



STAFF REPORT

DATE: June 1, 2021

CONSENT

TO: Honorable Mayor and City Council

AGENDA ITEM: Professional Services Agreement with Raftelis

SUBMITTED BY: Jake Dickson, Assistant City Administrator

BACKGROUND:

The City Council included in the 2021 budget funds for an Operational Audit of the Planning and Building Departments. A request for proposals was advertised in February of 2021, and Council invited 3 firms to present their proposals at the May 11 City Council Workshop. At the May 18th meeting the Council selected Raftelis to perform the audit and directed staff to prepare a professional services agreement. The agreement was prepared by the City attorney and reviewed by Raftelis.

ISSUE BEFORE COUNCIL:

Should Council approve the professional services agreement with Raftelis?

PROPOSAL DETAILS/ANALYSIS:

Included in your packet is a copy of the city's standard professional services agreement. The proposal from Raftelis is included as Exhibit A.

FISCAL IMPACT:

The not-to-exceed cost of the agreement is \$49,500. \$30,000 was budgeted for the performance of the operational audit.

OPTIONS:

- 1) Approve Professional Services Agreement with Raftelis
- 2) Amend and then approve Professional Services Agreement with Raftelis
- 3) Select another firm

RECOMMENDATION:

If removed from the consent agenda:

"Motion to approve the professional services agreement with Raftelis."

ATTACHMENT:

- Professional Services Agreement

AGREEMENT FOR PROFESSIONAL SERVICES

This Agreement for Professional Services (this "Agreement"), made this ____ day of _____, 2021, by and between the City of Lake Elmo, a Minnesota municipal corporation with its principal office located at 3880 Laverne Ave N., Suite 100, Lake Elmo, Minnesota 55042 (the "City"), and Raftelis Financial Consultants, Inc., a North Carolina corporation with its principal office located at 227 West Trade Street, Suite 1400, Charlotte, NC 28202 ("Contractor").

I. SERVICES TO BE PROVIDED.

Contractor will provide operational audit services to the City for the City's Planning and Building Department, as more particularly described in Contractor's proposal which is attached to this Agreement as Exhibit A (the "Services"). All Services provided by Contractor under this Agreement shall be provided in a manner consistent with the level of care and skill ordinarily exercised by professional consultants currently providing similar services.

II. COST OF SERVICES.

A. Contractor shall perform the Services outlined in this Agreement and its proposal at the rates set forth in Exhibit A at a not to exceed cost of \$49,500 (the "Professional Fees"). Contractor shall invoice the City on a monthly basis for the Services performed by Contractor. The invoice must include the number of hours and a description of the Services performed by Contractor. Payment to Contractor by the City shall be due within 30 days of the date of the invoice.

B. The City shall not be responsible for payment for any additional costs or work performed by Contractor that are outside the scope of this Agreement that are not expressly pre-approved by the City.

III. CITY'S RESPONSIBILITIES.

Upon request, the City shall provide Contractor with all available relevant materials pertaining to completion of the Services.

IV. TERM AND TERMINATION OF AGREEMENT.

The term of this Agreement shall commence, and Contractor shall commence performing the Services on _____, 2021. This Agreement shall terminate, and Contractor shall complete all Services to be performed under this Agreement no later than _____, 2022. This Agreement may be terminated earlier by either party by giving 30 days' written notice to the other party. Upon termination, Contractor shall be paid by the City for all Services rendered by Contractor and all other pre-approved costs incurred by Contractor as of the date of the termination for which Contractor has not yet been compensated.

V. INDEPENDENT CONTRACTOR.

All Services provided pursuant to this Agreement shall be provided by Contractor as an independent contractor and not as an employee of the City for any purpose. Any and all officers, employees, subcontractors, and agents of Contractor, or any other person engaged by Contractor in the performance of the Services pursuant to this Agreement, shall not be considered employees of the City. Any and all actions which arise as a consequence of any act or omission on the part of Contractor, its employees, subcontractors, or agents, or other persons engaged by Contractor in the performance of Services pursuant to this Agreement, shall not be the obligation or responsibility of the City. Contractor, its employees, subcontractors, or agents shall not be entitled to any of the rights, privileges, or benefits of the City's employees, except as otherwise stated in this Agreement.

VI. INDEMNIFICATION.

Contractor, and subcontractors, of Contractor, shall indemnify, defend, and hold harmless the City and its officials, employees, contractors and agents from claims, losses, liabilities, and expenses (including reasonable attorneys' fees and expenses of litigation) caused by any negligent act or omission by Contractor, engaged by Contractor in the performance of the Services pursuant to this Agreement. Likewise, the City agrees that it will indemnify, defend, and hold harmless the Contractor, and its employees, subcontractors, and agents of Contractor against any and all claims, losses, liabilities, and expenses (including reasonable attorneys' fees and expenses of litigation), which the Contractor may hereafter sustain, incur, or be required to pay arising out of the actions of the City pursuant to this Agreement.

