



— **Deadline Extended** —

Looking for a Few More Great Candidates

CHIEF FINANCIAL OFFICER

Apply by August 10, 2022

Located in Lee County along Florida's southern Gulf Coast, Estero is approximately 20 minutes south of Fort Myers and 20 minutes north of Naples. It is a delightfully charming town built on a vision of family values and a sense of community pride. It is an upscale community and home to many retirees. For the most part, they live in one of 45 gated communities. Most importantly it is a diverse community and residents are friendly and enjoy their neighbors.

The Village hosts two large parks, both relatively close to its center. The first is Estero Community Park, a 55 acre park owned and operated by the County. It is an active sports park with sports fields aplenty as well as an amphitheater, jogging/walking path, and opportunities for bird watching. The second is the 135 acre Koreshan State Historic Site, owned and operated by the State of Florida. It is more oriented towards individual outdoor activities including fishing, picnicking, and boating, as well as camping, canoeing, hiking, and wildlife viewing. Amenities include a



campground, boat ramp, canoe rentals, trails and a picnic area on the Estero River. Beach activities along the Gulf, and kayak rentals on the river are available within a relatively short distance outside the park.

The Village has over 20 high quality golf courses, world-class fishing, boating, and a major Arena (with three ice sheets and providing the largest venue for concerts). Numerous other recreational opportunities are readily available.

For those who like to shop in person, Estero is home of the two largest regional, malls—Coconut Point and Miromar Outlets. Both draw customers as throughout the county and from nearby counties. In fact, 60% of their business comes from outside the immediate the area.

Health care options in Estero and south Lee County are growing quickly in both range and depth of service. Two major systems serve the Estero area. Lee Memorial Health System, (LMHS) located throughout Lee County. The other, NCH Healthcare System, is located in nearby Collier County. Based on the tremendous growth in the area, two additional large medical facilities are in the discussion stage and are likely to be built with the next few years. Independent fire/rescue districts in conjunction with the County offer a high level of emergency medical response.

Overall, Estero is quite safe. Per Neighborhood Scout, Estero's violent crime is 75% below the state average and property crime is 50% below the state average.

Educational opportunities for both children and adults are excellent. Lee County Public School District provides for the public education needs of Estero with 120 schools in the County. In addition to K through 12 schools, there are 15 special center and community schools, 24 charter schools and 3 vocational schools. Estero hosts one K-5, one 6-8 and one high school. In addition, just outside the village limits lies the highly regarded Florida Gulf Coast University, and surrounding Lee County is home to eight other colleges and universities.

For those who like to travel, Southwest Florida International Airport is about 8 miles north of the Village and is an outstanding facility served by 14 airlines including Alaska Airlines, American, Avelo, Breeze, Delta, Frontier, JetBlue, Southwest, Spirit, Sun Country, United, and Westjet. International carriers providing service are Eurowings (Lufthansa) and Air Canada. Needless to say, if you live in Estero, you are 15 minutes from flying anywhere in the world.

A bit more locally, the entrance to the famed Everglades National Park is an hour southeast by car. The world renowned theme parks of Disney World and Universal Studios are a bit over three hours northeast, while LegoLand is on the way. Tampa is about two hours north and Miami and Fort Lauderdale are about two and a half hours east. If you like to cruise, the Port of Miami is the busiest cruise embarkation port in the world while Fort Lauderdale ranks third. Or drive to Fort Myers and take a four hour ride on the express ferry to Key West where you can dive, dine, fish, or just hang out and enjoy the local culture.

The Village provides high-quality services at a low tax rate. That and the availability of numerous recreation and cultural options as well as the proximity to larger metropolitan areas make it easy to understand why the Estero area is one of the fastest growing markets in the nation. It is simply a wonderful place to live, work, play, and be the Finance Director!

HISTORY

Early settlers to the Estero area were Native American fishing families who were attracted by the spring-fed Estero River. The modern history of Estero began in 1894 when Cyrus Teed and his followers purchased and occupied a 320-acre tract in 1894 and established the Koreshan Commune.

Teed proposed a theory that we live on the inside of the Earth's outer skin, and that celestial bodies are all contained inside the hollow Earth. They were business-oriented, lived communally, and prospered enough to create their own political party and to incorporate the town of Estero (September 1, 1904). The 1908

death of Dr. Teed (who claimed to be immortal) was a critical blow to the group's faith, and membership dwindled. This original tract is now owned by the state of Florida as the Koreshan State Historic Site. At some point the Village was disbanded.

