



**PROPOSAL TO CONDUCT AN
OPERATIONAL REVIEW,
ORGANIZATIONAL ASSESSMENT,
DEVELOPMENT FEE AND COST
RECOVERY ANALYSIS**

APRIL 10, 2026

COMMUNITY DEVELOPMENT DEPARTMENT

LAKE COUNTY, CALIFORNIA

MATRIX
CONSULTING GROUP



Matthew Rothstein
Chief Deputy County Administrative Officer
Lake County
255 N. Forbes Street
Lakeport, CA 95453

Dear Mr. Rothstein:

Matrix Consulting Group, Ltd. is pleased to submit this proposal to conduct a Community Development Department Operational Review and Organizational Assessment for the County of Lake. We have prepared our response following a thorough review of RFP No. 261763, independent background research on the County and its Community Development Department, and a careful reading of the issued addendum.

Lake County's goals for this engagement are clear and well-defined: fees must recover costs but cannot be set at levels that deter investment or drive unpermitted construction; operations must be efficient, but staffing changes carry real public service consequences. These are the realities of local government our firm navigates every day. With more than 200 dedicated community development operational assessments and an extensive portfolio of California-compliant fee studies completed since our founding, Matrix Consulting Group brings the depth of comparable experience and the objectivity that Lake County needs to evaluate its options with confidence and implement recommendations that are practical and defensible.

We have structured our proposal around two distinct but coordinated scopes of work – a comprehensive organizational and operational assessment of the Community Development Department, and a development fee and cost recovery study – presented separately so that the County has clear visibility into the effort devoted to each. The two scopes are designed to run concurrently, with staffing findings from the organizational assessment informing the fee calculations before results are finalized.

As President of Matrix Consulting Group, I am authorized to represent the firm contractually and to execute any resulting service agreement. Aaron Baggary, Vice President and proposed Principal-in-Charge will provide executive oversight of the contract and project team and can be reached at abaggary@matrixcg.net.

We appreciate the opportunity to submit this proposal and look forward to the possibility of partnering with Lake County on this important initiative.

A handwritten signature in blue ink that reads "Alan D. Pennington". The signature is fluid and cursive, with a long horizontal stroke at the end.

ALAN D. PENNINGTON

President, Matrix Consulting Group, Ltd.

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COMPANY PROFILE

EXECUTIVE SUMMARY

Matrix Consulting Group proposes to conduct the County's engagement as two coordinated but separately scoped work efforts – Part A: Organizational and Operational Assessment, and Part B: Development Fee and Cost Recovery Study – running concurrently over an estimated six months from contract execution.

Part A addresses the organizational structure, operational efficiency, management systems, interdepartmental coordination, permitting workflows, technology utilization, and customer service practices of the CDD's Planning, Building, and Code Enforcement divisions. It also includes a high-level integration review of the Housing and Economic Development positions in the County Administrative Office. Part A is structured in nine tasks culminating in a final report with a phased implementation roadmap and, upon request, a Board of Supervisors presentation.

Part B is a comprehensive, California-compliant development-fee and cost-recovery study covering all three CDD divisions. Our methodology is a bottom-up approach – the most legally defensible available under Government Codes 66014 and 66016, and Propositions 218 and 26 – combining time estimates from staff workshops with fully burdened hourly rates to produce per-unit and annualized cost calculations for every fee in the schedule. Part B includes a comparative benchmarking survey, development impact and fee-adjustment scenarios, and practical Excel-based fee-adjustment tools that CDD staff can maintain on an ongoing basis.

The two scopes are designed to coordinate: staffing findings and fully burdened hourly rates developed in Part A directly inform the cost calculations in Part B before fee results are finalized. The County receives a single, integrated engagement with a single project team and a single point of contact – while maintaining clear cost visibility for each scope.

Our proposed project team is led by Aaron Baggaly, who will serve as Principal-in-Charge/Project Manager for the full engagement. Allyson Brekke will lead part A as the Lead Operational Analyst, with Amy Mabey, Joe McDonald, and Alexis Orrick as the remaining staff. Part B will be led by Khushboo Ingle, the Lead Financial Analyst, and supported by Madison Dixson and Anna Barnett.

HISTORY / DESCRIPTION OF SERVICES AND QUALIFICATIONS

Matrix Consulting Group, Ltd. is a management consulting firm dedicated to providing quality analytical, evaluation, support, and training assistance to local government. Our firm can be summarized as follows:

- Matrix Consulting Group was incorporated in California in 2003. We are headquartered in San Mateo, CA, with regional offices in 19 other states and one in Canada.

- We are comprised of 30 full-time and seven part-time highly experienced management consultants who specialize in analyzing local government functions encompassing the entire spectrum of critical operational areas.
- Since our founding, we have worked with over 2,000 government agencies, conducting management studies and cost-of-service evaluations and providing recommendations on operations, improvements, and cost recovery.

COMMUNITY DEVELOPMENT PROJECT EXPERIENCE

Our firm and project team have conducted over 200 dedicated development review studies. The following table provides an overview of assessments completed since 2020.

Boston, MA	Fort Worth, TX	Redondo Beach, CA
Bradenton, FL	Greeley, CO	Redmond, WA
Champaign, IL	Maui County, HI	Rocklin, CA
Clearwater, FL	Menlo Park, CA	Royal Oak, MI
Dallas, Texas	Miami Beach, FL	Riverside, CA
East Point, GA	Milpitas, CA	Rowan County, NC
El Segundo, CA	Mountain View, CA	Sammamish, WA
Escondido, CA	Napa County, CA	San Dimas, CA
Flower Mound, TX	New Orleans, LA	Stafford County, VA
Forest Grove, OR	Prosper, TX	Thousand Oaks, CA
Fort Collins, CO	Raleigh, NC	Ventura, CA

We are currently working with Sacramento County on a community development and user fee study. We are assisting Escondido (CA) with implementation assistance efforts. We are also finalizing community development studies in Skokie (IL) and Jonesboro (AR).

USER FEE STUDIES PROJECT EXPERIENCE

Our firm has extensive experience conducting comprehensive fee studies for various municipal organizations and departments. Recent California clients include:

Butte County, CA	Milpitas, CA	Redlands, CA
Cupertino, CA	Montebello, CA	San Bernardino County, CA
East Bay Regional Parks Dist., CA	Monterey County, CA	Santa Clara County, CA
Malibu, CA	Pacific Grove, CA	San Luis Obispo County, CA
Menifee, CA	Palo Alto, CA	San Mateo, CA

Details about any project mentioned above are available upon request.

WORK PLAN

This section describes our approach to fulfilling the County’s requested services, the detailed task plan for our proposed work, project schedule, an introduction to our proposed project team, and professional references.

APPROACH AND METHODOLOGY

The cornerstone of our philosophy in conducting organization and management studies is rooted in our project management philosophy and our principled approach to our work:

- 1 A principal of the firm is involved in every aspect of each study. For this engagement, Aaron Baggaly, Vice President, will serve in this role.
- 2 We approach our projects by gaining a firm grounding in formal and fact-based analytical methodologies.
- 3 Our projects have extensive input and interaction between the consultants and our clients’ staff, management, policy makers, and external stakeholders.
- 4 We provide our clients not only with the right answers but also with practical solutions for implementing change.
- 5 We engage regularly with our clients to ensure that the project remains on time, the schedule is maintained, and we are accessible when needed.

