

2007-2008 TOWN MANAGEMENT REPORT NEW COMMUNITY STRATEGIES



6/1/2008

Introduction to Management Report

New Community Strategies has been managing the Town of Loxahatchee Groves in the capacity of Town Manager and Town Clerk since June 12, 2007. This report summarizes management activity from June 2007 to June 2008.

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GENERAL MANAGEMENT DUTIES

1. General communications with the public concerning services and constituent issues.

This is the area the NCS has experienced the greatest success. The legislative, business and management skills are critical to the success of this Town, however, the customer service that is provided to the citizens of Loxahatchee Groves has the greatest impact. The constituents thrive for information and want to be put down a clear path to resolve their issues and concerns. Our office has continually gone above and beyond to provide this customer service to everyone that has interacted with our staff. Everyone in this town has a lot of pride and ownership and it is vital that the management team recognizes this. We are the link to keeping everyone engaged and feeling apart of the Town.

2. Code Enforcement

This has been one of the most challenging areas to manage for the Town. Code Enforcement services began in August of 2007. Town Management established and professionalized a case reporting system and an organized process to follow throughout the Code Enforcement case investigation. We have managed the Code Enforcement officers and have guided them with research and any other technical assistance they may have needed. We have interacted with many county agencies to get resolution and clarification on several zoning and ULDC concerns. Educating the public in reference to compliance options has been one of our primary goals with the Code Enforcement officers. As Code Enforcement remains as “complaint” driven, Town management will continue to professionalize the investigation process and educate any citizens along the way to resolve matters amicably and expeditiously.

3. Notification and communication with utilities, government entities and other parties related to the incorporation of the Town.

Throughout the 1st year of municipality's incorporations, it is critical to notify all government agencies and other entities of the Town's incorporation. The Town must establish communication and relationship with any entity that does business with the Town. Working with the Town Attorney's law firm, Town management has completed all necessary notifications and has created the necessary business relationships with these entities.

- **State of Florida Department of Revenue** (*TRIM Compliance, Sales Tax and State Revenue Sharing, CST Collection and general financial compliance procedures*)
- **State of Florida Department of Agriculture** (*Right to Farm issues and Best Management Practice Updates*)
- **State of Florida and Palm Beach County Department of Environmental Protection** (*Water protection concerns and assistance with manure dumping cases*)
- **State of Florida Department of Community Affairs** (*Land Use Plan Amendment approval, Compliance with Comprehensive Planning, and other matters that the Town has been involved with the D.C.A. (such as E-Road/1 40th removal from the PBC T.I.M.)*)
- **South Florida Water Management District:** (*Interaction with Fred Rapach and other Board of Directors throughout the variance approval process for the LGWCD*)
- **Palms West Chamber of Commerce and PBC and Florida League of Cities:** (*Established a clear line of communication to keep Town information updated and to be kept abreast of any legislative or community issues that need to be addressed by the Town Council*)
- **Palm Beach County Property Appraiser and Tax Collector Offices:** (*Worked with Property Tax Roll Coordinator to establish an accurate list of residents in the Town to insure maximum ad-valorem collection and established a clean and concise data base to assess for the waste hauling for the coming years*)

4. Identify and additional agreements with other entities that the Town should consider

Town management is currently working with PBC Environmental Resource Management and PBC Water Utilities to enter into agreements to provide services for the Town of Loxahatchee Groves

5. Ongoing communications with Palm Beach County and its county government agencies providing services in Loxahatchee Groves

Town management has worked with Palm Beach County Planning and Zoning under the guidelines set forth by the Inter-local Agreement with the Town. We have established a system of reporting and processing for all applications for the Town. In addition, we have set up a direct line of communication to solve any issues and provide information relating to zoning and planning matters with the Town.

