont	Monrovia, California	Sunnyvale, California
Franklin Township, New Jersey	Montpelier, Vermont	Walnut Creek, California
Fort Morgan, Colorado	Niles, Illinois	Waltham, Massachusetts
Goodyear, Arizona	Orleans, Massachusetts	

- We have proposed an experienced consultant to lead this study. Alan Pennington has over 20 years of combined local government and consulting experience and leads our East Coast practice. He is a member of the American Planning Association (APA), International Code Council (ICC), and the American Association for Code Enforcement (AACE).

In all of our studies of community development departments, we utilize a comprehensive, detailed and interactive set of approaches. These approaches are comprised of the following elements:

- Detailed analysis based on intensive data collection and extensive interviewing by analysts who understand building permit and land entitlement service delivery.
- Extensive qualitative and quantitative analysis of all aspects of operations which provides a clear audit trail of the cost-effectiveness of the current organization, staffing, processes, technology, and operations as well as alternatives.
- Evaluation of operations and services in the context of 'best practices'.
- An interactive study process designed to maximize the potential for implementation of study recommendations once the project is completed.

By signing and submitting this proposal, I affirm that all information provided in our submittal is true and accurate. If I can answer any questions, please contact me at the letterhead phone and address or via e-mail at [rbrady@matrixcg.net](mailto:rbrady@matrixcg.net). Also, I invite you to visit our web site, at [www.matrixcg.net](http://www.matrixcg.net).

  
**Matrix Consulting Group**

Richard Brady  
President

# **1. EXPERIENCE AND EXPERTISE IN DEVELOPMENT OF SIMILAR REPORT**

## 1. EXPERIENCE AND EXPERTISE IN DEVELOPMENT OF SIMILAR REPORT

This study requires consultants who not only have extensive experience in conducting process documentation and evaluation, but who are subject matter experts in the evaluation of development review and inspection functions. Alan Pennington, Vice President, will serve as our project manager and lead analyst on this engagement. Mr. Pennington leads our Community Development practice and has been involved in all of our development review projects in this service area over the last nine years.

We have conducted studies targeted specifically at evaluating and improvement development review and inspection services. All of these included an evaluation of as is and future state processes. Our most recent and comparable studies are contained in the following table. As the table shows, our firm recently conducted evaluations of several Florida community development departments and their development review processes.

<b>Albany, New York</b>	Ft. Myers, Florida	Oceanside, California
Arlington, Virginia	Greenville, South Carolina	Oro Valley, Arizona
Blacksburg, Virginia	Gwinnett County, Georgia	Redlands, California
Burlington, Vermont	Hanover County, Virginia	San Francisco, California
Coral Gables, Florida	Hilton Head Island, SC	San Jose, California
Cupertino, California	Johnson City, Tennessee	Santa Monica, California
DeKalb County, GA	Kissimmee, Florida	Southlake, Texas
Des Moines, Washington	Lawrence, Kansas	Springfield, Massachusetts
Downey, California	Lee's Summit, Missouri	Sunrise, Florida
East Point, Georgia	Los Angeles, California	West Palm Beach, Florida
Flower Mound, Texas	Manatee County, Florida	Westminster, Colorado

As the table shows, we recently completed a study for Albany (NY) in an evaluation of their Department of Building Regulation and Codes (Building, Zoning and Codes). We are currently evaluating building inspection in Boston (MA). Finally, we recently completed a study of the Public Works Department in nearby White Plains.

Our proposed project team has conducted reviews of building department and development services functions as part of organization-wide studies including the following illustrative and recent list of agencies in New York and elsewhere:

Albuquerque, New Mexico	Johnson County, Kansas	Raymore, Missouri
Avon, Connecticut	Lathrop, California	Roseville, California
Barstow, California	Monroe County, Michigan	Spokane, Washington
Brattleboro, Vermont	Monrovia, California	Sunnyvale, California
Franklin Township, New Jersey	Montpelier, Vermont	Walnut Creek, California
Fort Morgan, Colorado	Niles, Illinois	Waltham, Massachusetts
Goodyear, Arizona	Orleans, Massachusetts	

The following table provides summary information requested for the most recent and relevant contracts for the firm.

Client	Abstract
<p><b>Albany, New York</b></p> <p><b>Assessment of the Department of Buildings and Regulatory Compliance (2015)</b></p> <p><b>Reference Contact:</b> Matthew Peter, Executive Director Albany Parking Authority Formerly, Mayor's Chief of Staff 25 Orange Street Albany, NY 12207 518.434.8886 <a href="mailto:mpeter@parkalbany.com">mpeter@parkalbany.com</a></p>	<p>This assessment included an evaluation of the operational practices, staffing allocations, and organizational structure of the Department of Buildings and Regulatory Compliance. While the study included an assessment of all functional areas, a key area of review was code enforcement operations. The key service areas evaluated included building permitting and inspections, zoning enforcement, and property compliance. Recommendations included the implementation of a new staffing approach, workload and performance metrics for key service areas, a modified organizational structure, and improved process flows between the Department and other City departments to increase service to the public. Opportunities to enhance and increase public education and staff training were also principal improvement opportunities identified for implementation.</p>
<p><b>Blacksburg, Virginia</b></p> <p><b>Assessment of the Development Process (2016)</b></p> <p>Anne McClung Director, Planning &amp; Building 540.443.1301 <a href="mailto:amcclung@blacksburg.gov">amcclung@blacksburg.gov</a></p>	<p>This study encompassed a comprehensive assessment of the administrative development review process, building permit review and inspections, and engineering reviews. The goals of the study were to develop recommendations to ensure the Town provided consistent, predictable, and best-in-class service to customers. Key recommendations included: adopting specific performance targets for each permit type, scheduling building inspections within 1 day of request, expansion of public information and interaction with customers, improvements to the pre-application meetings, conducting a completeness review prior to application acceptance, and issuance of a consolidated review letter outlining all review comments from departments. Additionally, recommendations were made to enhance technology utilization of the existing system including laptop / tablet use for all field inspections and the acceptance of electronic signatures to enable online processing of selected applications / permits.</p>
<p><b>East Point, Georgia</b></p> <p><b>Analysis of the Development Review and Permitting Process (2017)</b></p> <p>Geneasa Elias, AICP Special Projects Coordinator Office of the City Manager 404.270.7026 <a href="mailto:gelias@eastpointcity.org">gelias@eastpointcity.org</a></p>	<p>This study evaluated all aspects of the development review and permitting process and additionally included a review of fees charged for permitting services. Key recommendations included: establishing a Project Manager to oversee process, establishing review timeframes and standard monthly reports on performance in meeting the adopted targets, implementation of a completeness review, establishing of standard review comments, increasing customer education and interaction to increase public awareness of submittal requirements, creation of a development guide, conducting an RFP process to select a new permitting system that included electronic plan processing features, and minor modifications to the fee schedule.</p>