VII. INSURANCE.

Contractor agrees to maintain, at its expense, statutory workers' compensation insurance coverage. Contractor also agrees to maintain, at its expense, general liability insurance coverage insuring Contractor against claims for bodily injury, death, or property damage arising out of Contractor's general business activities (including automobile use). The liability insurance policy shall provide coverage for each occurrence in the minimum amount of \$1,500,000. Upon request of the City, Contractor shall provide the City with certificates of insurance, showing evidence of the required coverage and listing the City as an additional insured.

VIII. MISCELLANEOUS PROVISIONS.

A. Entire Agreement.

This Agreement shall constitute the entire agreement between the City and Contractor and supersedes any other written or oral agreements between the City and Contractor. This Agreement can only be modified in writing signed by the City and Contractor.

B. Data Practices Act Compliance.

Data provided, produced or obtained under this Agreement shall be administered in accordance with the Minnesota Government Data Practices Act, Minnesota Statutes, Chapter 13. Contractor will immediately report to the City any requests from third parties for information relating to this Agreement. Contractor agrees to promptly respond to inquiries from the City concerning data requests.

C. Choice of Law and Venue.

This Agreement shall be governed by and construed in accordance with the laws of Minnesota. Any disputes, controversies, or claims arising under this Agreement shall be heard in the state or federal courts of Minnesota and the parties waive any objections to jurisdiction.

D. No Assignment.

This Agreement may not be assigned by either party.

E. Compliance with Laws.

Contractor shall exercise due professional care to comply with applicable federal, state, and local laws, rules, ordinances and regulations in performing the Services under this Agreement.

IN WITNESS WHEREOF, the parties hereto have executed, or caused to be executed by their duly authorized officials, this Agreement in duplicate on the respective dates indicated below.

CITY OF LAKE ELMO

By: _____
Charles Cadenhead
Its: Mayor

By: _____
Julie Johnson
Its: City Clerk

**RAFTELIS FINANCIAL CONSULTANTS,
INC.**


By:  _____
Michelle L. Ferguson
Its: Vice President

EXHIBIT A

Contractor's Proposal



A PART OF



Planning and Building Department Operational Audit

PROPOSAL / MARCH 19, 2021

City of Lake Elmo





Diversity and inclusion are an integral part of Raftelis' core values.

We are committed to doing our part to fight prejudice, racism, and discrimination by becoming more informed, disengaging with business partners that do not share this commitment, and encouraging our employees to use their skills to work toward a more just society that has no barriers to opportunity.

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Photo on cover courtesy of Greg Gjerdingen (Flickr)

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Fee

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March 19, 2021



Mr. Jake Dickson, Assistant City Administrator
City of Lake Elmo
3880 Laverne Avenue N, Suite 100
Lake Elmo, MN 55042

Subject: Proposal for Planning and Building Department Operational Audit

Dear Mr. Dickson:

On behalf of The Novak Consulting Group, now a part of Raftelis, I am pleased to submit this proposal for an operational audit of the Planning and Building Department. Our focus has always been to help local government and utility clients solve their financial, organizational, and technology challenges. We are dedicated to providing management consulting services to local governments and utilities. We appreciate the opportunity to submit our proposal, which has been developed to provide the City with concise yet thorough information that introduces our approach to organizational assessments and staffing analyses.

Raftelis was established in 1993 to provide financial and management consulting services of the highest quality to the public sector. The Raftelis brand strengthened with the 2020 acquisition of The Novak Consulting Group (TNCG), which deepens our management consulting expertise specific to local governments. Our mission is to strengthen organizations for those they serve and those who work in them.

We believe our firm offers the City several distinct advantages:

- **A workable and insightful approach:** Our team's approach specifically addresses the City's needs and will help develop a best practice-level plan to ensure the City's Planning and Building Department operates at peak efficiency and effectiveness for the Lake Elmo community.

In this current COVID-19 environment, prioritization and planning are even more critical as the financial impacts of the pandemic remain unknown. The City's desire for gained organizational/operational efficiencies and effectiveness is the exact type of consulting work our firm performs.

- **An experienced team who knows the challenges and opportunities faced by local governments:** We are skilled professionals with direct experience in all facets of local government and utility operations. We work solely for local governments and utilities, and many of our team members were local government leaders in some of the best organizations across the country. Our team members understand what is required to deliver effective public services.
- **Personal service from senior-level consultants:** You appreciate it when deadlines are met, phone calls are returned, and your challenges are given in-depth, out-of-the-box thinking. While some firms may assign your business to junior-level people, we offer exceptional service from senior-level consultants.

We are proud of the resources that we can offer and welcome the opportunity to assist the City in this engagement. If you have any questions, please do not hesitate to contact our Organizational Assessment Practice Leader using the following contact information:

Person Authorized to Represent the Company Regarding All Matters Related to the Proposal:

Michelle Ferguson, Vice President – Organizational Assessment

Phone: 828.777.6588 / Email: mferguson@thenovakconsultinggroup.com

Sincerely,



Julia Novak

Executive Vice President



Who We Are

RAFTELIS AND THE NOVAK CONSULTING GROUP, STRENGTHENING ORGANIZATIONS FOR THE COMMUNITIES THEY SERVE AND THE PEOPLE WHO WORK IN THEM

Raftelis/TNCG provides public-sector organizations with insights and expertise to help them operate as high-performing, sustainable entities providing essential services to their citizens. We help our clients solve their financial, organizational, technology, and communication challenges, achieve their objectives, and, ultimately, make their communities better places to live, work, and play.