This approach has provided our clients with assistance and advice on meeting their communities’ needs.

PROJECT MANAGEMENT

We strongly believe in effectively managing each consulting engagement and utilizing formal project management techniques in our studies. These techniques include:

- Use of **project management software** to create timelines, track utilization, and communicate.
- Project team and client expectations and results are managed weekly through the development and use of **formal project schedules and reporting tools**.
- All project work activities are defined in advance and tied to each project team member, deliverables, schedule, and budget.
- The lead analysts develop **project-specific data collection plans and interview guides** for all our staff.

- At the start of the project, we will establish a series of **progress meetings** with the project steering committee and other key stakeholders, as needed, to review interim deliverables and findings as they are developed. This collaborative approach throughout the engagement ensures that there are no surprises and helps maximize buy-in at all levels.
- The **project executive designs and personally reviews all interim and final products** before they are delivered to the client.

These project management approaches have enabled us to deliver all our projects at high quality and on time. All our projects are completed within budget – we have never requested additional funding to complete the proposed scope of work. We are recognized for the depth and insight of our analysis and our responsiveness to clients.

PROJECT UNDERSTANDING

The County of Lake is seeking an objective, independent review of its Community Development Department (CDD) at an important moment for the County's economy and development trajectory. As a rural Northern California county of approximately 68,000 residents built around Clearlake, one of the oldest natural lakes in North America, and the center of a regional economy rooted in tourism, sport fishing, agriculture, and outdoor recreation. Lake County depends on an efficient, financially sustainable CDD to support responsible growth, encourage investment, and protect community character.

The CDD serves the community through three core divisions: Planning, Building, and Code Enforcement. The County also maintains dedicated Housing and Economic Development positions within the County Administrative Office (CAO), creating both coordination opportunities and organizational boundaries that this engagement will carefully evaluate. The Department uses OpenGov for permitting, providing a strong data foundation for process and cost analysis.

The request for proposal reveals two interrelated but distinct bodies of work at the heart of this engagement: an organizational and operational assessment of the CDD, and a comprehensive development fee and cost recovery study. While these two scopes will be conducted concurrently and their findings will inform one another, particularly given that staffing findings must be incorporated into fee calculations, we have structured our work plan to present each scope separately. This approach gives the County clear visibility into the time and resources devoted to each area of work and ensures that each scope receives the depth of attention it requires.

Three dynamics are central to our understanding of this engagement:

THE FEE STRUCTURE AND COST RECOVERY REPRESENT THE COUNTY'S MOST IMMEDIATE ANALYTICAL PRIORITY.

Lake County needs a defensible, comprehensive fee and fine study that ensures development-related fees cover the full cost of services – but County leadership has made clear that this is not simply a cost-maximization exercise. There are cases where increasing fees could frustrate investment and drive-up unpermitted construction. The ideal consulting partner will help the County navigate those trade-offs

with clear, scenario-based analysis. Our team will deliver a recommended updated fee schedule, along with practical fee adjustment tools that CDD staff can apply on an ongoing basis.

OPERATIONAL EFFICIENCY AND ORGANIZATIONAL EFFECTIVENESS ARE CRITICAL TO THE COUNTY'S ABILITY TO SERVE ITS COMMUNITY WELL.

The County seeks an honest evaluation of how the CDD is organized, staffed, managed, and coordinated – and where improvements can be made. Our work will include both an internal operational review and a structured customer and stakeholder assessment to ensure that the perspective of developers, contractors, and residents is captured alongside the internal view.

HOUSING AND ECONOMIC DEVELOPMENT POSITIONS CURRENTLY HOUSED IN THE CAO REPRESENT AN INTEGRATION OPPORTUNITY.

The County is seeking high-level recommendations on how to more effectively coordinate these functions with CDD's core work to support housing production and economic growth objectives without disrupting current organizational arrangements.

Matrix Consulting Group brings deep and directly relevant experience to this engagement: more than 200 dedicated community development operational and organizational assessments, and an extensive portfolio of development fee studies conducted in compliance with California Propositions 218 and 26 and Government Codes 66014 and 66016. Our approach is practical, grounded in the County's operational realities, and focused on producing recommendations that County staff can actually implement.

WORK PLAN

The following tasks describe our approach to the organizational and operational assessment of Lake County's Community Development Department (CDD). This scope focuses on organizational structure, staffing, workflows, technology, customer experience, benchmarking, and interdepartmental coordination. Findings from this scope will directly inform the fee study, particularly the staffing analysis component. We have split the Task Plan into two parts, which will run concurrently.

PART A: ORGANIZATIONAL AND OPERATIONAL ASSESSMENT

TASK A1: PROJECT INITIATION AND STAFF INTERVIEWS

Our engagement will begin with an on-site project kickoff meeting with County Administrative Office leadership, the CDD Director, and division managers. This meeting will confirm the study goals, refine the scope of work, establish communication protocols, and identify key internal staff members for subsequent interviews. We will also compile the initial data request at this meeting, including organizational records, workload data, budget documents, the existing fee schedule, and any prior studies or assessments.

Following the kickoff, the project team will conduct structured interviews with staff across all three CDD divisions – Planning, Building, and Code Enforcement – as well as with relevant staff in other departments involved in development review. These interviews will focus on four core areas:

- the adequacy of current service levels and where gaps exist;
- staff goals and perspectives on service delivery;
- workload demands by function and role;
- and the degree to which managers are utilizing technology to support scheduling, staffing allocation, and operational decision-making.

This task ensures the project begins with clear expectations, defined deliverables, and meaningful buy-in from staff and leadership at all levels.

TASK DELIVERABLES

- Project Initiation Memo
- Compiled Data Request
- Staff Interview Summaries.

TASK A2: DIAGRAM OPERATIONAL FUNCTIONS & PERMITTING PROCESS WORKFLOWS

This task will develop an in-depth understanding of the key workflows shaping service requirements across the CDD’s development review, building permitting, and code enforcement operations. We will conduct staff workshops to map the primary workflows of the Department’s core review and permitting processes. Each workflow map will display all applicable touchpoints between the applicant and County staff, how technology (including OpenGov) is integrated into the process, and where coordination with other departments occurs.

To ensure budget clarity, we propose mapping up to fifteen (15) major workflows, covering the most significant permitting pathways across all three divisions. The final list will be confirmed with CDD leadership during Task 1. These workflow maps, combined with the staff interviews from Task 1, will give the project team a clear picture of the Department’s current operational strengths and the specific points where procedures can be streamlined, redundancies eliminated, and service consistency improved. The final report will include proposed “to-be” process modifications for implementing best practices alongside the “as-is” maps.

TASK DELIVERABLES

- “As-Is” and “To-Be” Operational Workflow Maps
- Process Analysis Report

TASK A3: CURRENT STATE PROFILE OF OPERATIONS

Following staff interviews and workflow mapping, we will develop a comprehensive current state profile that captures our understanding of the CDD's structure, operations, and performance. This profile serves as the foundational reference point for all subsequent analysis and recommendations and will be shared with County leadership for confirmation before we proceed to evaluation and recommendations.