Client	Abstract
<p><b>Redlands, California</b></p> <p><b>One-Stop Permitting Center Evaluation (2016)</b></p> <p><b>Reference Contact:</b> Karen Peterson Planning Manager 909.798.7555 x4750 <a href="mailto:kpeterson@cityofredlands.org">kpeterson@cityofredlands.org</a></p>	<p>This study included a comprehensive evaluation of the land entitlement and permitting approval processes for the City of Redlands. A particular focus area was on methods to enhance customer service, public education regarding requirements, and create a more effective permitting center. Key recommendations included modification of public education materials regarding requirements, changes in positions allocated to provide services, further consolidation of staff into a more centralized one-stop permitting center, and establishment of time review and permit issuance standards for all permit types. This study included extensive public input and also a review of preliminary recommendations with the local chamber of commerce who fully supported the recommendations at the Council meeting where the report results were presented to the City.</p>
<p><b>Downey, California</b></p> <p><b>Development Review Process Study (2016)</b></p> <p>Aldo Schindler Director of Community Development 562.904.7151 <a href="mailto:aschindler@downeyca.org">aschindler@downeyca.org</a></p>	<p>This study examined the entire development review process including zoning and land use, building permitting and inspections, and associated reviews conducted by engineering, fire and external entities. The study evaluated processes, staffing levels, organizational structure, and technology. A key focus of the study was ensuring a high level of customer service. Key recommendations included: modifications to staffing allocations, implementation of a permit technician position at the one-stop counter, enhanced technology use to streamline processes and increase staff efficiency, implementation of training programs for staff, transferring the Building Official from a contractual position to a city staff position and enhancing access to online information regarding application requirements.</p>

## **2. EXPERIENCE WITH PROJECTS FOR SIMILARLY-SIZED COMMUNITIES**

## 2. EXPERIENCE WITH PROJECTS FOR SIMILARLY-SIZED COMMUNITIES

The Matrix Consulting Group has experience in conducting analyses of building department and Land Use Board operations in small, medium and large communities. The Village of Mamaroneck has a population just under 19,000. Our firm has conducted similar projects for communities of relatively similar populations, including those included in the table below.

Client	Abstract
<b>Brattleboro, Vermont</b> <b>Population 18,861</b> <b>Organizational Study of Town-wide Operations</b>	The Matrix Consulting Group analyzed all departmental operations, including the Planning Department, which was responsible for permitting, and interacted with a variety of external agencies, including the Development Review Board, Planning Commission, Agricultural Advisory Committee and others. The project team recommended the purchase and installation of an automated permitting system and increasing the fees for processing current planning applications.
<b>Des Moines, Washington</b> <b>Population 30,687</b> <b>Management Study of the Building Department</b>	The purpose of this study was to provide assistance to the City in reviewing existing development review practices, policies, procedures, and resources with a focus on developing recommendations to improve the overall services, including customer service, provided by the City to the customers of the Building Division. Recommendations included enhancing the dialog between the Building Department and the construction services customers of the City through e-mail, customer surveys, development of a "How to" manual, posting common plan check corrections on line, and other enhancements to communications. The Matrix project team also recommended increasing training for all staff directly involved in development review; instituting a resubmittal fee; establishment of formal plan review targets for staff, and many others.

Client	Abstract
<p><b>East Palo Alto, California</b></p> <p><b>Population 28,155</b></p> <p><b>Management Study of the Community Development Department</b></p>	<p>This project included an analysis of each of the divisions of the Community Development Department, one of which was the Building Services Division. Our consultants analyzed the staffing requirements of the Division, and recommended maintaining the current level of staffing for the immediate future for inspectional staff and permit technicians. We also recommended contracting for structural plans review; enhancing the City's web site to provide a more customer-friendly experience; raise building permit fees to cover costs; increase the number of permits issued over the counter, as well as other recommendations.</p>
<p><b>Half Moon Bay, California</b></p> <p><b>Population 11,306</b></p> <p><b>Management Study of the Planning Department</b></p>	<p>The Matrix Consulting Group conducted a comprehensive organization and management analysis of the Planning Department's existing operations, service levels, and staffing levels. Recommendations included development of standard conditions of approval to guide staff in the processing of land entitlement permits; establishment of cycle time objectives for land entitlement permits; development and adoption of policies and procedures; the formal planning and scheduling of permit applications processed by the permit staff in the automated information system as well as many others.</p>
<p><b>Hilton Head Island, South Carolina</b></p> <p><b>Population 37,099</b></p> <p><b>Management Study of the Development and Construction Permitting Processes</b></p>	<p>This study involved the analysis of the range and extent of services provided by the Planning, Building and Fire Codes, Engineering and Fire departments relative to their development review and construction permitting processes. Recommendations included modification of the permit tracking software to better support departments in monitoring work activities; enhancing the use of laptops by field inspectors; authorization of an additional plans examiner position, increasing the number of permits issues over the counter; automation of daily inspection schedules, and many others.</p>

Client	Abstract
<b>Lake Oswego, Oregon</b>  <b>Population 36,397</b>  <b>Management Study of the Community Development Department</b>	This project involved an analysis of the full Community Development Department, which included the Building and Permit Center Division. Our recommendations included adding a second Plans Examiner position; expansion of the use of the automated permit information system to enable applicants to complete and pay for a permit application on line; increasing the use of Permit Technicians to perform over the counter plan checks for minor building permits; developing plan checklists and posting permit cycle times on the web site
<b>Montpelier, Vermont</b>  <b>Population 7,855</b>  <b>Management Assessment of City Operations</b>	The Matrix Consulting Group conducted an analysis of all city operations, including the Planning Department, which served as the lead City agency in the review of discretionary permits. Recommendations included reallocating the building, permitting and inspection functions from the Fire Department to the Community Development Department; procuring and implementing an automated permitting system; reviewing fees for service, and others.

**3. ABILITY TO ACCOMPLISH PROJECTS IN A  
TIMELY MANNER**

### **3. ABILITY TO ACCOMPLISH PROJECTS IN A TIMELY MANNER**

The Matrix Consulting Group takes pride in our ability to provide our clients not only with useful and implementable recommendations to improve operations, but in our ability to provide these in a timely manner in accordance with schedules that are outlined at the beginning of our projects. We encourage you to contact our references, provided in Section 1 of our proposal, who will attest to our timeliness and quality of results.