Serious growth in the area began again in the 1990s. For a significant part of the subsequent period, the area was content to be a portion of unincorporated Lee County. That changed after 2013 when neighboring Bonita Springs began to annex north. The community felt it needed to act quickly or it would lose its identity.

Then Hertz announced it was moving its world headquarters to Estero. Historically, local architecture had been consistently Mediterranean. Instead, Hertz proposed a glitzy, modern steel and glass structure which the County approved. While residents were excited about the opportunity Hertz presented, they were disappointed in the headquarters facilities. They realized they had no control over what was built in their community and at the County's whim when it came to development. They also were a donor community and wanted more of their tax dollars to stay home.

In November 2014, 86% of the residents voted to become the Village of Estero. Incorporation officially occurred in December 2014, and the Village Council took office in March of this year. Since then, it has implemented the Government Lite concept—the Village only has 12 employees. Residents are pleased with the results and having a voice in their destiny. Today the Village is 90% built out.

DEMOGRAPHICS

With its many amenities and wonderful residents, it is easy to see why Estero has become a destination for retirees and those who will retire soon. Table I (right) reflects that. The median age of the Village's residents is 27 years higher than the national average.

Table I: Estero Demographics

Distribution by Race		Distribution by Age	
White	88.1%	0 to 15	9.4%
Black	1.4%	15 to 25	4.5%
Asian	2.1%	25 to 45	12.2%
Native American	0.1%	45 to 65	21.9%
Two or More Races	8.3%	65 to 85	47.7%
Total	100%	85 +	4.3%
Hispanic Ethnicity	7.8%	Estimated Population: 36,939	

Educational Achievement (Over Age 25)	
High School or Higher	95.7%
Bachelor's Degree or Higher	48.3%

Other Statistics	
Median Age—Estero	65.9
Median Age—U.S.	38.5
Median Household Income—Estero	\$88,803
Median Household Income—U.S.	\$61,937
Poverty Rate	6.6%

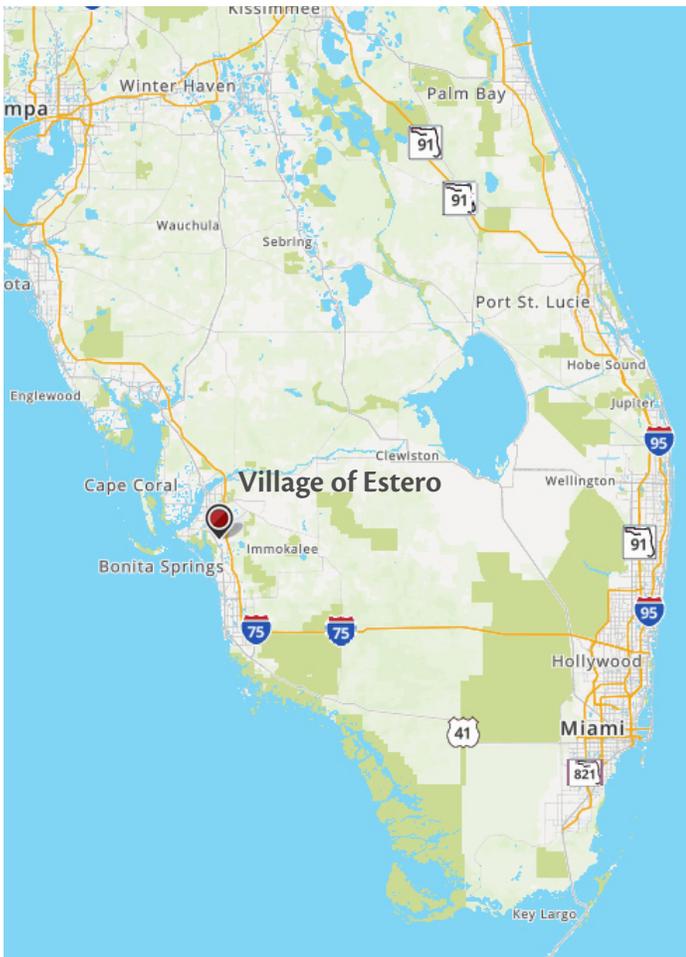
Source: U.S. Census Bureau

CLIMATE

Estero has a subtropical climate, with hot and wet summers and warm and dry winters. The average highs for summer are around 93°F, while the average lows are in the mid-70s. Winter highs are in the mid to high 70s, with temperatures averaging in the mid-50s at night. Estero has more than 300 sunny days annually. Average annual precipitation at 55.6 inches.