TNCG is Now Part of Raftelis

The Novak Consulting Group and Raftelis have always shared a focus on delivering lasting solutions for public-sector agencies. In January 2020, The Novak Consulting Group joined Raftelis. Today, we provide our clients with wide-ranging capabilities and resources in financial, management, technology, and communications consulting for all areas of local government. Our clients now have the expertise of more than 120 of the country's leading public sector consultants, who have decades of local government experience. We know that our combined capabilities and resources will provide added value to our clients, and we're excited about what we can accomplish together.

The Right Fit



RESOURCES & EXPERTISE

This project will require the resources necessary to effectively staff the project and the skillsets to complete all of the required components.

With over 120 consultants, Raftelis/TNCG has one of the largest local government management and financial consulting practices in the nation. Our depth of resources will allow us to provide Lake Elmo with the technical expertise necessary to meet your objectives. In addition to having many of the industry's leading management and financial consultants, we also have experts in key related areas, like stakeholder engagement and data analytics, to provide additional insights as needed.



DECADES OF COLLECTIVE EXPERIENCE

Our associates and subject matter experts have decades of experience in strengthening local municipalities and nonprofit organizations.

They've served in a wide range of positions, from city manager to public works director to police chief.



PERSONAL SERVICE FROM SENIOR-LEVEL CONSULTANTS

You appreciate it when deadlines are met, phone calls are returned, and your challenges are given in-depth, out-of-the-box thinking.

While other firms may assign your business to junior-level people, our approach provides exceptional service from senior-level consultants.



NICHE EXPERTISE

Our expertise lies in strengthening public-sector organizations.

We're consulting specialists rather than generalists, focusing our strengths to do a highly effective job for a specific group of clients.

How we stack up

27 years
serving the
public sector

OUR TEAM INCLUDES

120+ consultants focused on
finance/management/communication/
technology for the public sector

RAFTELIS HAS PROVIDED ASSISTANCE FOR

1,200+ public agencies
and utilities

that serve more than

25% of the
U.S. population

including the agencies serving

38 of the nation's
50 largest cities

In the past year alone, we worked on

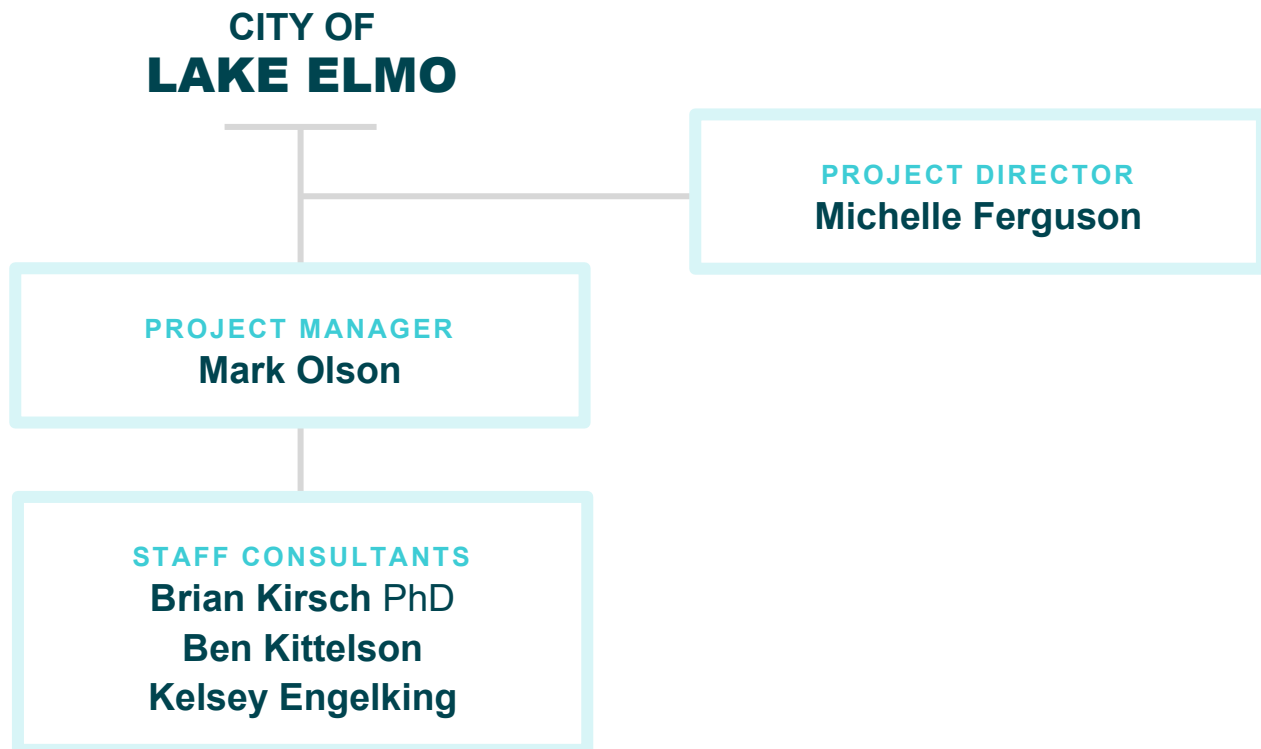
900+ projects for **600+** agencies in **44** states