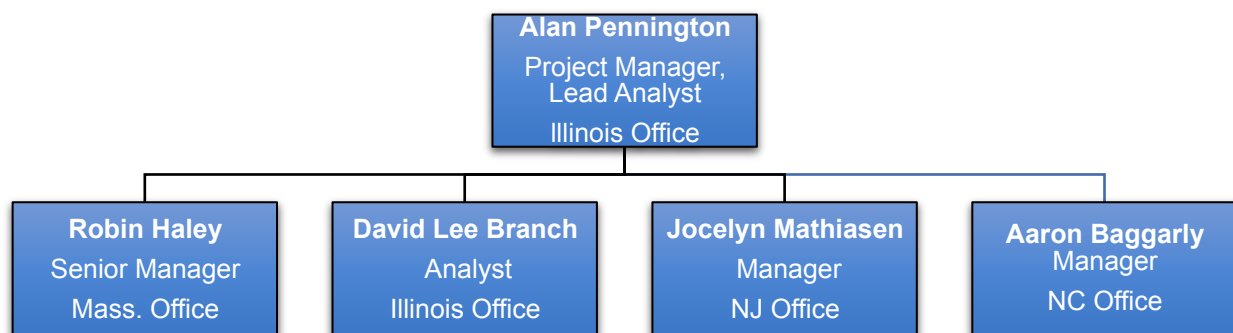
#### **4. QUALIFICATIONS OF PEOPLE AND RESOURCES ASSIGNED TO PROJECT**



## 4. QUALIFICATIONS OF PEOPLE AND RESOURCES ASSIGNED TO PROJECT

This engagement requires consultants who have extensive experience in evaluating Building Department functions and who are subject matter experts in the industry. As such, we have proposed a very experienced project team, as shown below.

**Village of Mamaroneck  
Proposed Project Team**



Summaries of the experience of our proposed project team are provided below, with more detailed resumes for the project team presented at the end of this section.

- **ALAN PENNINGTON** – Mr. Pennington is a Vice President with the Matrix Consulting Group and has been with the firm since 2005. He has been with the firm since 2005. He has over 15 years of experience as a manager in the public sector in Illinois and Maine before joining Matrix. His experience conducting studies involving development review and inspections studies includes Cary (NC), Coral Gables (FL), Cupertino (CA), Dayton (OH), DeKalb County (GA), Des Moines (WA), DeKalb County (GA), Flower Mound (TX), Franklin Township (NJ), Greenville (SC), Gwinnett County (GA), Hanover County (VA), Hilton Head Island (SC), Johnson City (TN), Johnson County (KS), Kissimmee (FL), Lawrence (KS), Lee's Summit (MO), Little Rock (AR), Manatee County (FL), Mt. Lebanon (PA), Orland Park (IL), Rancho Mirage (CA), Rancho Palos Verdes (CA), Roseville (CA), San Jose (CA), Springfield (MA), Sunrise (FL), West Palm Beach (FL), and Westminster (CO). Mr. Pennington is a member of the American Planning Association, International Code Council, American Association for Code Enforcement, and the International City/County Management Association. Mr. Pennington has a BA (Public Management) and MPA from the University of Maine. ***Mr. Pennington would serve as the Project Manager and Lead Analyst for this engagement.***

- **ROBIN HALEY** – Mr. Haley is a Manager with the Matrix Consulting Group, and has over 28 years of consulting experience in the public sector covering a wide spectrum of functions and issues. Mr. Haley's career has included assignments as consultant and project manager on over 100 operational, organizational and management improvement studies nation-wide. He has conducted studies of development review functions for the following clients: Beaufort County (SC), East Chicago (IN), Gary (IN), Hammond (IN), Hyattsville (MD), Livingston County (MD), Monroe County (FL), Nashville-Davidson County (TN), Peoria (AZ), Roswell (GA), Santa Monica (CA), and Waltham (MA). He holds a B.S. in Industrial Management from the Georgia Institute of Technology and an M.B.A. in Finance from Georgia State University. ***Mr. Haley will serve as a Senior Analyst on this engagement.***
- **JOCELYN MATHIASSEN** is a Manager with Matrix Consulting Group and brings over 15 years of consulting and public sector experience at the local and state levels. She is based in New Jersey. Her primary work areas include streamlining municipal operations to enhance customer service and efficiencies, often in areas that cross departmental lines. Most recently she served as Director of Permitting and Land Use for the city of Milford, Connecticut. Ms. Mathiasen's recent clients involving review of code enforcement and development review functions include: DeKalb County (GA), Kissimmee (FL), Los Angeles (CA), and Westminster (CO). She received a Master of Public Policy from Harvard University and a BA in Government from Oberlin College. ***Ms. Mathiasen will serve as a Senior Analyst on this engagement.***
- **AARON C. BAGGARLY, AICP** is a Manager with the Matrix Consulting Group and is part of our General Consulting and Public Safety Divisions. Mr. Baggarly has extensive experience in organizational, operational, and planning studies for local, state and national agencies. Mr. Baggarly most recently worked for the City of Stillwater, OK, and another consulting firm, prior to joining Matrix. His experience with development review and process studies include: Blacksburg (VA); Burlington (VT); Downey (CA), Fort Myers (FL); Tinley Park (IL); and East Point (GA). Mr. Baggarly maintains membership in the American Planning Association and the American Institute of Certified Planners (AICP). He has a BS in Community and Regional Planning from Appalachian State University. ***Mr. Baggarly will serve as a Senior Analyst on this engagement.***
- **DAVID LEE BRANCH** is assigned to support our senior staff in all subject areas. In his time with the firm he has contributed to dozens of studies, including Coral Gables (FL), Montgomery College (MD), Springfield Water and Sewer Commission (MA), Rockingham County (NH), DeKalb County (GA), Kissimmee (FL), Niles (IL), and Flower Mound (TX). Mr. Branch received his B.S. in Public Policy, Management, and Planning from USC, and his Masters in Secondary Education from the University of Missouri – St. Louis. ***Mr. Branch will serve as an analyst on this engagement supporting all senior staff.***

Resumes of our senior project team members are provided on the next pages.

**ALAN D. PENNINGTON**  
**VICE PRESIDENT, MATRIX CONSULTING GROUP**

**Background:** Alan Pennington is a Vice President with the Matrix Consulting Group based in the St. Louis regional office. He has been employed by the Matrix Consulting Group since 2005. Prior to that he served for over 15 years in public sector positions in Maine and Illinois. He served in Peoria, Illinois (from 1992 – 2005), in various positions including Assistant City Manager, Assistant Human Resources Director, and Labor Relations Manager.

