TO: Honorable Mayor Jean Rosenfield and Members of the Village Council
FROM: Jorge M. Gonzalez, Village Manager
DATE: November 3, 2014
SUBJECT: Village Manager Annual Report 2013-2014

November 12, 2014 will mark the completion of my first year as your Village Manager. I am thankful for the trust and confidence each of you have placed in me, and I appreciate the opportunity you have given me to serve this community. As we reach this first anniversary, I want to take this opportunity to share with you some of the key areas of focus, as well as highlight some of our achievements over the past year. In reviewing the events and accomplishments of the past 12 months, we can take pride in the many successes Bal Harbour Village has experienced, and we can look forward to much more continued progress in the years to come.

The past year has been one of transition – not only for me, but for the Village as well. We have seen significant changes at Village Hall over the course of the past year. We have changed the way we do business, the way we are organized, who is providing services, and most importantly, we have changed our focus and priorities. I have worked to ensure that above all, we provide efficient and effective services to our citizens and customers in a professional manner, with a primary focus on good customer service. The personnel decisions I have made reflect my personal commitment to elevating our competency and quality of work, ensuring a renewed mindset toward efficiency and professionalism. Overall, we have seen a great deal of progress in many areas, and I am satisfied that my first year as your Village Manager which has been challenging, rewarding, fun and positive. I can safely say that the organization and the Village are better positioned today to deal with the challenges and opportunities that lie ahead.

Pursuant to Section 5.3 of our Employment Agreement, "The Village Council shall evaluate the performance of the Employee in October of each year ..." As I approach the completion of my first year as your Village Manager, I have prepared a summary report of the activities I and staff have undertaken in the past year, as well as the resulting accomplishments. I have also attached a form developed by the International City/County Management Association (ICMA) (modified for use by Bal Harbour Village), which you may want to use as you consider the achievements of the past year. As a reminder, this information is subject to the Sunshine Law and should be used with that consideration in mind.
BACKGROUND

During the Village Manager selection process, I was asked to comment on the challenges I saw facing Bal Harbour Village, as well as what would be my areas of focus as I began my tenure as your Village Manager. The following summarizes my thoughts and responses, which have served as the basis for our priorities for the past year:

Challenges:

• **Restoring trust and confidence in the Village.** Instilling professionalism and competence to the organization and uniting the community, the Council and the organization;

• Designing and developing a financing mechanism to **address the Village’s dated infrastructure** both above and below ground. Begin to address environmental issues, such as beach erosion and rising sea levels; and, **enhancing and beautifying public spaces;** and,

• Negotiate and **finalise a settlement with the Department of Justice** (and/or any other federal agency) to bring closure to the issues regarding the special task force, forfeiture funds, police department investigations that have brought unwanted attention to the Village. Establish appropriate fiscal policies and procedures to ensure that the Village’s finances are never again in question.

Areas of Focus:

• Meet with the various interested stakeholders of the community. I would solicit their perspectives – what they think are the strengths and weaknesses, where the opportunities lie, and how they can contribute to the greater outcome.

• Work to develop a strategic plan and framework for Council and the community. Make sure that we define our community’s expectations. I would want to make sure that we are doing the things the community wants us to do, and that we are spending our resources wisely on those things.

• Assess staff competency and recruit appropriate individuals to round out the team. I would fill vacancies that exist, and build an overall capacity in the organization to meet the challenges ahead.

• Fully analyze the Village finances to understand where the resources are generated and how they are being spent. Ensure that the Village is on sound and sustainable financial footing for the near and long term. Ensure we have adequate reserves, and most importantly, that the resources are tied to intended outcomes.

In addition to the above, a long list of “Items for the New Manager,” had grown during the almost 12 months that the Village Manager position remained vacant. Lastly, like
any local government, there was no shortage of routine day-to-day needs and/or issues that arise requiring attention.

SUMMARY OF ACCOMPLISHMENTS

The following summarizes the key accomplishments of the past year. For ease of review, it is organized in a manner similar to the identified Challenges and Areas of Focus mentioned above. In addition, I have attached a more comprehensive list of accomplishments in these areas, as well as within our various Departments for this review period.