Project Team

WE HAVE DEVELOPED A TEAM OF CONSULTANTS WHO SPECIALIZE IN THE SPECIFIC ELEMENTS THAT WILL BE CRITICAL TO THE SUCCESS OF LAKE ELMO'S PROJECT.

Our project team is made up of senior-level consultants with direct local government experience. What sets our project team apart is our ability to explore and relate to local community values while at the same time investigating realistic approaches for cost-effective solutions.

An organizational chart of our project team is as follows.



Michelle Ferguson

PROJECT DIRECTOR

Vice President

ROLE

Michelle will direct the entire project and ensure client satisfaction with the quality of our work.

PROFILE

Michelle has nearly 25 years of management experience with and for local governments across the country.

As organizational assessment practice leader for The Novak Consulting Group, Michelle spearheaded the work of nearly 200 local government reviews in some of the foremost governments across the country. Michelle has completed detailed organizational reviews of entire jurisdictions and recommended improvements to the structure, staffing, and processes within departments of all sizes. Specific department reviews have included development review, parks and recreation, public works, human services, human resources, capital budgeting, and finance.

As a Lean certified professional, Michelle excels at helping local governments continuously improve and rely on data to make informed choices about services to the public. She is skilled in project management, process improvement strategies, performance measurement, consent building, and public process design. Additionally, she has provided customized training in the development and use of performance measures to assist numerous organizations continuously improve service delivery.

Michelle is also a skilled facilitator, able to bring diverse groups of people together to articulate shared visions and priorities. She has led strategic planning engagements at the community, organizational, and department levels, and she has facilitated numerous staff and governing body retreats.

Michelle began her consulting career in 2005 following ten years of direct experience in local government management, which included serving as assistant county manager in Arlington County, Virginia. During her tenure with Arlington County, Michelle oversaw the daily management and implementation of the County's capital program. She also led the organization-wide performance measurement initiative establishing their Balanced Scorecard. Before Arlington County, Michelle served as assistant city manager in Overland Park, Kansas.

Michelle earned a bachelor's degree in political science from Loyola University-Chicago and a master's degree in public administration from the University of Kansas. She is a member of the International City/County Management Association. She also served as the president of the Metropolitan Association of Local Government Assistants in Washington, D.C, and has presented at state and national conferences on topics such as strategic planning, effective governing bodies, and council-staff relations.



Specialties

- Organizational assessment
- Staffing analysis
- Process improvement
- Performance management
- Capital planning
- Strategic planning
- Facilitation
- Community engagement

Professional History

- Raftelis/The Novak Consulting Group: Vice President (2021-present); Organizational Assessment Practice Leader (2009-2020)
- Management Partners: Senior Management Advisor (2005-2009)
- Arlington County, Virginia: Assistant County Manager (2002-2005)
- City of Overland Park, Kansas: Assistant City Manager (1996-2002)

Education

- Master of Public Administration - University of Kansas (1998)
- Bachelor of Arts in Political Science - Loyola University, Chicago (1996)

Certifications

- Lean Certified

Professional Memberships

- International City/County Management Association (ICMA)
- Engaging Local Government Leaders (ELGL)

Mark Olson

PROJECT MANAGER

Senior Manager

ROLE

Mark will serve as the primary client contact for the work and supervise the work of our project team to ensure the project is on time and on budget.

PROFILE

Mark brings 30 years of consulting and local government service to the team. As a consultant, Mark's work includes financial and management audits, organization and management consulting, productivity and benchmarking studies, and cost analysis and process improvement projects for state and local governments.

His clients have ranged from large state agencies to small, independent local governments across the nation. Areas of work include financial and operational reviews in a wide variety of service areas. He employs a collaborative approach with clients in developing information, assessing alternatives, and producing solutions. Mark also uses a variety of tested study approaches that are customized to meet the particular objectives of the project or client.

Whether the project takes the form of a comprehensive government review or a single agency review to meet a variety of project purposes, Mark has led or participated in these reviews in virtually every area of government service provision at the local level. These reviews involved issues such as financial/operational sustainability, staffing level reviews, strategic planning, budgeting, resource allocation, performance measurement, process studies, best practices and benchmarking analyses, compliance reviews, alternative service delivery, and operational improvement. These projects have involved service areas such as finance, accounting, purchasing, human resources, planning, community development, public works, parks and recreation, police, fire, emergency medical services, emergency communications, school administration, library administration, and museum administration. This wide-ranging issue and agency background provides him with a breadth of knowledge, skills, and abilities that he applies to every project. In addition to comprehensive government reviews, Mark has led multiple-agency reviews to identify opportunities for shared services or alternative service delivery. These projects have included emergency communications reviews, inter-jurisdictional service sharing, and consolidation.