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**Agency-Wide Studies:** Participated on project teams conducting evaluations of entire city organizations. Work scope included evaluation of business processes, service levels, policies and procedures, staffing levels, evaluation of spans of control, and reviewing alternatives options for overall organizational structure.

Albuquerque, New Mexico  
Avon, Connecticut  
Fort Morgan, Colorado  
Franklin Township, New Jersey  
Half Moon Bay, California  
Johnson County, Kansas  
Montpelier, Vermont  
Mt. Lebanon, Pennsylvania  
Orland Park, Illinois

Orleans, Massachusetts  
Peoria County, Illinois  
Rancho Mirage, California  
Rancho Palos Verdes, California  
Raymore, Missouri  
Roseville, California  
South Coast Water District, California  
University at Albany, SUNY  
Washington State Ferries

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**Community Development (Planning, Building, Code Enforcement):** Evaluated the development review and permitting processes. Conducted assessment of staffing, operations, process mapping, technology utilization, performance level assessment, and customer service.

Coral Gables, Florida  
Cupertino, California  
Dayton, Ohio  
DeKalb County, Georgia  
Des Moines, Washington  
Flower Mound, Texas  
Greenville, South Carolina  
Gwinnett County, Georgia  
Hanover County, Virginia  
Hilton Head Island, South Carolina  
Johnson City, Tennessee  
Kissimmee, Florida

Lawrence, Kansas  
Lee's Summit, Missouri (Code Administration)  
Lee's Summit, Missouri (Planning)  
Little Rock, Arkansas  
Manatee County, Florida  
Oceanside, California  
Marion County, Oregon  
San Jose, California  
Springfield, Massachusetts  
Sunrise, Florida (two studies)  
West Palm Beach, Florida  
Westminster, Colorado

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**Public Works and Utilities:** Conducted studies of full service public works departments including maintenance, fleet, traffic, engineering, and roads. Studies have focused on evaluation of maintenance management, crew sizes and staff utilization, technology, organizational structure, standard operating procedures, levels of performance management, and feasibility of shared services.

Alexandria, Virginia  
Charleston County, South Carolina  
Elmhurst Park District, Illinois  
Franklin, Tennessee (Water/Wastewater)  
Franklin, Tennessee (Fleet Management)  
Milwaukee, Wisconsin

Missouri Dept. of Conservation (Asst. Mgmt.)  
Nashville-Davidson County, Tennessee  
Orleans, Massachusetts  
Schaumburg, Illinois  
Washington County, New York  
White Plains, New York

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**Professional Associations:**

American Association of Code Enforcement (AACE), American Planning Association (APA), International Code Council (ICC), International City/County Management Association (ICMA)

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**ALAN D. PENNINGTON**  
**VICE PRESIDENT, MATRIX CONSULTING GROUP**

**Education:**

BA, University of Maine – Public Management; 1990.

MPA, University of Maine – Public Administration, 1992.

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**ROBIN G. HALEY**  
**SENIOR MANAGER, MATRIX CONSULTING GROUP**

**Background:** Mr. Haley has 28 years of public management consulting experience, with a primary emphasis on public works related services. This includes a diverse area of experience that includes utilities, streets and highways, solid waste and recycling, rights-of-way maintenance, parks and recreation, fleet management, facilities management, and customer service management systems. Additionally, Mr. Haley has 10 years of experience as a financial analyst in the transportation and defense-contracting industries, with responsibility for budgeting and budget oversight.

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**Planning and Building:** Conducted studies of development review and growth management functions for local government. Studies included evaluations of organization structure, overlaps and duplications of functions, workflow processing, cycle times for permits, technology, fees and cost recovery.

Beaufort County, South Carolina

Monroe County, Florida

East Chicago, Indiana

Nashville and Davidson County, Tennessee

Gary, Indiana

Peoria, Arizona

Hammond, Indiana

Roswell, Georgia

Hyattsville, Maryland

Santa Monica, California

Livingston County, Michigan

Waltham, Massachusetts

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**Agency-Wide Studies:** Managed and conducted studies of city and county organizations. Scopes of work included analyses of organizational structure, management and planning, staffing, performance measurement and management, operational requirements, policies and procedures.

Alexandria, Louisiana

Hall County, Georgia

Allegan County, Michigan

Hammond, Indiana

Augusta-Richmond, Georgia

Hobart, Indiana

Beaufort County, South Carolina

Hyattsville, Maryland

Brattleboro, Vermont

Knox County, Tennessee

Brunswick, Georgia

Lake County, Indiana

Charleston County, Georgia

Lawrence, Massachusetts

Chatham County, Georgia

Maryland Transportation Authority

East Chicago, Indiana

Polk County, Florida

Effingham County, Georgia

Prescott Valley, Arizona

Fairfield, Connecticut

San Antonio, Texas

Farmington Hills, Michigan

Venice, Florida

Gainesville, Georgia

Waltham, Massachusetts

Gary, Indiana

Whiting, Indiana

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**Administrative Services:** Managed and conducted studies of internal service functions, including human resources, information technology, purchasing, risk management and finance. Scopes of services included analyses of resource requirements, workflow, customer service practices, and comparison to best management practices and peer agencies.

Ada County (ID) Highway District - Finance

Holyoke (MA) – Human Resources

Augusta-Richmond (GA) - Tax Commissioner

Knox County (TN) - Finance, Human Resources

Beaufort County (SC) - Tax Increment Financing

Las Vegas (NV) Metro Police Department – HR

Brattleboro (VT) - Town Clerk, Lister

Maryland Transportation Authority – HR, Purch.

Farmington Hills (MI) - Finance, Purchasing

Medford Housing Auth. (MA) – Purchasing, HR

Floyd County (GA) - Tax Assessor, HR

Prescott Valley (AZ) – Finance

Gainesville/Hall County (GA) – Tax Assessor, HR

Waltham (MA) - Finance, Human Resources

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**Education****B.S.** Georgia Institute of Technology, Atlanta, Georgia.**M.B.A.** Georgia State University.

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**JOCELYN MATHIASSEN  
MANAGER, MATRIX CONSULTING GROUP**

**Background:** Professional manager with the ability to lead complex projects and programs, strong written and oral communications skills, and a commitment to excellence. Experience working with local governments, businesses, development banks, and non-profits in the US and abroad. She is based in New Jersey.