While the Village is free of frost and snow, it is subject to the occasional tropical storm. The last major storm to visit the region was Hurricane Irma in 2017.

Figure I: Location of Estero



GEOGRAPHY

Estero is located in Southwest Florida on the Gulf Coast. It is equidistant between Naples and Fort Myers. It is 150 miles southeast of Tampa, 200 miles southwest of Orlando, and 125 miles from Florida’s Atlantic Coast. See Figure 1 (left) for more information. It averages 13 feet above sea level.

COMMERCE

While Estero is largely residential, its local business community is lively and welcoming. It is working hard to lure businesses to the community and it has been successful.

Looking beyond Estero’s village limits, the largest employers in Lee County are displayed in Table II. See below.

THE GOVERNMENT

Established effective December 31, 2014, the Village’s vision was and is to maintain and enhance its already unique quality of life, distinct character, diverse housing, economic and social opportunities, and natural resources. It firmly believes that effective planning is the key to achieving this vision.

Table II: Principal Employers, Lee County, FL

Employer	Industry	Employees
Lee Memorial Health Systems	Healthcare Services	13,595
Lee County School District	Education	12,936
Lee County Government	Government	9,038
Publix Super Markets	Retail	4,624
Florida Gulf Coast University	Education	3,430
Walmart Corporation	Retail	3,067
City of Cape Coral	Government	2,253
Hope Hospice	Home Healthcare	1,630
McDonald’s	Restaurant	1,482
Florida Southwestern State College	Education	1,441

Source: Village of Estero, FL 2021 CAFR

Estero utilizes the Council-Manager form of government where the Council sets policy and the Village Manager oversees the day-to-day operations. The Village Council consists of seven members, each representing a geographic district. Members must reside in the district they represent but chosen by a vote of all Village’s electors. The Council Members serve staggered four year terms with elections falling in November of odd numbered years. The next election is in November 2023 when three of the Council seats will be before the voters. The



Mayor and Vic-Mayor are selected by the Council from its members and serve two year terms. All of the elected officials want what is best for the Village and are friendly, professional and collegial. They have a great deal of respect for the staff.