Restoring Trust and Confidence

I believe that the best way to regain trust and confidence in any organization is to ensure openness and transparency in all of our activities. Everything we do should be done in an inclusive, open and well-informed manner. Over the past year, I have implemented several initiatives to ensure greater public inclusion and transparency. In addition, best practices have been established where needed to ensure compliance with our Village Charter and/or Code of Ordinances and accepted industry standards.

An essential first step was to completely reengineer our agenda development process and staff preparation for Council meetings. This entailed the following:

- The Agenda is now available (electronically and hard copy) to all who may wish to review it at least one week in advance of the regularly scheduled meeting.
- An organized numbering convention for items has been implemented to facilitate the meeting flow. This structure also allows for ease of research in the future.
- All items included in the agenda are well-considered in advance. The reports are thoroughly researched, properly developed and fully presented, and include an Administration Recommendation. Staff is well-versed and present to answer any questions that may arise.
- Each item is accompanied by a legally sufficient resolution ready to be signed and recorded.
- Agenda Review meetings are made available to each of you making myself available to answer your questions in advance of the meeting;
- The Council Meetings are now live streamed on the Village website and all material is available electronically for ease of reference.
- After Action staff meetings are held immediately after Council meetings to ensure that proper assignments for follow up and completion are made.

The Council Committee structure was also reviewed and recommended changes were made, approved and codified. These changes served to:
• Develop and codify a set of standards and membership requirements for the committees;
• Create the Budget Committee, a newly formed standing committee to advise the Council and me on fiscal matters;
• Establish official terms, term limits, method of appointment and expectations;
• Sunset the Residential Advisory Committee (RAC); and,
• Begin the long discussed process of transitioning to a self-reliant community association for the gated community.

Several public processes to develop consensus on important community issues were conducted and best practices for procurement of public services were implemented:

• Branding Initiative – multiple public workshops to reach consensus on final Brand Essence and guidebook; community consensus on the “Brand House” and next steps. This initiative has also served to establish a broad collective vision for the Village activities and aspirations;
• Budget Committee/Budget Development – multiple public committee meetings to thoroughly review the FY 2014/15 Millage, Operating Budget and Proposed Enhancements; developed Issue Sheets for significant Village departments and/or decision points; developed community consensus on the proposed millage and budget. Established fiscal policies to ensure sound financial footing. Reviewed and revamped Village fee schedule and ensured consistency between the Village Code and actual fees charged;
• Advertising Agency – formal Request for Proposals (RFP) advertised, diverse evaluation committee created to review responses and administrative due diligence in advance of Council approval;
• First Annual Legislative Agenda – individual meetings with our State lobbyist, development of individual priorities, Council approval on consensus priorities, grant development, submission and award for Sewer Utility projects ($600,000);
• Voter referendum – developed language and Council approved a voter referendum question to amend the Charter provisions regarding purchasing authority. Voters passed the referendum with over 54% approval;
• Annual External Audit – completed and submitted to Council with no audit findings;
• Purchasing and Contracting – administrative direction to secure at least three bids for the purchase of goods and services (resulting in reduced costs for services), review of all existing contracts to ensure compliance with Village Code, continue to update contracts where needed; and,
• Pilot program outsourcing recreation programming to Peer Programs for Village events, such as Halloween, Labor Day/Food Trucks, etc.

Address the Village’s Aging Infrastructure / Enhance and Beautify Public Spaces

Addressing aging infrastructure is an important role of local government, particularly in light of global climate change. As a result, my Administration has focused on assessing
the current state of Village infrastructure, as well as identifying funding sources in order to pursue upgrades.

Over the last 12 months, we have undertaken the development and approval of a Utilities Master Plan, which included a public workshop to gain input from residents and businesses as we pursue future upgrades. This Master Plan includes efforts to mitigate the effects of climate change and rising tides, and will set in motion our long-awaited upgrade to the Village’s utility infrastructure. The final Master Plan will be submitted to the Council for approval in the coming months. In order to address our infrastructure needs, I, along with my staff, have pursued potential funding sources, including initiating discussions with Miami-Dade County for the assignment of $6.5 million in General Obligations Bonds for upgrades to sewer infrastructure improvement projects in Bal Harbour Village. Moreover, my Administration has secured a $600,000 grant from the State of Florida to fund engineering and construction services towards the completion of the overall Utilities Master Plan. Finally, we have analyzed the Utility Fund to ensure that infrastructure costs are fully paid by users and not taxpayers through property taxes.