Mark earned a master's degree in public policy studies with an emphasis on financial and operations analyses from the Harris Graduate School of Public Policy Studies at the University of Chicago. Mark also holds a bachelor's degree in political science and a bachelor's degree in sociology from the University of Illinois at Urbana-Champaign.



Contact

19 Garfield Place, Suite 500,
Cincinnati, OH 45202
P: 513.221.0500
E: molson@raftelis.com

Specialties

- Local government budgeting and financial management
- Strategic and tactical planning
- Organizational assessment
- Business process improvement
- Change management

Professional History

- Raftelis/The Novak Consulting Group: Senior Manager (2021-present); Manager (2020)
- DuPage County, Illinois Health Department: Chief Financial Officer/Director of Business Resources (2014-2020)
- Financial, Operations and Management Consulting (1997-2014)
- Forest Preserve District of DuPage County: Budget and Management Coordinator (1994-1997)
- Illinois Department of Transportation: Budget Development Coordinator (1991-1994)
- Illinois Office of Management and Budget: Capital Program Analyst (1988-1991)

Education

- Master of Arts in Public Policy - University of Chicago (1998)
- Bachelor of Arts in Sociology - University of Illinois at Urbana-Champaign (1985)
- Bachelor of Arts in Political Science - University of Illinois at Urbana-Champaign (1985)

Professional Memberships

- Government Finance Officers Association (GFOA)
- Institute of Management Accountants

Brian Kirsch PhD

STAFF CONSULTANT

Senior Consultant

ROLE

Under Mark's supervision, Brian will undertake interviews, document review and analysis, and preparation of deliverables.

PROFILE

Brian has a background in water resources management and possesses extensive analytical skills. His expertise lies in the areas of systems analysis and economic modeling. He has performed significant research in the field of water resources in which he has utilized aspects of engineering, policy analysis, risk management, economics, and market analysis.

KEY PROJECT EXPERIENCE

Incline Village General Improvement District (CA)

The Incline Village General Improvement District (IVGID) provides water, wastewater, and recreational services to an area in the Lake Tahoe region. The IVGID is anticipating significant capital costs due to aging infrastructure and has experienced sizable staff turnover recently. Brian is part of the team that will be conducting an Operational Review of the water and wastewater components of the IVGID and will be conducting staff interviews and performing an on-site evaluation. In particular, this study is intended to provide IVGID with recommendations to improve their asset management.

American Water Works Association

At the onset of the Covid-19 pandemic, the American Water Works Association (AWWA) was concerned with the potential financial impacts that the shutdowns may have on the water industry. Brian was part of a team at Raftelis that made estimates of potential impacts through changes in usage, construction, and delayed capital projects. The analysis and report were turned around to AWWA in less than two weeks.

City of Dayton (OH)

The City of Dayton (City) is receiving pressure from wholesale customers as to their overall headcount and rates. Raftelis has been asked to conduct an Operational Assessment that is expected to address the efficiency of their operations and their staffing. Brian is part of the team that has been asked to conduct this review.

City of Wichita Falls (TX)

The City of Wichita Falls (City) experienced their drought of record across several years in the 2010's, in which the City's water supply was nearly completely depleted before the drought broke. The City is concerned about the long-term adequacy of its water supply and the devastating economic impacts should a similar drought occur again. The City intends to build an additional reservoir. In order to build public support for this reservoir, Raftelis was asked to conduct an economic analysis of this reservoir, including both economic and fiscal impacts. Brian is leading the analysis, which is considering everything from the economic benefits of the construction of the reservoir, to the loss of cattle ranching, to increased recreation activities.



Specialties

- Rate studies
- Financial planning
- Risk management
- Economic analysis
- Water resources management
- Data analysis

Professional History

- Raftelis: Senior Consultant (2018-present); Consultant (2014-2017)
- Colorado School of Mines: Postdoctoral Research Fellow (2011-2014)
- University of North Carolina - Chapel Hill: Research Assistant (2001-2010)

Education

- Masters of Science & Doctorate - University of North Carolina at Chapel Hill (2004 & 2010, respectively)
- Bachelor of Science in Chemical Engineering & Bachelor of Arts in Environmental Engineering - Rice University (2001)

Ben Kittelson

STAFF CONSULTANT

Consultant

ROLE

Under Mark's supervision, Ben will undertake interviews, document review and analysis, benchmarking and peer comparison, and preparation of deliverables.

PROFILE

Ben began consulting in 2019 after seven years of direct service to local governments on the East and West Coast. Most recently, Ben worked for the Budget and Management Services Department in the City of Durham, North Carolina. He worked on the annual budget and the community-wide strategic plan. He completed revenue projections for sales tax and water sales, assisted with financial planning for affordable housing, and led community engagement efforts designed to inform the City's budget process. Ben also started an innovation partnership program with local technology startup companies, which was awarded the J. Robert Havlick Award for Innovation in Local Government from the Alliance for Innovation.