The current state profile will draw on interviews, workflow maps, and collected operational data to document: the Department's overall organizational structure and each division's responsibilities; staff job descriptions, roles, and capacity; adopted or required timelines for application and permit review processes; current development-related technology utilization; and preliminary workload data by service type and division. This profile ensures that our analysis is grounded in an accurate, shared understanding of how the Department currently operates.

TASK DELIVERABLE

- Current State Profile of CDD Operations

TASK A4: TECHNOLOGY AND SYSTEMS REVIEW

We will conduct a focused technology and systems analysis to assess the current technology environment used by the CDD. The project team will evaluate OpenGov – the Department's permitting and licensing platform – in depth, assessing its current configuration, the extent to which available features are utilized, and how well it supports efficient information sharing and the elimination of duplicative data entry. We will evaluate all aspects of the technology that support permit submittal, routing, plan review, fee determination and collection, permit issuance, inspection requests, and process completion.

Beyond OpenGov, we will assess data tracking and reporting capabilities across the Department, identify current staff accessibility and training issues related to technology use, and evaluate the potential for automation and enhanced reporting dashboards to support leadership decision-making. We will also assess how proposed technology improvements could enhance the Department's ability to respond efficiently to California Public Records Act requests. Recommended technology improvements will be practical and actionable and may include vendor recommendations upon request.

TASK DELIVERABLES

- Technology Assessment Memo with Improvement Recommendations

TASK A5: CUSTOMER SERVICE AND STAKEHOLDER ASSESSMENT

To ensure our assessment captures both the internal operational perspective and the experience of those who interact with the Department, we will conduct a targeted customer service and stakeholder assessment. This task is designed to strengthen customer-facing operations by giving developers, contractors, and home/business owners a structured opportunity to provide candid feedback on the CDD's current services, processes, and areas for improvement.

Our stakeholder engagement for this task will include an online survey distributed to prior customers of the Department, including developers, contractors, and community members, as well as up to two focus group sessions with representatives from the local development and building industry and other past customers. In recognition of the County's direction that external engagement be appropriately scoped, we have calibrated this effort to be efficient and targeted rather than broad-based, while ensuring that the study incorporates the external perspectives necessary for a complete and credible assessment.

In addition to direct stakeholder engagement, we will review the County's website and public-facing informational materials to assess how well the Department communicates expectations, requirements, and processes to applicants. We will identify specific strategies for strengthening the CDD's reputation as both customer-friendly and regulatory-compliant, balancing ease of access with the County's development standards and enforcement responsibilities.

TASK DELIVERABLE

- Stakeholder Survey Results Summary
- Focus Group Discussion Summary
- Customer Experience Assessment

TASK 6: BENCHMARKING AND BEST PRACTICES ASSESSMENT

Drawing on five comparable jurisdictions – identified in consultation with CDD leadership and the CAO – we will benchmark Lake County's community development operations against peer agencies and identify the best emerging service delivery trends. Comparable jurisdictions will be selected to reflect Lake County's rural character, scale, and development context, ensuring that benchmarks are meaningful and applicable.

Our benchmarking will focus on four key areas: process design and turnaround-time standards; technology adoption and system utilization; organizational structure models; and customer service strategies. We will also conduct a comprehensive best-practice assessment, evaluating the CDD's operations, including organizational composition, roles and responsibilities, staffing approaches, management practices, strategic planning, communication, training, and technology, against established best practices in the profession. The assessment will identify areas where the County currently meets or exceeds best practices, as well as specific gaps and opportunities for improvement that will form the basis for our recommendations.

TASK DELIVERABLE

- Benchmarking Report
- Comprehensive Best Practices Assessment

TASK A7: HOUSING AND ECONOMIC DEVELOPMENT INTEGRATION REVIEW

The County currently maintains one full-time position focused on Housing and one focused on Economic Development, both located in the County Administrative Office. We will evaluate how these positions currently coordinate with the CDD's land-use planning, building, and code-enforcement functions and identify practical opportunities for better alignment—through shared workflows, improved communication protocols, joint planning processes, or other coordination mechanisms. This task is scoped as a focused, high-level review.

Our recommendations will be immediately actionable without requiring significant organizational restructuring. The goal is simply to ensure that the County's housing production and economic growth objectives are being effectively supported by its land use and development review functions, and that these two positions are not working in isolation from the department most directly relevant to their mandates.

TASK DELIVERABLE

- Housing & Economic Development Integration Recommendations Memo

TASK 8: EVALUATION, ANALYSIS, AND RECOMMENDATIONS

This task integrates and evaluates findings from all previous tasks into a coherent, evidence-based set of recommendations. Rather than treating organizational structure, management systems, and interdepartmental coordination as entirely separate analytical exercises, we approach these three areas as interconnected dimensions of the same underlying question: how can Lake County's CDD be organized, managed, and coordinated to deliver effective public services efficiently and sustainably? The sub-tasks below address each area in depth, building toward an integrated recommendations report that the County can use as a roadmap for action.

SUBTASK 8A. MANAGEMENT SYSTEMS AND PERFORMANCE EFFECTIVENESS

We will evaluate the effectiveness of CDD's management systems and internal controls across all three divisions, assessing how workload is currently tracked and reported, what performance data is available to managers and department leadership, and how well existing reporting tools support operational decision-making. Interviews with division managers will surface both formal reporting practices and the informal management approaches that have developed over time.

Based on this analysis, we will recommend a set of performance indicators appropriate to the Department's scale and resources. We will identify standardized reporting templates and accountability tools ready for immediate implementation – giving leadership a consistent picture of departmental performance and equipping staff to track progress against defined service standards.

SUBTASK DELIVERABLE

- Performance Measurement Framework
- Standardized Reporting Templates and Accountability Tools

SUBTASK 8B. COMMUNICATION AND INTERDEPARTMENTAL COORDINATION

We will evaluate communication practices between CDD divisions and between staff and department leadership, as well as coordination with other County departments involved in development review, including Public Works, Environmental Health, and County Counsel. Our assessment will identify information-sharing gaps, duplicative processes, and coordination breakdowns that create delays or inconsistent outcomes for applicants.

We will recommend communication protocols and collaboration frameworks to address these gaps, prioritizing practical, sustainable solutions given the Department's current staffing resources and operational context.

TASK DELIVERABLE

- Communication Protocol and Interdepartmental Coordination Recommendations

SUBTASK 8C. ORGANIZATIONAL RESTRUCTURING OPTIONS

Drawing on findings from all preceding tasks, we will develop a set of organizational structure options for County consideration. We understand that Lake County leadership needs objective analysis of trade-offs, not a single prescribed answer, to support informed decision-making by the Board of Supervisors and County Administration.

We will evaluate alternative organizational structure models, ranging from incremental adjustments to the current division structure to more significant realignments of reporting relationships and functional responsibilities. For each option, we will identify the associated staffing and operational adjustments,

analyze costs and benefits, and provide a clear pros/cons assessment grounded in Lake County’s specific operational context, fiscal constraints, and service delivery goals.