FINANCE AND RISK MANAGEMENT

1. Creating a professional and efficient financial system

Town management outlined its goals at the beginning of the contractual period as follows:

- a. Draft financial policies and draft procurement policy/manual:** Town management is working with Town Attorney to present these by the end of September 2008.
- b. Review accounting software:** Town management has setup uniform government accounting using Fundware to be utilized for the 2008-2009 fiscal year.
- c. Establish accounting procedures and controls, manage receivables and cash receipting and manage general ledger bank reconciliation:** Town management's financial department has established financial controls and is managing all banking activities on a monthly basis.
- d. Manage cash management and investment policy:** Town management has recommended and implemented sound investment policies for the 2007-2008 fiscal year. With the banking climate at an all time low, it was critical to secure the Town's funds while yielding the maximum return.
- e. Support auditor selection and auditor selection committee:** Town management established an RFP outlining criteria to selecting an audit firm. Once the audit firm was selected, we have been helping complete the audit for the 2006-2007 audit year. Once the management letter is produced, Town management will insure that any and all concerns are addressed.

f. Develop asset management policies and procedures and maintain asset management system for the town: The Town currently doesn't have any assets. In the future should the Town desire to retain assets, Town management will create policies and procedures of obtaining and maintaining those assets.

CLERICAL

1. Performance of traditional Town Clerk functions: Town management has established and is maintaining a professional Town Clerk system by performing the following tasks:

- Prepare minutes of Town Council meetings and workshops.
- Prepare and distribute agendas for the above-referenced meetings.
- Provide for public notice of all meetings subject to the Sunshine Law and provide for legal advertising – publication and posting of notices - as necessary.
- Maintain custody of municipal records, including ordinances, resolutions, contracts and agreements; and promulgates procedures for the orderly management, maintenance, retention, and destruction of said records in accordance with state law. Serves as the state Records Management Liaison Officer.
- Administer the publication, maintenance and distribution of the City Code of Ordinances and supplements thereto.
- Provide for response to public records and informational requests received.
- Serves as the liaison and final certification for all Business Tax Licenses in Palm Beach County within the Town of Loxahatchee Groves.

TOWN MANAGEMENT

1. **PBC Water Utility Connections:** Town Management has implemented a system with Palm Beach County Water Utilities to allow for specific Town residents to apply for possible connection for water service from Palm Beach County.
2. **Town Development Applications:** Town Management, along with Kevin McGinley, has successfully prepared many applications that have come before the Town Council for consideration. We coordinated with applicants, planners and county staff to present staff report to the Town Council.
3. **Solid Waste Contracts:** Successfully bid and negotiated a contract to provide for Solid Waste Hauling services from 2008 to 2012 with Waste Pro Inc.
4. **Communications:**
 - a. **Newsletters:** Town Management produced and distributed newsletters to the residents of Loxahatchee Groves
 - b. **Website:** Town Management created and is maintaining a very resourceful and user friendly website for all residents and any individuals needing information relating to the Town. All official Town documents, general information, pictures, business opportunities and planning information are just some of the features of the Town's website.
5. **Planning:**
 - a. **Land Use Plan Amendment:** Assisted with Calvin-Giordano in successfully transmitted and adopting the Land Use Plan Amendment for the Town to be changed to 1 unit dwelling per 5 acres
 - b. **Strategic Visioning and Planning:** Spearheaded, organized and successfully implemented the Strategic Visioning process with Dr. Herb Marlowe, Analytica. We handled all logistics for the meeting, produced all necessary documentation in a timely fashion, and prioritized the community participation and established a consistent and regular communication throughout the process.
 - c. **Comprehensive Planning:** Town Management has set up the schedule and work plan for the team of Calvin-Giordano to plan and draft the Town's Comprehensive Plan to be submitted to D.C.A. by the end of 2008. We will be spearheading the same logistics as previously accomplished with the Strategic Visioning and Planning

Town Management Task List:

- Create and implement policy and procedure manual for Town Office. This will provide for ease of access to necessary information for all staff and Council members. (*July 2008*)
- Implement Government Uniform Method of Accounting and Reporting for the 2008-2009 fiscal year (*September 2008*)
- Establish a 5-year business plan for the Town to consider (*December 2008*)
- Map out long-term plan and structure for the Town to establish the following (*Later part of 2009*)
 - Uniform Land Development Codes
 - Town Code of Ordinances
 - Planning and Zoning: Palm Beach County, through an inter-local agreement with the Town, handles all planning and zoning matters on behalf of the Town. Once the Town adopts its own ULDC, the Town will then need to have in place a process to handle all planning and zoning matters within the Town itself. This can be accomplished by hiring additional town staff or outsourcing to a specialized firm that handles all planning and zoning matters.
- Retain the on-call services of a grant-writing firm: Town Management will research and present opportunities for the Town to receive financial assistance with matters that the Town Council deems necessary and appropriate.