As a consultant, Ben has been involved with organizational assessments for a broad range of departments – from emergency communications to human resources. He has analyzed staffing levels and organizational structure, created process maps, and developed actionable recommendations for improvement. Ben has also leveraged his experience to explore unique challenges for local governments. For example, he worked with the City of Fort Collins, Colorado, to conduct a cultural assessment of the Light and Power Utility, analyzing workplace climate and management practices.

Ben began his career in the Portland, Oregon region, where he served the Cities of Beaverton, West Linn, and Gresham, as well as Metro, the regional government for the Portland area. In those roles, he focused on community engagement, outreach, and communications initiatives. Ben expanded his experience in the Budget, Management, and Evaluation Department in Guilford County, North Carolina, where he analyzed government services such as jail operations and education funding. He also managed the County's social media and internal employee newsletter.

In addition to his work for local governments, Ben is a founding member of Engaging Local Government Leaders (ELGL). Since 2013, ELGL has grown from a few hundred members in Oregon to over 4,800 across the nation. He produces and co-hosts ELGL's GovLove Podcast, which discusses topics ranging from innovation and performance to equity and workforce development. He has led planning for the organization's annual conference and written articles for the website. He currently serves as the Chair of the ELGL Board of Directors.

Ben earned a master's degree in public administration from Portland State University and a bachelor's in politics and economics from Willamette University.



Specialties

- Budgeting and financial analysis
- Organizational assessment
- Strategic planning
- Innovation
- Staffing analysis

Professional History

- Raftelis/The Novak Consulting Group: Consultant (2019-present)
- City of Durham, North Carolina: Senior Budget and Management Analyst (2016-2019)
- Guilford County, North Carolina: Budget and Management Analyst (2014-2016)
- City of Gresham, Oregon: Intern (2014)
- Oregon Metro: Intern (2014)
- City of West Linn, Oregon: Intern (2013-2014)
- City of Beaverton, Oregon: Intern (2012-2013)

Education

- Master of Public Administration - Portland State University (2014)
- Bachelor of Arts in Politics and Economics - Willamette University (2012)

Professional Memberships

- Engaging Local Government Leaders (ELGL)
- North Carolina Local Government Budget Association (NCLGBA)

Kelsey Engelking

STAFF CONSULTANT

Associate Consultant

ROLE

Under Mark's supervision, Kelsey will undertake interviews, document review and analysis, benchmarking and peer comparison, and preparation of deliverables.

PROFILE

Kelsey has a background in physics, chemistry, and sustainability as well as experience providing residential energy efficiency consulting. She also has experience working with local governments and the public. Kelsey has two years of consulting experience and prior work experience in the sustainability and environmental sectors.

Kelsey has worked on strategic planning and organizational assessment projects across the country, particularly for utilities, including a review of the District of Columbia Department of Public Works, Charlotte Water for strategic planning, the City of Malibu for the development of a financial plan and model following a devastating fire in the community, an organizational assessment for the City of Tampa, Florida, Water Department, an organizational assessment of the Anchorage Water and Wastewater Utility (AWWU) and Solid Waste Services Department, and an organizational assessment of Pinellas County, Florida.



Specialties

- Project management
- Data analysis
- CRM (salesforce.com)

Professional History

- Raftelis: Associate Consultant (2019-present)
- CLEAResult: Associate Program Manager (2015-2019); Energy Advisor (2013-2015)

Education

- Bachelor of Arts in Physics, University of Colorado at Boulder
- Bachelor of Arts in Chemistry, University of Colorado at Boulder
- certifications
- Building Analyst Professional Certification, Building Performance Institute (BPI)
- Undergraduate Energy Certificate, Renewable & Sustainable Energy Institute

Certifications

- AWWA Risk & Resiliency Certification (2020)

Professional Memberships

- AWWA

Project Approach

The City of Lake Elmo is seeking a professional consultant to assist with a management review of the Planning and Building Department. The goal of this engagement is to identify opportunities for improved efficiency and effectiveness of operations, staffing, structure, technology, processes, and policies.

Our team has extensive experience working with local government clients, including many in Minnesota and surrounding states. Our focus is on providing solutions that work within the available resources and culture of the organizations we assist. The most innovative solutions in the world are valueless if they cannot be implemented or will not be accepted by the community. We pride ourselves on our ability to listen, analyze, and work with our clients to find not just a random selection of best practices taken from a manual but real solutions that can be implemented effectively. We are pleased that our prior engagements have resulted in corresponding actions by our clients to implement the recommendations that we have jointly developed.