SUBTASK DELIVERABLE

- Organizational Restructuring Options Report with Pros/Cons Analysis and Implementation Considerations for Each Model

TASK A9: ORGANIZATIONAL/OPERATIONAL ASSESSMENT FINAL REPORT AND PRESENTATION

Once the draft recommendations report has been reviewed by the project steering committee and County staff, we will incorporate feedback and develop the final report for delivery. The final report will contain: an executive summary with a phased implementation plan that prioritizes recommendations, identifies lead entities for implementation, and proposes timing and progress tracking milestones; the final comparative benchmarking and best practices assessment; a community and stakeholder feedback summary; and a diagnostic assessment with findings covering technology, organizational structure, staffing, management systems, and interdepartmental coordination. We will present our findings and recommendations to County leadership and/or the Board of Supervisors upon request.

TASK DELIVERABLE

- Final Organizational and Operational Assessment Report
- Phased Implementation Roadmap
- Board Presentation

PART B: DEVELOPMENT FEE AND COST RECOVERY STUDY

The following tasks outline our approach to the comprehensive development fee and cost-recovery study. This scope is structured as a separate but parallel work effort that runs concurrently with the organizational assessment. It will be coordinated so that staffing findings from Part A are incorporated into the fee cost calculations before results are finalized. All fee study work will be conducted in compliance with California Propositions 218 and 26 and Government Codes 66014 and 66016, which require that user fees “may not exceed the estimated reasonable cost of providing the service for which the fee is charged.”

TASK B1: DEVELOP SCHEDULE OF CURRENT AND POTENTIAL FEES

The project team will work with CDD staff to review the current fee schedule in line-item detail across all three divisions and all functional areas. These working sessions are critical to ensuring that any updates or structural changes to the fee schedule are captured before time estimates and cost calculations are developed. Our focus in these sessions will be on: renaming fees to more clearly identify services; eliminating outdated fees for services no longer provided; adding new fees to capture services currently

being provided without charge recovery; and recategorizing fees to better reflect actual service delivery patterns – for example, collapsing ranges that do not affect review times or adding approval-level distinctions where those differences genuinely drive cost.

It is important to conduct this structural review of the fee schedule before developing time estimates, so that any significant proposed changes are captured in the analysis from the start. However, subsequent adjustments can always be accommodated.

TASK DELIVERABLE

- Proposed Fee Structure(s) for Each Division and Functional Area

TASK B2: CONDUCT TIME STUDY WORKSHOPS

The project team will conduct time study workshops to gather time estimates for each service included in the fee study. These workshops involve structured interviews with key personnel from each division and program, walking through the basic process steps for each permit or service type, and documenting the time required for each step. Our team will try to minimize the burden on staff by incorporating any baseline assumptions from prior studies or existing time-tracking data from OpenGov wherever possible.

We will conduct multiple workshop sessions for each division and program, and the results will be compiled into Excel-based workbooks that staff can review, edit, and comment on. Staff will have dedicated time to review and provide feedback on the time estimate information before it is incorporated into the cost model. This step is essential for producing fee results that staff understand and can defend, and for building organizational buy-in for the recommendations that follow.

TASK DELIVERABLE

- Time Estimate Workbooks by Division and Service Type

TASK B3: DEVELOP FULLY BURDENED HOURLY RATES

Based on the County's staffing and budget information, the project team will calculate fully burdened hourly rates for all personnel classifications involved in providing fee-related services. Our rate calculations incorporate three cost components: direct costs – salary and benefits for each position, drawn from County staffing and salary reports; departmental indirect costs – administrative and management support, operational services and supplies, and costs derived from a departmental cost plan; and countywide indirect costs – support from County-wide service departments such as Finance, Human Resources, and County Counsel, based on the County's existing Cost Allocation Plan.

The project team will also review applicable MOUs and discuss productive hour calculations with departmental staff. These calculations ensure that fully burdened hourly rates appropriately account for

leave accruals – including holiday, vacation, and sick time – as well as time spent in meetings and training, so that the resulting rates reflect the true cost of productive staff time applied to fee-related services.

TASK DELIVERABLE

- Fully Burdened Hourly Rate Calculations by Position Classification

TASK B4: PERFORM TOTAL COST ANALYSIS

Matrix Consulting Group’s costing model is built specifically around each client’s operations, budget structure, and intended uses for the results. Our methodology is a “bottom-up” approach – the most defensible available for calculating user fees – that combines the time-estimate information from Task 2 with the fully burdened hourly rates from Task 3 to produce the full cost of providing each service on both a per-unit and an annual basis.

The County will receive detailed information on cost recovery surpluses and deficits at the granular level (per permit or application type), as well as a clear breakdown of cost components for each service. This granular visibility is what makes the resulting fee schedule defensible and helps County staff and decision-makers understand exactly what is driving costs in each service area. This will include incorporating any pass-through costs as needed.

TASK DELIVERABLE

- Per-Unit and Annual Fee Study Results
- Cost Recovery Analysis by Service Type

TASK B5: BENCHMARKING SURVEY

We will conduct a comparative fee survey based on the list of comparable jurisdictions confirmed with CDD leadership and the CAO. For each service area included in the study, we will develop fee scenarios that allow direct comparison with peer jurisdictions. The survey will include not only fee levels but contextual information: population size, budget, staffing, when each jurisdiction last conducted a fee study, and when they last updated their fee schedule, to ensure that comparisons are meaningful and appropriately qualified.

Survey results will be presented graphically for easy visual comparison and incorporated into the draft report. This comparative analysis does not drive our fee recommendations, which are grounded in the

actual cost of service. Still, it provides essential policy context for decision-makers weighing the competitiveness of Lake County's fee schedule against neighboring and comparable jurisdictions.

TASK DELIVERABLE

- Comparative Fee Benchmarking Survey
- Graphs and Contextual Summary Assessment

TASK B6: REVIEW & REVISE FEE STUDY RESULTS

Because the fee analysis is based on time estimates and other information provided by County staff, all participants must be comfortable with the methodology and confident in the data underlying the results. Once the project team has completed the cost model, we will provide CDD staff and County management with draft results workbooks showing time estimates, fully burdened hourly rates, and resulting per-unit cost calculations in a transparent, easy-to-interrogate format. Staff will have a formal review period to ask questions, flag any concerns, and suggest adjustments before results are finalized. This review step is foundational to producing a fee schedule that the County can confidently adopt and defend.

TASK DELIVERABLE

- Draft results workbooks for staff and management review

TASK B7: DRAFT AND FINAL FEE STUDY REPORT

Upon completion of all preceding fee study tasks, the project team will prepare a comprehensive fee study report summarizing the methodology, findings, and recommendations. The draft report will include: an executive summary covering the study approach, methodology, and key results; a section on proposed modifications to the current fee schedule, including any additions, eliminations, or recategorizations; per-unit results for each fee included in the analysis, as well as annualized revenue and cost recovery impacts where workload data is available; the comparative benchmarking survey with contextual analysis; the development impact scenarios from Task 9; and policy considerations and recommendations for the Board of Supervisors.