Several initiatives have been initiated in order to improve the appearance and upkeep of our public spaces. By merging the Public Works Department and the Parks & Recreation Department into one cohesive operation, aptly named Parks and Public Spaces, whose focus has shifted from addressing issues in a reactionary manner to a better planned and scheduled series of activities that will ensure that public areas and infrastructure are well-maintained. Over the last year, my Administration has successfully completed the following projects:

- Completed the Village’s Comprehensive Beach Renourishment Program
- Completed preliminary design and submitted for permitting the Beach Sand Transfer Project
- Completed the Beach Path Restoration Project
- Purchased and installed new light bollards on the beach path
- Removed Code Blue telephones from the Beach Path
- Finalized Bus Shelter Project, including ensuring that no leaks were present, as well as establishing a daily cleaning schedule
- Engaged in various facility and building upgrade/repairs in the Village Hall Complex (i.e., LED lighting in Council Chamber, roof repairs and stabilization at Village Hall and Public Works Building, etc.)
- Established the first Recycling Program in Village Hall and Village buildings.
- Established a program to pressure wash curbs and gutters
- Painted the Herman B. Fultz Bridge (Haulover Bridge)

In order for the Village to better address appearance from a regulatory perspective, Village staff and the Village Attorney’s Office developed an ordinance, which was adopted by the Council, to expand the Appearance Code to the Business District and an ordinance to regulate the appearance of roofs throughout the Village, including the B District (Business District).
Opportunities have also presented themselves to improve the Village's position in development agreements, which impact the maintenance of public areas. The One Bal Harbour settlement agreement was executed in October 2014, when Lionstone Development (Ritz Carlton Hotels) assumed ownership of the One Bal Harbour Resort and Spa. In preparation for the closing, the Village identified all outstanding issues at the One Bal Harbour property. The Village and the One Bal Harbour Corporation (OBHC) signed an agreement to memorialize all outstanding issues. In addition, the One Bal Harbour Corporation provided the Village with $102,041 to hold in escrow for the renovation of the loading dock area, as well as the landscape improvements to the parking lot area, roadway and beach, as described in the original development agreement with the Village.

The funds for the landscape escrow are to be expended by the Village to ensure the improvements outlined in the original development agreement are completed. The funds held in escrow related to the loading dock improvements will be returned to the OBHC once their work has been completed. Lionstone Development has also been made aware of the agreement and plan of action with the Village.

As a result of this agreement, I feel the Village is much better positioned to ensure the maintenance and upkeep of these highly visible public areas.

Finalize a Settlement with the Department of Justice

Needless to say, the issues surrounding the Department of Justice's (DOJ) investigations into the Tri-County Task Force activities led by the BHV Police Department resulted in a very difficult and trying period for Bal Harbour. The scrutiny and attention brought with it a great deal of unease and stress to the community, the Council, the organization and the Police Department. Bringing closure to this unfortunate chapter in our Village's history was a priority for me from day one. While working closely with our attorneys, we were able to minimize the Village's financial exposure. Late last year, we reached a settlement with the Federal agencies resulting in no direct fines at taxpayer expense. The Village was required to return Federal seized asset forfeitures, forego pending awards and was barred from participating in the program going forward.

Immediately, I turned to undoing the damage that had been done. The first and most important step was to appoint a new Chief of Police and direct him to change the culture of the Police department to focus on doing the right things and doing them the right way. Chief Mark Overton joined our team in January of 2014. I tasked him with focusing the department on community policing and all police activities are now conducted with a priority on serving our local community needs. Together, we have worked diligently with the Federal Bureau of Investigations (FBI) Miami Division to conclude the criminal investigation related to the actions of the Bal Harbour Police Department's involvement in the Tri-County Taskforce. Our focus has been to repair our standing with the Federal agencies, to restore our Police Department's reputation, and regain their and our
community's trust and confidence. I have personally met with representatives of the Federal Bureau of Investigation (FBI) on numerous occasions to assure them of our commitment to a correct course of conduct.