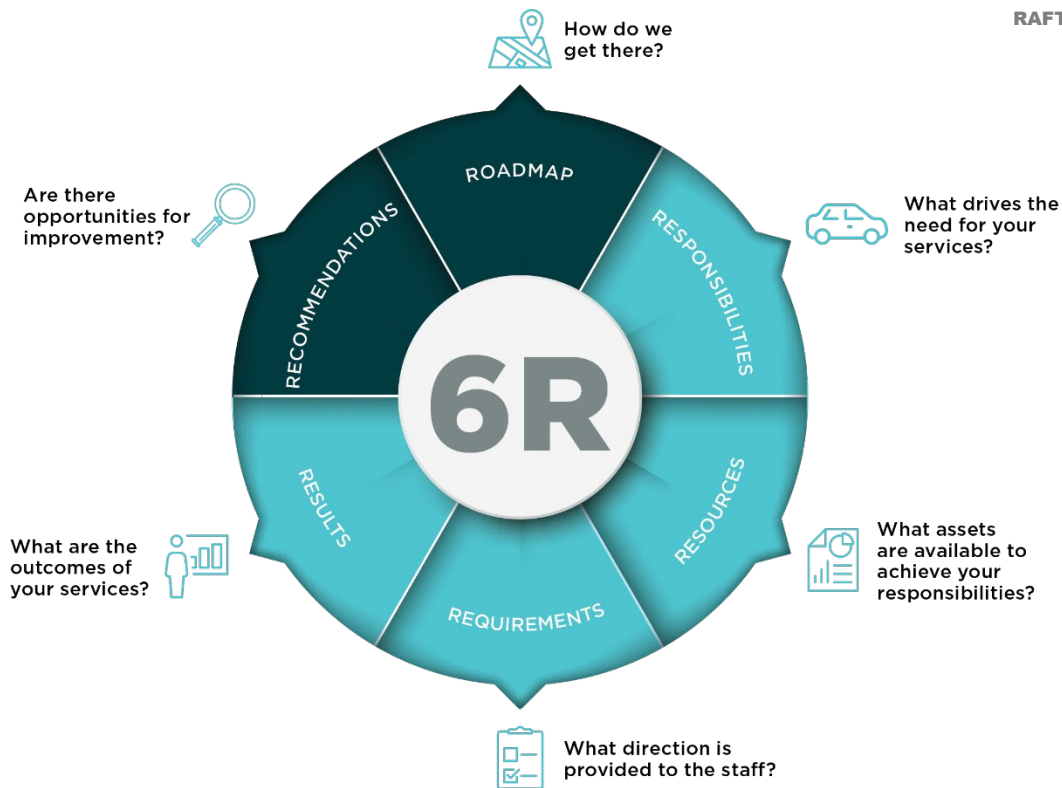
One of our strengths is the ability to build on existing capabilities and resources and to help organizations see things from a different perspective. We do this by listening to our clients and really understanding what they have to say. We do not operate with a pre-packaged set of recommendations, and we diligently work to avoid trying to fit our clients into a standard mold.

We recognize that there will always be competing interests between the levels of service and their costs. Defining “good enough” is a significant challenge that is aided by knowing that the work is both necessary and delivered as efficiently as possible. As resources diminish, we often find that organizations become increasingly reactive at a significant cost both to current and future operations. Maintaining planned, proactive approaches consistently generates a better, more cost-effective result, particularly when evaluated over time.

Every organization develops traditions, practices, and routines. To a certain extent, these provide stability and consistency. It is essential that these are subject to regular review and analysis to ensure that they continue to represent best practices that meet the needs of the community. Our staff has substantial experience in developing performance measurement systems so that communities and departments can track progress over time. We have helped our clients create benchmarks that establish a baseline for performance and objectives for the future.

We are excited about the opportunity to assist the City proactively plan and prepare for the future. We understand the importance of respecting the staff who are in place to serve the public. We assume good intent and will work with the City to collaboratively develop recommendations for improvement. Without this, implementation of recommendations and lasting improvements are not typically successful. We believe this intentional approach, coupled with our extensive expertise in all facets of public operations, makes us uniquely qualified to assist the City on this project within the timeframe requested.

To complete this work, our team will apply a project approach, focusing on these specific objectives using our “Six R” approach. This involves soliciting and collecting information on City **Responsibilities, Resources, Requirements, and Results** in order to identify possible organizational and operational **Revisions** with an associated **Roadmap** to implement positive change. This approach is depicted in the following graphic.



Responsibilities – What drives the need for your services? It might be the organization’s vision or mission, Federal, State, or local ordinance, or community service standards or expectations. We review these drivers to better understand service level constraints and opportunities for change.

Resources – What assets are available to achieve your responsibilities? These may include time, human resources, staffing, management capacity, financial position, contractual services, technology, and equipment and facilities. We assess the adequacy of these resources based on the service level expectations.

Requirements – What direction is provided to staff? The method by which staff approach service delivery is often guided by laws, codes, policies and procedures, or informal mechanisms like past practices or on-the-job training. These sources provided staff with direction on how they approach tasks and complete their work. We review these business processes to determine opportunities for improvement.

Results – What are the outcomes of your services? Our approach connects your responsibilities, resources, and requirements with the outcomes expected of your services. We assess measures of efficiency and effectiveness to assist in data-driven decision-making.

Recommendations – Are there opportunities for improvement? Based on our qualitative and quantitative analysis of your programs and services, we develop recommendations for improving organizational performance. These changes can range from high-level considerations (i.e., should we be in this business) to strategic issues (i.e., should we consider alternative service sources) to tactical issues (i.e., how can we improve the productivity, efficiency, and effectiveness of the activity or service).