The draft report will be provided to CDD staff and County management for review and comment. All edits and revisions will be incorporated into the finalized fee study report, which will also include the fee adjustment tools and methodology guide developed in Task 9. The final report is designed to serve as a complete and self-contained reference document for the fee schedule adoption process.

TASK DELIVERABLE

- Draft Fee Study Report
- Final Fee Study Report with Fee Adjustment Tools

TASK B8: STAKEHOLDER PRESENTATIONS

The presentation of the fee study results to County officials and key external stakeholders is a critical step in moving from analysis to adoption. Because fee changes can be politically sensitive – and because Building Industry members and development professionals are among the most directly affected parties – we recommend that all presentations occur after the draft results have been reviewed and approved by departmental and County management, so that any factual questions have been resolved before public discussion begins.

We propose up to three presentations to stakeholders identified by the County, which is typically sufficient to enable adoption and implementation of the results. This may include Department staff/leadership, County Executive Office, and/or the Board of Supervisors.

TASK DELIVERABLE

- Fee Study Presentations to Stakeholders

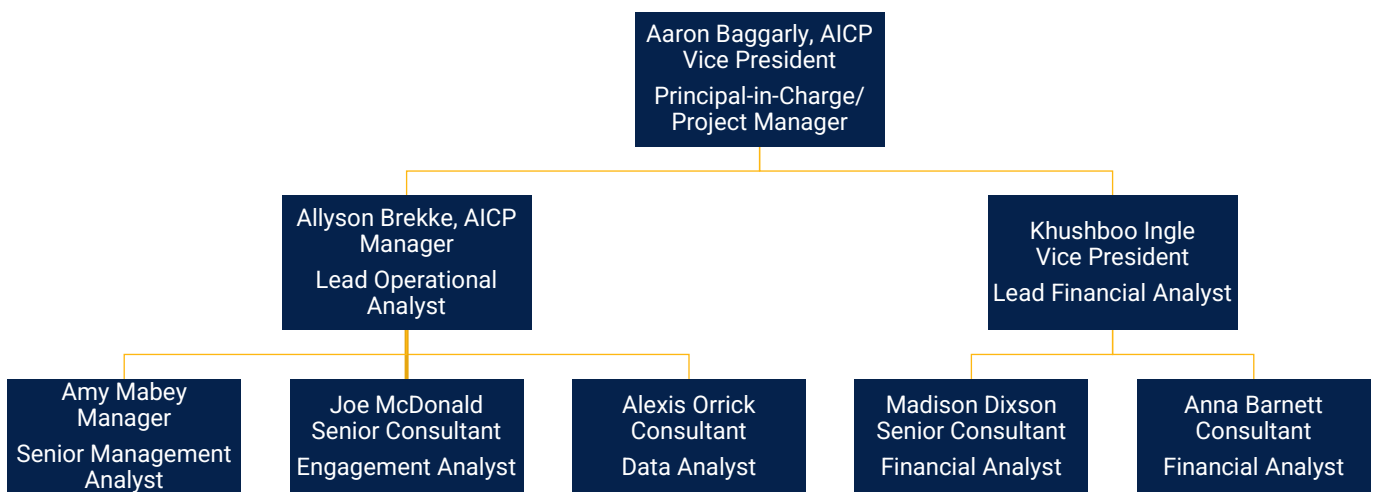
TIMELINE AND PROJECT SCHEDULE

Studies of this nature typically take 6 months. The staffing analysis should be finalized before the fee study to ensure the staffing results are incorporated into the fee analysis. The table on the following page shows our proposed project schedule.

Work Program	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6
PART A – ORGANIZATIONAL AND OPERATIONAL ASSESSMENT						
Task A1 – Initiation & Staff Interviews	■	■				
Task A2 – Diagram Workflows	■	■	■	■		
Task A3 – Technology & Systems Review	■	■	■	■		
Task A4 – Current State Profile		■	■			
Task A5 – Customer Service		■	■	■	■	
Task A6 – Comparisons		■	■	■	■	
Task A7 – H&ED Integration Review			■	■		
Task A8 – Evaluation and Analysis			■	■	■	■
Subtask 8a – Management Systems			■	■	■	■
Subtask 8b – Communication & Coord.			■	■	■	■
Subtask 8c – Organizational Options			■	■	■	■
Task A9 – Final Report & Presentation				■	■	■
■ <i>On-Site Visit 1 (Month 1): Project Kickoff · Staff Interviews · Workflow Workshops</i>						
PART B – DEVELOPMENT FEE AND COST RECOVERY STUDY						
Task B1 – Current & Potential Fees		■	■			
Task B2 – Time Study Workshops		■	■	■	■	
Task B3 – Fully Burdened Hourly Rates			■	■		
Task B4 – Perform Total Cost Analysis			■	■	■	■
Task B5 – Benchmarking Survey			■	■	■	■
Task B6 – Review & Revise Fee Results				■	■	■
Task B7 – Draft & Final Fee Study Report					■	■
Task B8 – Stakeholder Presentations						■
■ <i>On-Site Visit 2 (Month 5–6): Final Report Presentations</i>						

KEY PERSONNEL

We propose a qualified, experienced project team for this engagement. The team includes senior-level consultants with extensive experience in local government development and consulting.



Resumes for each team member begin on the following page.



AARON BAGGARLY, AICP
Vice President

Aaron Baggarly is the lead analyst on development review, permitting, and inspection related engagements. Prior to joining the firm, he was the Planning and Development Director in Stillwater, Oklahoma.

- Completed over 50 studies for municipal development operations, including: analysis of planning, building, and code enforcement, organizational review, and process evaluation and reengineering.
- Performed data and workload analysis, needs assessments, visioning, organizational and staffing assessments, public engagement, and best management practices evaluation.
- Serves as Chair of his local Board of Adjustment.

EXPERIENCE HIGHLIGHTS:

NAPA COUNTY, CA: DEVELOPMENT REVIEW ANALYSIS

As part of an assessment of the County's development process, the project team evaluated the staffing needs of the County Attorney's office related to supporting the County's development review, permitting, and inspection processes. This identified the need for three additional attorneys to support planning and modifications to the cost recovery models used by the County for legal support.

VENTURA, CA: DEVELOPMENT REVIEW PROCESS ANALYSIS

Aaron was the lead analyst for this study which analyzed the City's development processes. Key study findings included:

- Develop a comprehensive development guide and an online one-stop shop to provide guidance on the City's permit review process.
- Revise the approach to internal development review committees to increase collaboration between review entities.
- Technology assessment to improve customer service.

ROLE ON THIS ENGAGEMENT:

Aaron will serve as Principal-in-Charge / Project Manager.

RELEVANT CLIENTS:

CA Downey
CA Menlo Park
CA Milpitas
CA Redondo Beach
CA Redwood City
FL Bradenton
FL Clearwater
FL Miami Beach
FL St. Petersburg
FL ToHo Water Auth
MA Boston
NC Raleigh
NC Rowan County
OR Forest Groves
TX Dallas
TX Fort Worth
TX Flower Mound
TX Prosper
TN Knoxville
VA Blacksburg
VA Stafford County
WA Richland

YEARS OF EXPERIENCE:

18

EDUCATION:

BS, Appalachian State University, Community and Regional Planning, Minor in GIS.