As you know, earlier this year, we received notification from the DOJ that their investigations were completed with no further findings. As a result of our efforts, in June 2014, the Village was notified that we had gained re-admittance into the Department of Justice Equitable Sharing Program. Moreover, the Police Department gained full compliance status from the Florida Department of Law Enforcement for the Bal Harbour Police Department Communications Unit, which had been found in violation of running unauthorized background checks during an audit in December 2013.

These actions by our state and federal law enforcement partners represent an incredible accomplishment, given how grave the Village's situation was just 12 months ago. A number of new measures and initiatives were also implemented in our Police Department to ensure accountability and a focus on our community's needs going forward:

- Restructured the department to refocus efforts toward a Community Policing Model, with emphasis on high visibly patrol, traffic enforcement and positive citizen police relations;
- Created a new Bicycle Patrol Program and Police Golf Cart Program, which enhance Officers' ability to access and patrol areas where vehicular traffic is not an option;
- Developed a "Response to an Active Shooter Situation" Standard Operating Procedure, as well as provided all officers with specialized training and tactics to effectively and efficiently respond and neutralize incidents of this kind;
- Led efforts to create a partnership with the Anti-Defamation League, Town of Bay Harbor Islands and Town of Surfside Police Departments to establish a Citizen Awareness Program for the local Shuls, with the purpose of training and increasing awareness within the Jewish community on how to detect suspicious activity;
- Hosted a security training session for local hoteliers and businesses
- Created Operational Plans to enhance public safety details during High Holy Days and Major Event Periods (i.e., Labor Day, Fourth of July, etc.).
- Established an off duty walking beat directly funded by the Bal Harbour Shops to ensure additional public safety services within the shops on their busiest days, high impact weekends, and holidays;
- Conducted a detailed Personnel Allocation Study and redeployed patrol resources to provide the highest levels of presence during the times of increased incident activity within the Village;
- Established and implemented a speed reduction and traffic mitigation plan, including: a comprehensive study of the timing of area signalization and a community education and information program called "Twenty is Plenty" to reduce speeding within the gated residential district;
**Bal Harbour**

- Completed traffic softening initiatives, such as the removal of the no right hand turn prohibition west-bound on Harbour Way and the erection of specialized signage to direct Bal Harbour Shops traffic to alleviate congestion during peak hours;
- Developed a comprehensive Hurricane and Severe Weather Operational Plan, with input and coordination from the Miami-Dade Office of Emergency Management, businesses, residents and condominium communities, as well as implemented a Wireless Emergency Notification System; and,
- Coordinated and successfully transitioned eGO Pass Program for the Gated Residential Area from Village Administration to Kent Security.

**Organizational Development & Capacity Building**

Major progress has been achieved in the area of Organizational Development. I believe that our organizational structure is (and should remain) very fluid. We should work to continuously improve our team; and the structure that works today should be able to evolve as our needs grow and evolve. In the past year, however, I carefully evaluated the organizational structure and the individual staff competencies. I have successfully conducted several senior level recruitments, including Police Chief, Finance Director (CFO), Parks and Public Spaces Director, Police Captain and Police Management Services Director. We have consolidated our Information Technology activities, developed an IT Master Plan and funding program, began hardware replacement initiatives and secured comprehensive outsourced IT services. I also combined our Public Works and Parks and Recreation departments into a newly organized and focused Parks and Public Spaces department. I have also met with and established expectations for our various contracted service providers, such as: CAP Engineering; Craig Smith & Associates; Michael Miller & Associates; Munilitycs; Ron Book & Associates; Weiss, Serota, Helfman, et al.