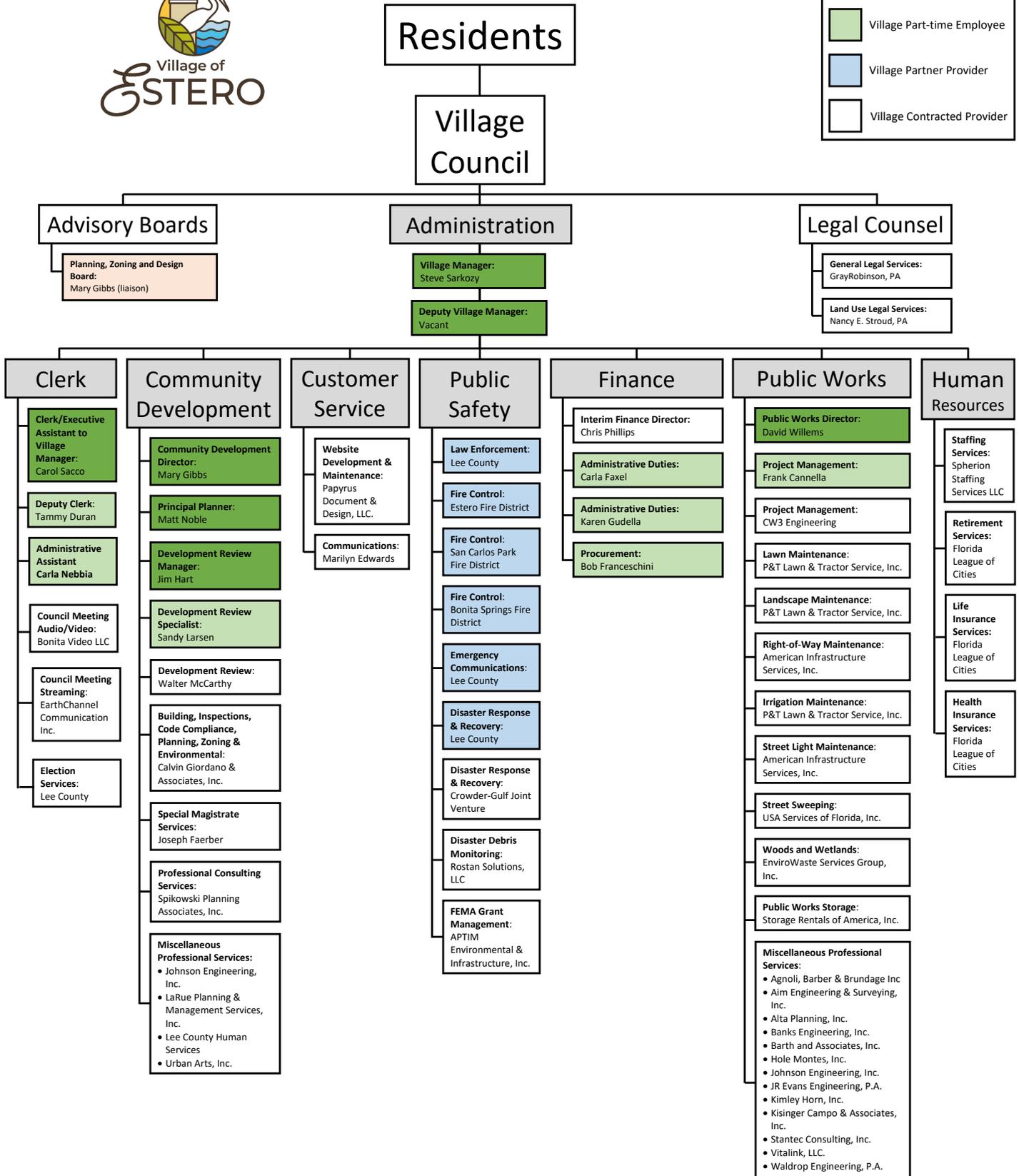
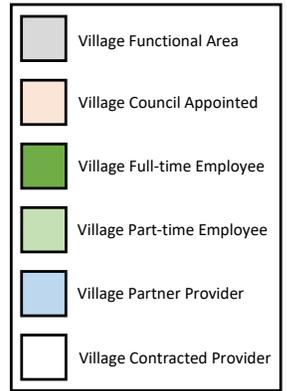
The Village Manager and Village Attorney are appointed by the Council. The Village Clerk is appointed by the Manager with consent of the Council.

The Village embraces the “Government Lite” concept and only has 12 FTE employees. (See page 6) These include the Village Manager, Deputy Village Manager, Village Clerk-Executive Assistant to the Village Manager, and two part-time staff, Deputy Village Clerk and Administrative Assistant, the Community Development Director, Development Review Manager, Principal Planner and part time Development Review Specialist, Finance Director and three support staff (two finance technicians and a procurement manager), and a Public Works Director and two part-time positions (a project manager and a technician). The services these individuals oversee are provided via contract with third party vendors.

The Estero and San Carlos fire rescue districts, along with Lee County, provide the Village’s fire/rescue services. The former are independent special districts, have their own taxing authority, and are funded by the taxes they render. The County Sheriff provides police services, and they are paid for by resident taxes. Water and sanitary sewer are provided by Lee County and Bonita Springs Utilities. The major thoroughfares are state and county roads. Almost all the local roads lie within gated communities and as such are the responsibility

Organizational Chart

Fiscal Year 2021-2022



of the homeowners' associations. That leaves about 25 miles of road for the Village to maintain. When all is said and done, the Village provides planning, zoning, building, some roads and stormwater services within its limits while overseeing public safety.

The Village's General Fund Revenue Budget for FY 2021/2022 is approximately \$13.1 million and the Total Budget of \$15.2 million. The Village's General Fund Expenditure Budget, on the other hand, for FY 2021/2022 is approximately \$19.7 million with a Total Expenditure Budget of \$21.6 million. The difference is primarily accounted for by capital projects to the tune of \$1.9 million and paid from reserves accumulated for that purpose. These projects were anticipated based on professionally prepared Master Plans in each area of functional responsibility. All Capital Improvement Projects are funded on a "pay-as-you-go" basis from available funds. Overall, the Village is in extremely good financial condition with three (3) months operating reserves.