PROFESSIONAL ASSOCIATION:

American Institute of Certified Planners (AICP)

American Planning Association



ALLYSON BREKKE, AICP
Manager

Allyson Brekke focuses on the Community Development Services practice area, with specialty knowledge in Cultural Resources and Historic Preservation, Economic Development, and Town and Gown Relations. Prior to joining the firm, Allyson served as Deputy Planning Director for Gallatin County, MT where she initiated a comprehensive housing study and the Director of Community and Economic Development for Port Angeles, WA where she helped City Council to adopt the City's two-year strategic plan. Her experience includes:

- Strategic planning, capital plan updates, budget/work plan development, development review efficiencies and analysis.
- Long-range planning efforts for environmental protection, comprehensive plans and housing needs.
- Organization and operation development and coordination of intergovernmental policies, programs, and operations.
- Community outreach facilitation and neighborhood planning.

EXPERIENCE HIGHLIGHTS:

NAPA, CA: ASSESSMENT OF THE PUBLIC WORKS DEPARTMENT DEVELOPMENT REVIEW PROCESS

Allyson served as the senior analyst on this assessment and focused her operational, process improvement, and staffing analysis on the Public Works Department to help identify different strategies in improving their development review process.

REDONDO BEACH, CA: EVALUATION OF THE COMMUNITY DEVELOPMENT DEPARTMENT

Allyson served as the senior analyst on this evaluation of the City's Community Development Department, which focused on creating more predictable entitlement and permitting processes, aligning staffing resources and workload, and transitioning to new development review software, online application submittal, and digital plan review.

ROLE ON THIS ENGAGEMENT:

Allyson will serve as the Lead Operational Analyst for the organizational and operational assessment component.

RELEVANT CLIENTS:

- CA, El Monte
- CA, Escondido
- CA, Hawthorne
- CA, Piedmont
- CA, Redondo Beach
- CA, Santa Rosa
- IL, Champaign
- MA, Boston
- MI, Royal Oak
- MO, Jefferson City
- NC, Raleigh
- NJ, Paterson
- SC, Columbia
- TX, Prosper
- TX, Tomball
- VT, Burlington

YEARS OF EXPERIENCE:

21

EDUCATION:

MCP, University of Pennsylvania, City Planning

BA, University of Mary Washington, Historic Preservation

PROFESSIONAL ASSOCIATION:

American Institute of Certified Planners (AICP)

Graduate of Northwest Women's Leadership Academy

Study Certificate in Town and Gown Relations



AMY SUE MABEY, MPA
Manager

Amy Mabey is an analyst with extensive experience in public administration, policy analysis, community development, public outreach, and emergency management. She combines leadership and strategic insight in her approach as a consultant. Her experience in large and small municipalities provides a multi-faceted understanding of city governance, resource allocation, and community engagement. As a consultant, she leverages this perspective with a focus on collaboration and evidence-based practices to deliver sustainable, impactful results.

EXPERIENCE HIGHLIGHTS:

OSHKOSH, WI: PERMITTING STUDY

Amy was an analyst who evaluated the City's permitting and inspection processes and their development codes. Key recommendations included:

- Establish process review times for all application types and communicate these internally and to the public.
- Implement a staff training program focused on customer service, staff performance, and succession planning.
- Modify the code compliant and inspection process and develop a prioritized complaint matrix to guide staff's approaches.

PLEASANT VIEW, UT: CITY ADMINISTRATOR

- **Municipal Operations and Leadership.** Administered all city operations, including budgeting, development, engineering, finance, justice court, planning, police, public works, and recreation, in alignment with the directives of the Mayor and City Council.
- **Staff Training and Development.** Designed and implemented a staff training program to enhance employee skills, encourage unity, ensure compliance with city policies, and promote professional development.

ROLE IN THIS ENGAGEMENT:

Amy will serve as the Senior Management Analyst for the organizational and operational assessment component.

RELEVANT CLIENTS:

CA, Escondido
CA, San Jose
IA, Cedar Rapids
TX, Denton
TX, Tomball
WA, Whatcom County
WI, Oshkosh

YEARS OF EXPERIENCE:

15

EDUCATION:

MPA, University of Utah
Emphasis in Local Government Management and Major Research Project for Civility in Government
BS, Utah State University
Political Science

PROFESSIONAL ASSOCIATIONS:

Utah City and County Management Association (UCMA)
Member and Legislative Policy Committee Voting Member
International City Management Association (ICMA)

CERTIFICATIONS:

Emergency Management Institute (EMI)
Advanced Public Information Officer
All Hazards Emergency Management Trainer



JOE MCDONALD, PSHRA-CP
Senior Consultant

Joe McDonald has served as an analyst on several engagements with a focus on administrative services, community development, and public works. Joe specializes in employee/community engagement efforts, data and staffing analyses, process optimization, and the development of technical documentation.

Joe also has facilitation experience, having participated in several process mapping workshops as well as holding a certification in DiSC facilitation.

EXPERIENCE HIGHLIGHTS:

BRADENTON, FL: COMMUNITY DEVELOPMENT ASSESSMENT

Joe served as an analyst on this evaluation of the City of Bradenton's Planning and Community Development department. Joe was responsible for facilitating stakeholder input, performing workload analysis, and drafting components of the draft and final reports.

CLEARWATER, FL: BUSINESS PROCESS STUDY

Joe served as an analyst on this study of the City's development review business processes. As part of this engagement, Joe administered and analyzed both community and employee surveys, moderated focus group meetings with stakeholders, developed process documentation, and conducted a staffing analysis to align the City's resources with its desired performance goals related to community development.

THOUSAND OAKS, CA: PROCESS OPTIMIZATION STUDY

Joe served as an analyst on this evaluation of the City's community development (e.g., planning, permitting) functions. The goal of the study was to document and optimize development review and permitting processes for successful implementation into the City's recently acquired development review software system.

ROLE ON THIS ENGAGEMENT:

Joe will serve as the Engagement Analyst for the organizational and operational assessment component.

RELEVANT CLIENTS:

- CA, Rocklin
- CA, San Dimas
- CA, EBRPD
- CA, SDCWA
- CA, Thousand Oaks
- CO, Greeley
- FL, Bradenton
- FL, Clearwater
- FL, Dunedin
- FL, Miami Beach
- FL, Palmetto Bay
- OH, Upper Arlington
- FL, St. Petersburg
- TX, Addison
- TN, Knoxville
- VT, Burlington
- WA, Issaquah
- WA, Snohomish Co.

YEARS OF EXPERIENCE:

4

EDUCATION:

- BA – Professional and Technical Communications – University of South Florida

CERTIFICATIONS:

- Certified Public Sector HR Practitioner (PSHRA-CP)
- Certified DiSC Facilitator
- Certified Five Behaviors Facilitator

PROFESSIONAL ASSOCIATIONS:

- Public Sector HR Association (PSHRA)
- International City/County Management Association (ICMA)



ALEXIS ORRICK
Consultant

Alexis Orrick recently joined our firm as a data analyst in our General Consulting Practice. Alexis works primarily on data analysis and metrics for operational, organizational, and staffing assessments.