**Other Accomplishments**

Aside from managing the day-to-day operations of the Village, as well as addressing the decision points that had been postponed until my appointment, there have been several high profile projects and agreements, which I inherited that have required a great deal of my time and attention in order to bring them to closure. These issues include:

- Flamingo Way Land Exchange – a land exchange initiated with the Village in 2011 and that culminated in 2014, required that I, along with the Village Attorney, engage in additional negotiations on behalf of the Village. As a result, the Village’s settlement with Flamingo Way Enterprises provides closure to an issue pending resolution since prior to my appointment as Village Manager;
- Consultatio Development Agreement Management – a development agreement, which was executed by the Village in March of 2013, now requires close management due to the impact of the project on the residents’ quality of life, as well as our most vital public area – the beach;
Bal Harbour Shops Expansion Project – arguably the most important decision the Council will have to make, the Bal Harbour Shops Expansion Project requires that the Village carefully analyze and weigh options in order to ensure that all due diligence has been conducted to protect the Village’s interests. As a result, I have put together a team of professionals, who are providing the Village with their expert opinion in matters, such as planning, architecture, land use, traffic engineering and space analysis. Upon my recommendation, the Village has entered into a cost recovery agreement with the Bal Harbour Shops, in order to ensure that the cost for due diligence is not borne by the Village.

CONCLUSION

Any good transition of leadership requires the new incumbent to take appropriate time to learn and understand what the issue drivers are for the community and the organization. Since my appointment as your Village Manager, I have spent a great deal of time meeting with and listening to the many stakeholders and members of our community. As you well know, Bal Harbour is blessed with an active and involved community. A community that is very passionate about Bal Harbour as a place to live and visit – and a community with definite opinions of how they would like to see Bal Harbour evolve going forward.

In order to turn the community’s feedback and vision into tangible results, the budget must fund specific areas of priority. I focused on five (5) key goals, which guided my recommendations. These were as follows:

- Enhancing policing strategies and accountability;
- Improving and beautifying our public spaces;
- Investing in our Information Technology Infrastructure;
- Expanding our communication with our residents and visitors; and,
- Establishing sustainable fiscal policies and planning for future capital investments.

As part of the FY 2014-15 Operating Budget, a series of enhancements were adopted, in order to address a number of areas of concern, which have been highlighted by you and your colleagues, residents and businesses alike. These proposed enhancements were developed by department staff in an effort to improve operational effectiveness and efficiency. Vetted and recommended by the Budget Committee as part of our budget development process, it is important to note that a significant portion of the increased budget for FY 2014-15 is the funding of these enhancements. These enhancements, which will continue to build on the progress already achieved this year, include:

- Creating a Village-wide hardscape cleaning plan;
- Increasing pressure cleaning of Village sidewalks, curbs, gutters and medians from an intermittent basis to four times a year;
Increasing the frequency of trimming of median hedges by adding sixteen additional pruning cycles, as well as a third trimming of date palms per year;

- Improving the appearance of the beach, by establishing a daily Sand Raking Program;

- Funding for the development of Beautification Concept Plan for the Collins Avenue Corridor;

- The establishment of Capital Reserve funding for future capital projects;

- Improve communication with residents and businesses through local quarterly printed and e-newsletters, improved Social Media services, and Web content development through the use of Public Information Officer services;

- Enhanced Fourth of July celebration and a new New Year's Eve fireworks celebration; and,

- The expansion of the current Museum Access Program to include other major cultural institutions such as the Fairchild Tropical Botanical Garden; the Jewish Museum of South Florida; the Ft. Lauderdale Museum of Art; the Ft. Lauderdale Museum of Science and Discovery; and the Frost Art Museum at Florida International University.

Over the next year, my staff and I will be focused on implementing these initiatives and enhancements in order to better serve our community, and provide a higher level of service.

My main priority as your Village Manager is to work with you to make our village government amongst the best in the nation – regarded and recognized as a high performing, quality organization, whose mission and work is focused on diligently and efficiently addressing our community’s needs and priorities. While there is still a lot of work to be done, a great deal has been accomplished this first year. I hope you join me in congratulating and thanking all the members of our team for the significant strides we have made this past year. And, I look forward to many more years of success for us all.