THE FINANCE DEPARTMENT

The Finance Department is a very small operation with support coming, as needed, from other key Village staff and third party contractors. Given the Village operates on the government lite concept and the vast majority of its operations are performed by contractors, the volume of documents and transaction passing through the Finance Department is significantly less than in a traditional municipality.

THE CHALLENGES AND OPPORTUNITIES

Estero is very, very sound financially. To be specific, the Village is entirely debt free. It has a three-month Operating Reserve (and growing) and a Litigation Reserve of \$670,000 as well as Major Road and a Minor Road Replacement Reserve. The Village also has the lowest millage rate in the entire region, if not the lowest millage rate in the State. The Village has lowered its millage rate in five (5) of the seven (7) years since incorporation (the exceptions being the first year when revenues were not yet certain and in 2020 when the effects of COVID were not fully known).

The biggest challenge the new Finance Director will face is maintaining the current level of outstanding financial operations. As such, it is very low stress position.

THE IDEAL CANDIDATE

The Village is seeking for a Finance Director who is both an outstanding financial manager and technician. The individual will work well with both the Village Council and the Village Manager and be seen as a trusted advisor. He/she will keep everyone well informed. The ideal candidate will be knowledgeable and confident and not afraid to speak truth to power. The Village Manager expects to be told what he needs to hear as opposed to what he might prefer to hear. The best candidate will believe strongly in transparency and keeping the public informed.

When presenting a problem or issue, the ideal candidate will bring forth proposed solutions and options. The individual will constantly demonstrate honesty, integrity, and diplomacy as well as a healthy sense of impatience. Estero is not a typical municipal government where projects to move forward slowly and issues are studied extensively. The best candidate will believe strongly in customer service and understand residents/customers are not always right but deserve to have their problems listened to and addressed to the degree possible.

The Finance Director position in Estero is very hands on and will require someone with expertise in all areas of municipal finance. The individual should be comfortable functioning at all levels within the department ranging from making journal entries to producing the Certified Annual Financial Report.

Personally, the best candidate will be professional and analytical, but also friendly and outgoing with a sense of humor. The ideal candidate must have outstanding verbal and written communication skills while being someone who works collaboratively. As the individual is ultimately responsible for maintaining the Village's financial data, he/she will have a strong accounting background and ensure the numbers are accurate.

He/she produce reports that are understandable even to those without financial background. The Director will make clear and concise presentations to the Village Council and public.

The new Director's background will include experience in budget preparation, CAFR preparation, purchasing, and customer service. The ideal candidate will have a bachelor's degree from an accredited college or university in Business or Public Administration, Accounting, Public Finance, or related field plus a minimum of eight (8) years of experience in Accounting and Financial Management for a governmental agency. Credentialing as a Certified Public Accountant or Certified Government Finance Officer is desired.

COMPENSATION

The salary range is \$145,000 to \$165,000. Benefits are very good but not extravagant.

THE CURRENT FINANCE DIRECTOR

The current Finance Director has been with the Village since its inception and is retiring.

RESIDENCY

Residency within the Village limits is not required.

INTERNAL CANDIDATES

With such a small staff, the Village does not have any internal candidates who meet the above described qualifications.

HOW TO APPLY

E-mail your cover letter and resume to Recruit39@cb-asso.com by August 10, 2022. Faxed and mailed resumes will not be considered. Questions should be directed to Colin Baenziger at (561) 707-3537, or Stephen Sorrell at (513) 317-0678,

CONFIDENTIALITY

Under Florida's public records act, once an application is submitted, it is deemed a public record. As a practical matter, we would shocked if this recruitment drew any media coverage.

THE PROCESS

Applications will be screened upon arrival. Interviews will be held on September 3rd with a selection shortly thereafter. Please note that these dates are somewhat tentative and the Village may well move more quickly depending on the response.

IMPORTANT INFORMATION

The Village of Estero is an Equal Opportunity Employer and encourages women, minorities and veterans to apply. Under the Florida Public Records Act, all applications are subject to disclosure upon receipt. A veteran's preference will be awarded if applicable under Florida law.

ADDITIONAL INFORMATION

For additional information about the Village, visit:

estero-fl.gov