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**Permitting and Use:** As department director, led the reform of the Department of Permitting and Land Use for the City of Milford, Connecticut, transforming the agency into one focused on customer service and efficiency. Consolidated planning, wetlands, floodplain management, and building review processes to reduce duplication of time and effort, cross-trained clerical staff, and developed improved educational materials and website information to reduce confusion on the part of applicants. Implemented on-line permitting for all projects. Eliminated wait lines outside of the Building department (a major source of frustration) through establishment of an on-line, virtual queue. Established electronic field inspections so that inspectors could enter results into a tablet computer on-site with the information immediately uploaded to the internet and back-end permit tracking program.

Working for the Capitol Region Council of Governments, led a consortium of ten municipalities in the development of a regional permitting software program that could be used for on-line applications as well as back-office management of the permit review process across multiple disciplines, including health and fire as well as traditional land use agencies. Worked directly with IT directors and building officials from municipalities to ensure that the system met their needs and that concerns were addressed. Led creation of the web site [www.viewmypermitct.org](http://www.viewmypermitct.org) as a portal through which permit applicants could apply, pay for, and receive permits from numerous cities.

As Assistant to the City Manager in Bellevue, Washington, worked with five review agencies (building, land use, utilities, transportation, and fire) to make the land use and permitting process more efficient and customer friendly. Conducted a detailed fee study leading to City Council approval of a revised fee schedule that was consistent across reviewing agencies and allowed for greater stability in staffing through construction cycles. Oversaw the creation of a streamlined process for review and approval of simple residential remodel projects as well as commercial tenant fit-out projects. The project resulted in measurable improvements in timelines, customer satisfaction, and staff morale. It was selected as a case study at the 2005 Innovations in Government conference in Sarasota, Florida.

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**Service Delivery:** Managed several initiatives to streamline and simplify service delivery to citizens and businesses seeking to do business with municipal government. In Bellevue, Washington led an initiative to organize and implement "Service First," combining multiple front-line services to simplify and streamline citizens' interactions with the city. Worked with all town departments to identify and address concerns related to the relocation of city operations from multiple locations to a single new downtown Civic Center. Identified opportunities to improve efficiencies and deliver better customer service through design of public areas.

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**Administrative Services:** For the city of Bellevue, Washington the Capitol Region Council of Governments in Hartford, Connecticut conducted studies of administrative functions, including budgeting, human resources, information technology, purchasing and risk management. Worked with elected officials to design and obtain approval for new procurement policies for professional services. Reviewed agency human resource benefits and, working with employees, unions, and benefits providers, identified changes to the overall benefits framework that would add value for employees while controlling costs. Reviewed outdated personnel policies, and worked with managers, employees, union officials, and elected officials to draft and obtained approval for revised policies in a broad range of areas including: internet usage, laptop security, parking and carpooling, and telecommuting. Revamped and prepared agency budget documents, resulting in CRCOG's first Government Finance Officers Association award for Excellence in Budget Preparation

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**JOCELYN MATHIASSEN  
MANAGER, MATRIX CONSULTING GROUP**

**Regionalization:** For the Capitol Region Council of Governments conducted a detailed study of opportunities for regional service sharing among Connecticut municipalities. Managed a complex grant application process that resulted in \$8.6 million in municipal Service Sharing grants for pilot projects demonstrating benefits of regional service sharing.

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**Public Presentations**

- Regional Approaches to Municipal Finance, Assessment & Central Office Functions – Office of Policy Management Conference on Municipal Shared Services in Connecticut – 2010
  - Regional On-Line Permitting - New England Association of Regional Councils Conference, Bretton Woods, NH – 2009
  - Municipal Shared Services in Connecticut – New England Association of Regional Councils, Northampton, MA – 2008
  - From Chaos to Harmony: Reforming Development Services – Transforming Local Government Conference, Sarasota, FL – 2005
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**Education**

Ms. Mathiasen received a BA in Government from Oberlin College in Oberlin, Ohio and a Master of Public Policy from Harvard University in Cambridge, Massachusetts.

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**AARON C. BAGGARLY, AICP**  
**MANAGER, MATRIX CONSULTING GROUP**

**Background:** Mr. Baggarly is a Manager with the Matrix Consulting Group and has been with our firm since the start of 2016. Mr. Baggarly is part of our General Consulting and Public Safety practices. He has over 10-years of experience in the private and public sector conducting organizational, operational, and planning studies for local, state and national agencies. Mr. Baggarly most recently worked for the City of Stillwater, OK as the Planning and Building Division Manager. He provides a system-wide approach and understanding to each project. Mr. Baggarly has performed a wide array of analysis for public sector clients. Studies provide effective and efficient recommendations focusing on a holistic approach and outcome. Mr. Baggarly is also a member of the American Institute of Certified Planners, earning this designation in 2012.

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**Community Development (Planning, Building, Code Enforcement):** Evaluated the development review, permitting, and service delivery processes of municipalities. Contributed to assessment of staffing, operations, process mapping, technology utilization, performance level assessment, and customer service.

Blacksburg (VA) - Development and Permitting  
Burlington (VT) - Permitting Review  
Downey (CA) - Development and Permitting

East Point (GA) – Permitting Review  
Fort Myers (FL) – Development and Permitting

**Master Planning:** Mr. Baggarly has performed a wide array of analysis and subsequent planning studies for public sector clients. He worked with the public and employees to develop a system wide approach to operational philosophy that has resulted in facility master plans to provide customer oriented services to the public. Work includes data collection and analysis, needs assessments, public input sessions, and master plan development.m

Berkeley County (SC)\* - Government Master Plan  
Benton County (OR)\* - Government Master Plan  
Billings (MT)\* - Courts and Government MP  
Broward County (FL)\* - Courts Master Plan  
Canyon County (ID)\* - Government Master Plan  
Colorado\* - State Capital Complex Master Plan  
Darlington County (SC)\* Courts and Government  
Franklin County (PA)\* - Government Master Plan  
Jasper County (MO)\* - Court Master Plan  
Monroe County (FL)\* - Government Master Plan

Monroe County (PA)\* - Court Master Plan  
North Carolina\* - State Offices Master Plan  
Ocean County (NJ) - Court Master Plan  
Pasco County (FL)\* - Government Master Plan  
Richland County (SC)\* - Government Master Plan  
Sunnyvale (CA)\* - Government Master Plan  
Washington County (AR)\*  
Will County (IL)\* Courts and Government MP  
Wyoming\* - State Capital Master Plan  
\*Denotes work with previous firm

**Professional Associations**

American Planning Association  
American Institute of Certified Planners (AICP)  
American Jail Association  
American Correctional Association

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**Education:**

BS, Appalachian State University – Community and Regional Planning, minor in GIS; 2007

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## **5. COST OF SERVICES**

## 5. COST OF SERVICES

We propose to conduct the project outlined in the Village's Request for Proposals for a not-to-exceed price of **\$40,000**, as is shown in the table below.