Attachments
SUMMARY OF SIGNIFICANT ACCOMPLISHMENTS

Building
- Issued approximately 1,261 permits representing $79,616,052 in construction costs, and over 1 million dollars in revenue.
- Completed plan review on average within one day per discipline.
- Performed Building inspections within 24 hours of requests. Performed an average of 240 inspections per month.
- Submitted approximately 20 projects to the Architectural Review Board (ARB).
- Ensured that residents receive the maximum discount for flood insurance by securing a 15% discount on flood insurance for residents as a result of the Village's Class 9 rating through the administration of the Community Rating System (CRS).
- Maintain CRS by attending and representing the Village in Local Mitigation Strategy Groups.
- Participated in Insurance Services Office's (ISO) Building Code Effectiveness Grading Schedule which is used to develop insurance rates for individual properties.
- Implemented quality control measures, established an operations manual and implemented a new filing system by increasing staffing levels by one permit clerk supervisor and one full time records manager.
- Implemented a standardized permitting system through the development of a standard operating manual and standardization of forms and letters.
- Issued Certificates of Occupancy within 24 hours of requests.
- Serviced approximately 20 walk-ins per day.

Police
- Worked with the Federal Bureau of Investigations (FBI) Miami Division to conclude the criminal investigation related to the actions of the Bal Harbour Police Department's involvement in the Tri-County Taskforce.
- Gained re-admittance into the Department of Justice Equitable Sharing Program, which the Village has been banned from participating in 2012.
- Gained full compliance status from the Florida Department of Law Enforcement for the Bal Harbour Police Department Communications Unit, which had been found in violation of running unauthorized background checks during an audit in December 2013.
- Restructured the department to refocus efforts toward a Community Policing Model, with emphasis on high visibly patrol, traffic enforcement and positive citizen police relations.
- Created a new Bicycle Patrol Program and Police Golf Cart Program, which enhance Officers' ability to access and patrol areas where vehicular traffic is not an option.
- Developed a "Response to an Active Shooter Situation" Standard Operating Procedure, as well as provided all officers with specialized training and tactics to effectively and efficiently respond and neutralize incidents of this kind.
- Led efforts to create a partnership with the Anti-Defamation League, Town of Bay Harbor Islands and Town of Surfside Police Departments to establish a Citizen Awareness Program for the local Shuls, with the purpose of training and increasing awareness within the Jewish community on how to detect suspicious activity.
- Established an off duty walking beat directly funded by the Bal Harbour Shops to ensure additional public safety services within the shops on their busiest days, high impact weekends, and holidays.
- Conducted a detailed Personnel Allocation Study and redeployed patrol resources to provide the highest levels of presence during the times of increased incident activity within the Village.
- Established and implemented a speed reduction and traffic mitigation plan, including: a comprehensive study of the timing of area signalization and a community education and information program called "Twenty is Plenty" to reduce speeding within the gated residential district.
- Completed traffic softening initiatives, such as the removal of the no right hand turn prohibition west-bound on Harbour Way and the erection of specialized signage to direct Bal Harbour Shops traffic to alleviate congestion during peak hours.
- Developed a comprehensive Hurricane and Severe Weather Operational Plan, with input and coordination from the Miami-Dade Office of Emergency Management, businesses, residents and condominium communities, as well as implemented a Wireless Emergency Notification System.

Parks & Public Spaces
- Successfully integrated Village Service for the Parks and Recreation, Public Works, Landscape Maintenance, Facility Maintenance and the Bal Harbour Shuttle Service into one Departmental.
- Installed $185,000 worth of new and replacement landscape Village wide.
- Initiated the Village wide recycling program for all facilities.
- Produced the inaugural Food Truck Special Event for Village residents.
- Completed needed roof repairs at Village Hall and the Public Works Warehouse.
- Initiated a daily bus shelter service/maintenance program.
- Converted 95% of all Departmental records to a digital format.
- Completed the Beach Jogging Path/Light Bollards Renovation Project.
- Initiated a new LED energy-savings program at Village Facilities.
- Completed $339,000 worth of emergency and scheduled repairs to the Village Utility System.
- Provided daily Bal Harbour Shuttle transportation services to over 23,000 passengers.
- Hosted an average of 72 daily Park users within Bal Harbour Park.