Her relevant experience include:

- Reporting and Data Analysis
- Management and Communication
- Mixed Methods Research

EXPERIENCE HIGHLIGHTS:

ESCONDIDO, CA: DEVELOPMENT SERVICES ASSESSMENT

Alexis is the primary data analyst on the implementation phase of the assessment, assisting with customer service training, process mapping, documentation development (e.g., standard operating procedures, internal / external checklists, external resource materials, etc.), to equip leadership in change management to guide long term cultural changes in the organization

EAST BAY REGIONAL PARK DISTRICT, CA: RESOURCE ALLOCATION STUDY

Alexis served as an analyst on the review of resource allocation and staffing methodology. The study evaluated the operations, staffing, and organization of the Park Operations Department, which includes Park Maintenance, Maintenance & Skilled Trades, and Interpretive & Recreation Services.

RALEIGH, NC: STAFFING ASSESSMENT AND GROWTH MODEL DEVELOPMENT

Alexis is a data analyst on the project working primarily with the Raleigh Transportation Department to make staffing recommendations. She is one of the leads developing a growth model to project the City's staffing needs from 2025 to 2040.

ROLE ON THIS ENGAGEMENT:

Alexis will serve as the Data Analyst for the organizational and operational assessment component.

RELEVANT CLIENTS:

CA, EBRPD
CA, Escondido
CA, Milpitas
CA, Palo Alto
CA, San Mateo
CA, West Sacramento
MI, Rochester Hills
NC, Raleigh
OR, Wilsonville
WA, Bellevue
UT, Sandy

YEARS OF EXPERIENCE:

6

EDUCATION:

MSc Applied Social Data Science – London School of Economics and Political Science

BA Political Science: Comparative Politics – University of California, San Diego



KHUSHBOO INGLE
Vice President

Khushboo Ingle is a Vice President who manages cost allocation plan, user fee, development impact fee, and cost of service engagements. Her experience with the firm also includes participation in operational audit engagements focusing on reviewing organizational, staffing, and internal processes to enhance services. Khushboo's relevant experience include:

- Analysis focuses on verifying and reviewing cost of service assumptions and ensuring compliance with best practices.
- Expertise also includes impact fee studies and development fee-studies.

EXPERIENCE HIGHLIGHTS:

ALBANY, CA: FINANCE DEPARTMENT REVIEW

Khushboo was the lead analyst on this comprehensive evaluation of the internal operations of the department including assessments of organizational structure, staffing levels, internal financial processes, services provided to the organization and technology evaluation. Key recommendations included modifications to the staffing allocations, changes in position duties to utilize assigned resources, modifications more effectively to financial processes, and enhanced use of technology:

GREELEY, CO: FINANCE DEPARTMENT ASSESSMENT

Khushboo was the lead analyst on this comprehensive operational assessment of the City of Greeley Finance Department. This is a full-service Finance Operation including all core financial operations including accounting, accounts payables and receivables, budgeting, grants management, payroll, purchasing, and utility billing.

Key recommendations included realignment of the organizational structure to improve financial oversight and accountability, modifications to staffing to align resources with workload, and recommendations to policies and procedures to increase compliance with best practices.

PROJECT ROLE:

Khushboo will serve as the Lead Financial Analyst for the cost recovery and fee study component.

RELEVANT CA CLIENTS:

- CA, Burlingame
- CA, Long Beach
- CA, Manhattan Beach
- CA, San Mateo
- CA, S. San Francisco
- CO, Rio Grande Co.
- FL, Fort Lauderdale
- FL, Miami Beach
- HI, Maui County
- IL, Champaign
- NC, Asheville
- TX, Austin
- TX, Bellaire
- TX, Dallas
- TX, Garland

YEARS OF EXPERIENCE:
15

EDUCATION:

- B.A., University of California – San Diego, International Economics
- M.A., University of California – San Diego, International Affairs

PROFESSIONAL ASSOCIATION:

- California Society of Municipal Finance Officers
- Revenue Enhancement Best Practices



MADISON DIXSON
Senior Consultant

Madison Dixon is an analyst on cost allocation plan, user fee, development impact fee, and cost of service engagements. Madison's relevant experience include:

- Completed over 20 cost of service studies for clients across the United States.
- Analysis focuses on comparative review of services and fee levels.
- Expertise also includes narrative analysis of cost-of-service studies.

EXPERIENCE HIGHLIGHTS:

DUBLIN, CA: COST ALLOCATION PLAN AND FEE STUDY

Madison served as a project analyst on this engagement. She worked with the project team to input data into the model, conduct comparative surveys, and develop the draft report.

SAN RAMON, CA: COST ALLOCATION AND FEE STUDY

Madison worked as a project analyst, participating in interviews discussing support areas, reviewing time estimates, calculating revenue impacts, and conducting the comparative analysis.

PALO ALTO, CA: FEE STUDY

Madison worked as a project analyst, participating in developing the model, conducting the comparative survey, and providing support in developing the master fee schedule.

ROLE ON THIS ENGAGEMENT:

Madison will serve as a Financial Analyst for the cost recovery and fee study component.

RELEVANT CLIENTS:

- CA Burlingame
- CA Calimesa
- CA Daly City
- CA Los Altos
- CA Menifee
- CA Palo Alto
- CA Pasadena
- CA Redlands
- CA Riverside
- CA San Mateo
- FL Miami Beach
- FL Osceola County
- TX Addison
- TX Dallas
- WA Richland

YEARS OF EXPERIENCE:

4

EDUCATION:

B.A., Anthropology,
University of California,
Irvine



ANNA BARNETT
Consultant

Anna Barnett is an analyst in the Financial Services group. She works primarily on cost allocations plan, user fee, development impact fee, and cost-of-service engagements.

- Analysis focuses on data analysis of metrics.
- Expertise also includes narrative analysis of cost-of-service studies.

EXPERIENCE HIGHLIGHTS:

ORANGE, CA: COST ALLOCATION PLAN AND USER FEE STUDY

Anna supported the project team on this engagement. She worked with the project team to clean up data and enter the data into the excel model and develop workbooks for review for the Cost Allocation Plan.

JUNEAU, AK: COST ALLOCATION PLAN

Anna worked as a project analysis, participating in interviews discussing support areas, reviewing and compiling agenda statistic information, and developing a cost allocation narrative to describe the services being allocated.

ROLE ON THIS ENGAGEMENT:

Anna will serve as a Financial Analyst of the cost recovery and fee study component.

RELEVANT CLIENTS:

AK, Juneau
CA, Butte Co.
CA, Elk Grove
CA, Orange
CA, Palo Alto
CA, Poway
CA, Santa Clara Co.
CA, Sonoma
CA, Thousand Oaks
FL, Alachua Co.
FL, Miami Beach
FL, Osceola Co.
HI, Maui Co.
NC, Charlotte
TX, Dallas

YEARS OF EXPERIENCE:

1

EDUCATION:

B.A., Wofford College,
Mathematics

B.S., Wofford College,
Economics

REFERENCES

The following table provides contact information for clients who received similar services. All projects noted below included our proposed project team members.