Task	PM/Lead Analyst	Senior Analyst	Project Analyst	Total
1. Profile	12	32	20	64
2. Customer Input	8	0	16	24
3. Best Practices Assessment	8	16	8	32
4. Operations and Staffing	12	32	20	64
5. Draft and Final Report	8	32	16	56
<b>Total Projected Hours</b>	<b>48</b>	<b>112</b>	<b>80</b>	<b>240</b>
Hourly Rate	\$200	\$150	\$125	
<b>Total Professional Fees</b>	<b>\$9,600</b>	<b>\$16,800</b>	<b>\$10,000</b>	<b>\$36,400</b>
Project Expenses				\$3,600
<b>TOTAL PROJECT COST</b>				<b>\$40,000</b>

## **6. COMPLETENESS AND THOROUGHNESS OF PROPOSAL**

## **6. COMPLETENESS AND THOROUGHNESS OF PROPOSAL**

We believe that the Village will find that we have addressed each of the requirements of the Request for Proposals to conduct the Building Department and Land Use Process Review, and have further demonstrated that our firm possesses the knowledge, skills and expertise to provide the Village with practical and implementable solutions.

We encourage you to contact each of the references provided in this proposal and they will attest to the usefulness of our recommendations and their ability to implement them. Although our recently-completed project in White Plains, New York was for the Public Works Department, we would be pleased to provide contact information for you to check the quality and timeliness of our work for that nearly city as well. We believe that this study provided us a firm understanding of the working environment in Westchester County, and the region generally.

## **7. ADDITIONAL INFORMATION**

## 7. ADDITIONAL INFORMATION

This section of our proposal provides background information regarding our firm, our core business focus, our operational philosophies, and our capabilities to perform the services requested by the Village of Mamaroneck.

### 1. INFORMATION ABOUT THE MATRIX CONSULTING GROUP

The Matrix Consulting Group, Ltd. specializes in providing analytical services to local governmental entities to assist them in providing highly responsive, efficient, and effective services to their customers. Our market and service focus is financial, management, staffing and operational analysis of governmental services. Our firm's history and composition is summarized below:

- We were founded in 2002. However, the principals and senior staff of our firm have worked together *as one team* for between 10 and 30 years.
- Our *only* market and service focus is management, staffing and operational analysis of local government.
- We have a workforce of 18 full-time and 8 per-diem employees.
- Our firm is headquartered in California (where we are incorporated). We also maintain regional offices in Illinois, New Jersey, North Carolina, Washington, Massachusetts, and Texas.
- This engagement will be managed from our regional Illinois Office. The location and contact information for this office is:

Matrix Consulting Group  
101 Southpointe Drive, Suite E  
Edwardsville, IL 62025  
618.692.9085

- Staff for this engagement will be allocated from the following offices: Edwardsville, IL (Alan Pennington, Project Manager / Lead Analyst and David Lee Branch, Project Analyst); New Jersey (Jocelyn Mathiasen, Project Analyst) and Massachusetts (Robin Haley, Project Analyst). For engagements such as this, over 50% of billable time is spent at the client site in interviews, data collection, observations, etc.. Only analysis and development of deliverables occurs at our office locations.
- We have a very stable workforce with minimal turnover. This has resulted in staff well trained in our methodologies and work approaches in addition to possessing extensive prior client experience on comparable studies.

We are proud of our service philosophy based on detailed analysis, as well as our customized partnership with our clients. This has resulted in high levels of implementation of our project recommendations – exceeding 85%. Our performance has resulted in many clients who have engaged us for multiple studies based upon their satisfaction with our services and our commitment to exceeding their expectations.

Our staff is experienced and effective project managers, who have technical expertise in their assigned functional areas, with proven track records of meeting project schedule and budget requirements. Every project is unique, however, and is managed according to the following essential project approaches:

- **Project Managers with functional technical expertise:** Our senior level staff is not only highly proficient project managers but also are technical experts in their assigned areas. For this engagement, the Project Manager assigned has been involved with the vast majority of the community development studies conducted by the firm and is an active member of both APA and ICC.
- **Quality Control:** Our models / process diagrams, draft reports and final reports are proofed and reviewed by a senior member of the project team to ensure accurate and quality work products and results.
- **Minimize project impacts on client staff:** The Matrix Consulting Group is mindful of workload our client's staff must perform. As a result, our approach is to work with your staff to minimize project impacts, through strong project management, clear expectations of our roles versus staff roles, and careful as well as realistic scheduling.

These factors are essential to any successfully completed analytical project for government.

## **2. FIRM QUALIFICATIONS.**

A detailed listing of the firm's qualifications, as demonstrated by prior successful studies of comparable complexity and scope, is provided in our response contained in later in this response. We are a recognized national leader in the evaluation and assessment of development review processes in the public sector management consultant field.

In each of these studies, we employ a variety of methodologies to provide services to our client including:

- **Customer surveys and focus groups** to evaluate perceptions of service delivery and opportunities for improvement.

- **Process diagramming and redesign** is utilized extensively to document current workflows, identify opportunities for streamlining or modification, and development of new “to be” process diagrams to improve services.
- **Staff engagement** to fully understand current staff roles, workloads, capabilities and constraints. Our approach to interviewing, observing and providing periodic updates to staff on our findings ensures that staff have meaningful input into the process and buy-in for the implementation of recommended changes.
- **Best practices assessments** to identify how the client compares to recognized best practices in the community development field. This allows our project team to systematically identify the strengths of the organization, and to focus our efforts on those facets of operations that are candidates for improvement.

These points represent just a few of the methodologies and approaches that we utilize in providing service to our clients when conducting community development studies.

### **3. PROJECT UNDERSTANDING.**

The Village of Mamaroneck, New York is seeking to have a comprehensive evaluation conducted of the boards under its review, as well as of its Building Department. This review will include:

- Workload analysis, to include how inspections are scheduled, managed, completed and reported.
- Analysis of the interactions between the various Boards and the Building Department, from concept through issuance of certificates of occupancy.
- Analysis of customer service and interactions, including how the Department processes and resolves complaints regarding zoning, property, maintenance, sign, and other complaints.
- The implementation and use of technology for both internal staff and external customers.
- Review of major processes, both operational and managerial decision-making, utilized to identify streamlining or improvement opportunities.