Finance
- Initiated a practice of booking and following up on receivables Village-wide, resulting in the collection of past due revenue in excess of half a million dollars.
- Implemented process improvements requiring review and sign-off on all invoices, wires, and bank reconciliations by Finance Director prior to printing, execution, or completion.
- Analyzed Village revenue and expenditures resulting the production of a FY 2014/15 Budget which eliminates the General Fund subsidy to the Utility, consolidates facilities, transportation, public works, parks and the Utility into the Parks and Opens Spaces Department, consolidated Information Technology and Legal Services into discrete activities for improved monitoring and management; took advantage of the opportunity...
to decrease pressure on Ad Valorem revenue by increasing Local Business Tax rates and Utility rates creating a more sustainable revenue landscape for the future.

- Analyzed Village Fees and prepared a comprehensive Fee Schedule for the Village adopted with the FY 2014/15 Budget.
- Resolved Utility billing adjustments initiated in FY 2012/13.
- Initiated discussions with Miami-Dade County’s Office of Management and Budget to secure $6.5 million in GOB funding for the Village’s water and wastewater utility project through their legislative process.
- Drafted the response to the State for the $600,000 Allocation for the Village’s water and wastewater utility project; State Allocation contract approved at October Council meeting.
- Worked cooperatively with the Department of Justice to bring Federal Forfeiture financial reporting up to date for FY 2011/12 and FY 2012/13.
- Commenced the FY 2013/14 internal audit in October, with onsite review through the first week of November, putting the Village on track for timely issuance of FY 2013/14 financials.
- Produced legislation formalizing the process for the creation of Village Bank Accounts, clarifying the signors and administrator for Village Bank Accounts to improve financial controls for the Village.
- Working with Surfside, Sunny Isles, Bay Harbour, Miami-Dade Transit and the Office of Citizens Transportation Trust to develop complimentary transit circulator routes which will reduce headways and increase the areas served in a more efficient and effective manner for area residents and visitors.

Tourism
- Generated $8,126,603 in Public Relations value and $2,708,867 in advertising value in the media through our Public Relations offices.
- Conducted 1,044 Bal Harbour sales calls globally
- Complete 65 “familiarization” (FAM) visits to Bal Harbour.
- Created a new Bal Harbour event during the International Luxury Travel Market (ILTM) tradeshow which generated an opportunity for the Village’s partners to meet and re-connect with the most important potential and existing clients.
- Bal Harbour Russia and Ukraine Blitz- Bal Harbour hosted several client events targeting travel trade, conducted one-on-one media appointments, and participated in sales calls to agencies. The efforts resulted in an increase in Russian business for 2014.
- Buenos Aires Blitz- Bal Harbour hosted a major client event targeting travel trade, media, and end consumers. Additionally, conducted one-on-one media appointments and sales calls to agencies, efforts resulted in maintaining business levels from Argentina in an economically challenging year.
- Generated significant media coverage, specifically in the real estate space by organizing a visit for St. Regis Bal Harbour General Manager in Buenos Aires including media appointments and small client event. Partnered with American Airlines to announce new daily direct flights from Southern Brazil to, an important market, to Miami.
through a Sales Blitz which consisted of educational seminars for travel trade and media in these new markets: Curitiba, Porto Alegre, and Belo Horizonte.

- Participated in Virtuoso Regional events: Midwest and Westcoast regions and held educational seminar in both regions for Bal Harbour with approximately 100 agents in attendance at each event.
- Participated in Travelweek Brazil with Greater Miami Convention and Visitor Bureau (GMCVB) and conducted successful media visits.
- Montreal Media Blitz, one-on-one meetings with key editors in Montreal. The effort resulted in subsequent journalist visits and significant press clippings for the destination.
- Negotiated a significant upgrade in Departures magazine for March/April issue allowing the Village to purchased one page for $61,490 and received a 4 page advertorial valued at $245,960.
- Negotiated Consumer Revenue report through American Express Partnership. The profile will breakdown analytics and demographic information of all clients that spend in the 33154 area code as well as where our clients are spending, traveling, and consuming elsewhere.
- Conducted our first RFP process to engage a new advertising firm.
- Expanded Unscripted Art Program:
  - Developed and conducted Access Tours throughout South Florida.
  - Expanded the Museum Access Program to include other major cultural institutions.
  - Continued the Bal Harbour Art Chat series, creating a dialogue in Bal Harbour, with some of the most prolific names in the contemporary art world.