BUTTE COUNTY, CALIFORNIA



Countywide User Fee Study

Meegan Jessee
Assistant Chief
Administrative Officer
(530) 552-3311
mjessee@buttecounty.net

Matrix Consulting Group conducted a countywide comprehensive fee study for Butte County. The County had last conducted an update in 2017. The goal of this analysis was to bring the county's fee structure in alignment with current practices.

The project team met with County staff to modernize fee structures, as well as reflect new departments / divisions and the services provided by them. Key components of the analysis included removing online permitting fees for Development services and consolidating them all as one fee (whether in-person or online).

ESCONDIDO, CALIFORNIA



Development Services Organizational Assessment

Megan Crooks
Management Analyst II
(760) 839-4021
Megan.Crooks@escondido.gov

Matrix Consulting Group completed a comprehensive assessment of the City's development review process and identified opportunities for increased efficiencies, integration of technology needs, improved internal and external collaboration, and resource needs to meet desired service level goals. This study resulted in over 80 unique recommendations to guide the City's development review, permitting, and inspection service operations for enhanced operational efficiencies.

Our team continues to be engaged with the City to assist with study implementation. These efforts will focus on improved communication and customer service training for staff, assist with documentation development (e.g., standard operating procedures, internal / external checklists, external resource materials, etc.), developing new job classifications and equipping staff in new roles, and to equip leadership in change management to guide long term cultural changes in the organization.

We are also completing a Police Department staffing study for the City.

**MONTEREY COUNTY,
CALIFORNIA**



**Countywide User Fee
Study**

Karen Riley-Olms
Management Analyst II
(831) 755-5132
[Riley-OlmsKA](mailto:Riley-OlmsKA@countyofmonterey.gov)
[@countyofmonterey.gov](mailto:Riley-OlmsKA@countyofmonterey.gov)

Matrix Consulting Group conducted a comprehensive fee study of the County's Housing and Community Development Department (HCD), including a time analysis and calculation of indirect cost allocations.

This study looked at fee-based services provided by Housing, Planning, Building, Engineering, and Environmental Services and documented the associated direct and indirect costs. Services that were currently being provided, but for which fees were not assessed, were also evaluated.

The culmination of this analysis provided HCD and the County with documentation outlining the full cost of providing fee-based services. This information, in conjunction with a jurisdictional survey, helped the County determine where to set fees.

**OSHKOSH,
WISCONSIN**



**Development Review
Process and Code
Analysis**

Sara Rutkowski
Community Development
Director
(920) 236-5045
[SRutkowski@oshkoshwi.](mailto:SRutkowski@oshkoshwi.gov)
[gov](mailto:SRutkowski@oshkoshwi.gov)

Matrix Consulting Group undertook an assessment of the Community Development Department, the development review, permitting, and inspection processes, and code review. This study evaluated all aspects of Community Development operations (Planning, Inspection Services, Economic Development, and Assessor) and identified organizational and process improvements. Key recommendations included:

- Modify the permitting software system to improve workflows, functionalities, and performance reporting.
- Transition to an all-digital submittal and review process.
- Modify the pre-application process to be more streamlined for both the applicant and staff.
- Incorporate customer service expectations and monitoring in employee evaluations.
- Updates to the municipal code to align with best practices and remove language that is ambiguous.
- Aligned staffing levels to meet workload and service level goals.

Our financial services team is finalizing an evaluation of the City's development fee schedule.

**PIEDMONT,
CALIFORNIA**



**Planning & Building
Organizational
Assessment & Fee
Analysis**

Kevin Jackson, AICP
Community
Development Director
(510) 420-3039
kjackson@piedmont.ca.gov
[v](#)

Matrix Consulting Group was tasked with conducting a comprehensive assessment of the Planning and Building Department's operations, processes, and staffing needs. This organizational assessment served as a precursor to updating the City's development fee schedule.

The organizational assessment of the Department included a comprehensive review of current business processes, technology utilization, customer engagement/outreach and staffing needs. Numerous recommendations were made to formalize current business practices, implement succession planning, and enhanced training opportunities for staff.

Technology recommendations focused on expanding the recently implemented permitting software system and where to leverage it to be more efficient. A staffing analysis was completed to align workload and service level expectations with staffing needs. This included the transitioning several part time positions to full time classifications to maintain the concierge level of service desired by the City. The staffing analysis was also completed through the lens of cost recovery goals where applicable.

Additional references and/or details about any project listed above upon request.

COST PROPOSAL

Matrix Consulting Group proposes to perform a Community Development Fee Study and Staffing Analysis for a fixed price of **\$133,640**. The following table shows our proposed project cost by task, including hours and per-task costs. Following the project cost is a list of hourly rates per proposed team member.

PART A — ORGANIZATIONAL AND OPERATIONAL ASSESSMENT		
Task	Total Hours	Total Fee
Task A1 – Project Initiation and Staff Interviews	46	\$8,510
Task A2 – Diagram Operational Functions and Permitting Process Workflows	56	\$10,210
Task A3 – Technology and Systems Review	32	\$5,730
Task A4 – Current State Profile of Operations	32	\$5,940
Task A5 – Customer Service and Stakeholder Assessment	36	\$6,270
Task A6 – Benchmarking and Best Practices Assessment	50	\$8,660
Task A7 – Housing and Economic Development Integration Review	24	\$4,420
Task A8 – Evaluation, Analysis and Recommendations	60	\$10,890
Subtask 8a – Management Systems and Performance Effectiveness	17	\$3,110
Subtask 8b – Communication and Interdepartmental Coordination	21	\$3,790
Subtask 8c – Organizational Restructuring Options	22	\$3,990
Task A9 – Final Report and Presentation (Part A)	50	\$9,510
Part A Total Hours	386	\$70,140

PART B — DEVELOPMENT FEE AND COST RECOVERY STUDY		
Task	Total Hours	Total Fee
Task B1 – Develop Schedule of Current and Potential Fees	14	\$2,340
Task B2 – Conduct Time Study Workshops	28	\$4,680
Task B3 – Develop Fully Burdened Hourly Rates	32	\$5,260
Task B4 – Perform Total Cost Analysis	138	\$21,600
Task B5 – Benchmarking Survey	26	\$4,080
Task B6 – Review and Revise Fee Study Results	32	\$5,470
Task B7 – Draft and Final Fee Study Report	62	\$11,070
Task B8 – Stakeholder Presentations	16	\$4,000
Part B Total Hours	348	\$58,500
Total Hours – All Tasks	734	
Total Professional Fees		\$128,640
Travel Expenses (On-Site Visit)		\$5,000
TOTAL PROJECT COST		\$133,640

HOURLY RATES		
Team Member	Role on Team	Hourly Rate
Aaron Baggarly, AICP - Vice President	Principal in Charge/Project Manager	\$250
Khushboo Ingle - Vice President	Lead Financial Analyst	\$250
Allyson Brekke, AICP - Manager	Lead Operational Analyst	\$190
Amy Mabey, Manager	Senior Analyst	\$190
Joe McDonald, PSHRA-CP - Senior Consultant	Engagement Analyst	\$170
Madison Dixson, Senior Consultant	Financial Analyst	\$170
Anna Barnett, Consultant	Financial Analyst	\$145
Alexis Orrick, Consultant	Data Analyst	\$145