The result of this effort will be a final report and action plan that clearly identifies improvement opportunities, benefits to be gained from the change, and a timeframe and methodology for implementation.



#### **4. PROPOSED TASK PLAN.**

The following is a representative task plan for conducting a community development survey. This would be modified in consultation with the City to ensure all key areas are addressed.

##### **Task 1      Develop a Profile of Building Department Services.**

To realistically assess the Village of Mamaroneck Building Department (VMBD) and the Boards, it is important to develop some sense of where the Village is going, and the key issues which impact and shape service requirements. To develop this perspective, we plan to conduct a series of initial interviews with key Administration, Department Managers, as well as key staff that are involved, directly or indirectly, in providing services in the VMBD to identify the key factors impacting operations. Specific issues receiving emphasis by the project team would include:

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Basic service delivery goals and objectives of key service areas

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Identification of key issues impacting service delivery

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Documentation of key trends in the Village related to growth patterns and other service demand drivers

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Concerns expressed by the customers regarding the service levels provided by the VMBD

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These initial interviews will provide an opportunity to identify and isolate factors and constraints which impact current or near-term operations.

To develop a comprehensive understanding of the organization and operations of the private development, permitting, construction inspection and approval processes, we would complete the basic work steps defined below.

- Develop “current state” workflows that show the current processes as they currently are in place with details showing which departments and staff are involved in each process, whether each step is manual or automated, and the hand-offs between individuals and units, and the data required for each step.
- Interview all department staff members, focusing on such issues as:
  - Basic work responsibilities.
  - Workload and allocation by major task and work responsibility.
  - The processes utilized to deliver services.
  - Documentation of individuals’ attitudes toward strengths and improvement opportunities.
  - Level of use of existing technology.

- Interview members of the Zoning, Planning, Harbor and Coastal Zone Management Commission to understand processes, uses of technology, interactions with VMBD staff, service levels provided, and other elements of operations.
- Interview selected customers to ascertain their perspectives on the operations of the Land Use Board and VMBD operations.
- Conduct “ride-alongs” with building inspectors and code enforcement officers to ascertain how efficiently routes are developed, customer interactions, documentation of inspectional results, and to develop an understanding of the issues confronted by staff members as they conduct inspections.
- Interview staff in other functions that are essential to the provision of services by VMBD, such as Information Technology Services and Finance.

Our consultants develop formal guides for each interview that ensure that we obtain the critical information necessary to understand the organization and the issues that need to be addressed. We complement these interview guides with formal data requests that are based on years of experience in conducting analyses of building departments, and community development organizations generally. In conformance with the Village’s request, we have provided the following typical data collection list for building department studies.

<b>Data Element</b>	<b>Summary Description/Example</b>
<b>Defining Documents</b>	Electronic data (e.g., spreadsheet) showing workload over the past 5 years for permitting, planning and zoning approvals, and inspections. Include: number of permits, by type, fees collected, square footage, construction value.  Provide any data regarding turnaround times for permitting function, such as time frame from application to first review, time frame from application to issuance.
<b>Organizational Chart and Listing of External Reviewers</b>	Copy of the fee schedules for all permitting activities.
<b>Staffing Levels</b>	Spreadsheet with revenue for all permitting activities by permit type, over the past 5 years.
<b>Budget</b>	Copies of any reports used by management to track permitting performance, including data included in the budget.
<b>List of individual staff members in each division /department.</b>	Policy and procedure manuals, including any desk manuals outlining duties and responsibilities of individual staff members.

<b>Data Element</b>	<b>Summary Description/Example</b>
<b>Job Descriptions</b>	Copies of all permit application forms and accompanying instructions (only if not available online).
<b>Salary Schedule and Benefit Rate</b>	Copies of checklists used to review applications upon submittal (include checklists used by counter staff and checklists provided to applicants, if different).
<b>Workload and performance data</b>	<p>Copies of any brochures, guides, or other documents for applicants aimed at assisting them with the permitting process (that are not available on the Village website).</p> <p>Also, any newsletters or other communications that are sent by the departments or the Village related to permitting activities (that are not available on the website).</p>
<b>Fee schedule</b>	The project includes a customer survey. Provide e-mail addresses of current and recent customer of the planning and building permitting process.
<b>Revenue</b>	The project includes an employee survey. Provide a complete listing of employee e-mail addresses for all employees that would be included in the survey.
<b>Performance Reports</b>	Copies of the Village's Comprehensive Plan and any updates or modifications as well as other relevant planning documents (if not available online).
<b>Policies and Procedures</b>	Samples of comment letters (provided to the applicant) and staff reports (provided to commission). If possible, provide a number of samples for different types of projects.
<b>Permit Application Forms</b>	Sample approval letters for larger planning applications, including conditions of approval.
<b>Submittal Checklists</b>	<p>Electronic data (e.g., spreadsheet) showing workload over the past 5 years for permitting, planning and zoning approvals, and inspections. Include: number of permits, by type, fees collected, square footage, construction value.</p> <p>Provide any data regarding turnaround times for permitting function, such as time frame from application to first review, time frame from application to issuance.</p>

<b>Data Element</b>	<b>Summary Description/Example</b>
<b>Customer Education and Outreach materials</b>	Copy of the fee schedules for all permitting activities.
<b>Customer Contact info</b>	Spreadsheet with of revenue for all permitting activities by permit type, over the past 5 years.
<b>Employee contact info</b>	Copies of any reports used by management to track permitting performance, including data included in the budget.
<b>Long range plan</b>	Policy and procedure manuals, including any desk manuals outlining duties and responsibilities of individual staff members.
<b>Sample comment letters and staff report</b>	Copies of all permit application forms and accompanying instructions (only if not available online).
<b>Sample approval letter</b>	Copies of checklists used to review applications upon submittal (include checklists used by counter staff and checklists provided to applicants, if different).

Once these initial data collection activities have been completed, we will prepare a profile describing the organization of VMBD, operations, and workload patterns and outlining existing workflows. Once the profile has been prepared, it will be circulated in the Department and to the project steering committee to ensure accuracy.

***Task Result: Detailed profile of VMBD workload and service standards for Mamaroneck including as is process maps.***

## **Task 2 Obtain Customers to Identify Service Levels and Issues from Customer Perspective.**

We will provide an opportunity for stakeholders (prior and current customers) to provide input on customer service in building management processes. We propose to do that via two methods – an online survey and two customer focus group meetings. The questions addressed through these feedback processes, will be designed to:

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Elicit attitudes toward clarify and understanding of the Village processes and requirements.

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Document attitudes toward the level and quality of services provided by the Department.

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Document attitudes toward the commitment of the organization to exceptional service philosophies.

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Determine attitudes toward the adequacy of resources available to employees to deliver services.

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Identify areas of inefficiency or difficulty in accessing services from the Department.

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Document desired services, service levels or technologies desired by customers.

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The survey could be made available to all customers in the past year through an anonymous online survey tool (we use SurveyMonkey). The focus group meetings, of 10 – 12 customers each, would allow for more in depth discussion of strengths and potential improvement opportunities than a survey allows.

***Task Result: Summary of the feedback and issues acquired from the customer survey and focus group meetings with a prioritized listing of issues, concerns, and improvement opportunities outlined by participants.***

### **Task 3      Benchmark Building Department Processes against Best Practices.**

The purpose of this task would be to evaluate the VMBD processes against recognized best practices in the industry. This assessment will identify gaps between existing conditions in the Village and “best practices” and provide a valuable contribution to the development of new “to be” process improvements, service levels, or policy changes. Specific areas of comparison of the Village’s practices to those of “best management practices” will include:

- Efficiency of organizational structure, including the reasonableness of spans of control, the degree to which the structure fosters internal and external communications, the degree to which “hand-offs” between divisions is minimized, and others.
- The degree to which technology has been implemented, and is driving management decisions regarding staff deployment, training needs, scheduling.
- The sufficiency of fee levels.
- The efficiency of customer service practices.
- The comprehensiveness and usefulness of existing policies and procedures.

Once the VMBD’s practices, staffing, and service delivery approaches have been documented in the best practices assessment, we would compare them to results of previous tasks and, to the extent they exist, identify major deviations between the Village’s practices and industry best practices. The summary report would be reviewed with the Village.

***Task Result: Detailed best management practices assessment of VMBD processes.***

### **Task 4      Evaluate VMBD Processes and Develop Recommended Business Processes and Staffing Impacts.**

Based upon the preceding work activities, we would evaluate the VMBD’s major work processes to identify opportunities to streamline and more proactively manage the

processes. We would evaluate these processes from a number of perspectives. The following table outlines the typical issues reviewed for inspections, plan review and permitting functions (similar approaches would be utilized for other service areas):

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The effectiveness with which the Village's information systems are utilized for plan check, and inspection services and opportunities to enhance the existing systems to share information.

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The reasons for any delays in the processing of plans or inspections based upon sampling of cases.

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The application process and submittal requirements including the ability to submit electronically.

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The extent to which services are proactively managed based upon performance targets.

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The extent to which the Department web site facilitates the permit application process.

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The extent to which inspectional staff utilize technology in the field to record inspection results.

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The manner in which inspectional staff are deployed.

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How plan reviews are scheduled, and how comments are transmitted to applicants.

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The frequency of resubmittals of plans for review.

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The efficiency of the process of reviewing and filing State Environmental Quality Report (SEQR) Forms.

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The degree to which fees have been developed for all services, and the sufficiency of cost recovery for each of these fees.

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How fees and escrow accounts are processed and managed.

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The extent to which policies and procedures are documented, and ensure standardization of inspectional services, customer service, plan check, permitting, communications with Boards, etc.

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The number of hand-offs between staff and the potential to cross-train staff to reduce the number of reviewers or expedite reviews.

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Approaches to simplifying the process (such as reducing the number of departments/divisions involved, modifications to requirements or regulations, or enhanced educational materials with customers).

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The clarity of submittal requirements for various applications and the completeness of information submitted by customers for applications and the degree that this impacts the ability of the Village to process these applications in a timely basis.

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We will evaluate existing performance metrics and recommend modification, elimination or additions to the measures to create a performance dashboard that can be utilized internally to manage workloads and performance and externally to communicate performance.

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Our consultants will also analyze the efficiency of the Zoning, Planning and Harbor and Coastal Management Commission in this task. This will include an analysis of the interactions with the VMBD, the manner in which meeting agendas are developed and posted, how minutes are prepared and posted, how the County and adjoining municipalities are apprised of meetings and events, and other important facets of Board operations.

The analysis of these issues needs to reflect the unique nature of the Village and its service desires and targets. Potential improvement opportunities will be discussed with staff and the project steering committee while in draft form to enable input and further refinement to best meet the Village's needs.

To the extent that revised processes, changes in performance metric or standards, or other recommendations have an impact on staff, we will document the impact, required staff changes, or modifications to staff roles. This impact will include cost estimates (or savings) from implementation. We will also provide recommendations, if appropriate, on modifications to the organizational structure if it would enhance service delivery.

***Task Result: At the completion of this task we will summarize our recommendations in a detailed issues list and preliminary recommendations regarding process improvements, staffing, technological and operational changes that should be implemented. This will be reviewed with the Village.***

#### **Task 5 Document Recommendations in a Final Report and Action Plan.**

Once the operational evaluations required to address all identified issues have been resolved, we will document our findings and recommendations in a final project report. This report will include:

A summary of our methodology, approach, findings and recommendations. This will include cost impacts of our recommended improvements, and a timeline for implementation.

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An evaluation of the Village of Mamaroneck's Building Department and Land Use Board, including work practices, management systems, organizational structure and staffing allocations, and technology.

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Improvement opportunities in processes in terms of streamlining, enhancing customer services.

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Documentation of existing business processes and recommendations for new business processes including "to be" process flows where applicable.

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Recommended service levels and performance metrics to measure departmental performance.

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An implementation plan covering all recommended process improvements consisting of:

- Specific implementation work steps.
- Suggested responsibility for implementation.
- Timing / phasing for accomplishing each work step.

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We will review the draft report with project steering committee, if one is established. Based on the results of that review, clarifications and additional analysis will be provided as appropriate and a final report developed. We will be prepared to make a presentation to Village staff and to the Board of Trustees.

***Task Result: Final report containing detailed process improvement plan for the development services function.***

## **5. PROJECT SCHEDULE**

The following table outlines our proposed project schedule to complete this engagement for the Village of Mamaroneck, based upon the proposed work scope. As shown, we are proposing to conduct the project within a twelve (12) week schedule.

Task	1	2	3	4	5	6	7	8	9	10	11	12
1. Profile												
2. Customer Input												
3. Best Practices Assessment												
4. Operations and Staffing												
5. Draft and Final Report												

We would be ready to begin work within two weeks of receipt of a notice to proceed.