Roadmap – How do we get there? We develop a plan that will guide the organization through the implementation of the recommendations for improvement. The Roadmap offers the recommended priority order of implementation, suggestions for phasing, and key milestones for success. The Roadmap also serves as a valuable tool for the organization as well as the community to promote accountability and communicate progress toward implementation.

Work Plan

THE FOLLOWING DETAILS OUR PROPOSED WORK PLAN FOR THIS PROJECT.

Activity 1: Begin and Manage Engagement

We will begin this engagement by holding a kick-off meeting with the City's project team to review the details and expectations of this effort and to finalize the project schedule. At the kick-off, we will discuss the City's interest in this study, the strengths and weaknesses of current planning, building, and code enforcement operations, and other issues that may be relevant to our work. We will review and finalize the project schedule. We will also meet with the Planning and Building Department staff to provide a high-level overview of our project approach, objectives, timeline, and expectations and to begin to engage them in the process.

We will prepare a request to Planning and Building for relevant background information. We will tailor the collection of data to the needs and issues identified, and we will work with the City to take information in the form it is available in order to minimize the time required of your already busy staff.

We typically collect the following data to better understand operations and staffing:

- Work volume relative to staff resources
- Customer service performance standards and compliance reports
- Budgets, including revenues and expenditures
- Fee schedules and previous fee studies
- Job descriptions and wage and compensation plans
- Organization charts and staffing tables, including changes over the preceding three to five years
- Process brochures or flowcharts
- Strategic organizational plans
- Relevant prior studies or reviews
- Management reports, including any applicable performance measurement and reporting
- Information technology infrastructure, including hardware and application inventories, use of field technologies, and system strategic plans

Throughout the project, we will provide the City with regular project status reports designed to maintain planned project progress and budget, to identify and resolve project issues, and to review project work products. In addition to formal status reporting, we anticipate numerous informal opportunities for the City to discuss various project and operating issues with our project manager and team leaders. We welcome the opportunity to have this informal dialogue since we believe that it will contribute to a more successful project.

Activity 2: Assess Operations

The project team will employ our Six R approach as introduced previously. The approach guides our efforts through data development, issue identification and analysis, and the creation of recommendations tailored to provide a thorough review of the City's Planning and Building functions.

Our project team will begin to understand current operations by holding confidential individual interviews with the Planning and Building Department Management and key designated staff members. The purpose of these interviews is to

solicit their insights regarding the City's current permitting and inspections processes, customer feedback, and expectations for this review.

In addition to operational performance and metrics, we will review the Department's organization structure, supervisory spans of control and responsibilities, and staffing levels in comparison to the benchmark peers, noting alternative structures and approaches. We will assess the City's staffing levels in the context of current and projected workload volumes, service level expectations, and best practices. We will determine the current and future workload drivers for the work.

Next, our project team will map out and flowchart the City's core planning and building processes in detail, including staff involved, timelines, and process steps, and compare them with industry best practices. We have found that the most effective way to develop a clear understanding of current processes is to involve all relevant staff in charting the work using process mapping. We have recently used this technique to map development review processes in many communities, including the cities of Charleston, South Carolina; Rockville, Maryland; Wilmington, North Carolina; and New Orleans, Louisiana. We will compare and contrast the City's permit application and submittal requirements, as well as review timelines, with those of comparable communities.

Our team will review with staff the use of current software for planning and building functions to identify strengths, weaknesses, and opportunities for improvement. We will discuss information technology available resources and potential needs with the Department and the City's internal Information Technology (IT) professionals, including the potential for digital permitting, plan review, and development review. As part of this IT assessment, our team will examine whether staff have been adequately trained in the software, whether the City is maximizing the use of available IT resources, including use of IT in the field, whether the level of IT support is sufficient, and whether operations can be streamlined or improved with additional IT implementation, training, or resources.

In collaboration with the City, our project team will identify a group of similar and high-performing planning and building operations in comparable municipalities to serve as benchmarking peers. As part of our analysis, we will evaluate the performance of the City's operations as it compares to these benchmark organizations, as well as to industry standards of performance and emerging trends in the field. We have developed industry best practices in many areas of local government service. This information was developed from our previous work with professional associations and industry groups, as well as other sources. We will also compare fee structure with peers. The resulting diagnostic provides a quick and objective overview of both the quantitative and qualitative work activities of permitting and inspection.

At the conclusion of our analysis, we will develop observations regarding the City's planning and building operation, staffing, information technology, peer benchmark operations and fees, and organizational structure, and our team will begin to identify areas for potential improvement. We will summarize what has been learned and review it with the City.

Activity 3: Conduct Stakeholder Analysis

The development review process is a regulatory process, and as such, meeting the interests of each customer while ensuring the safety, standards, and quality of the community can be very challenging. Maintaining and developing a built environment that responds to the vision for Lake Elmo requires rigor and discipline. At the same time, the City strives to meet its commitment to providing exemplary customer service. Therefore, it is important to evaluate the overall effectiveness of the community development functions to ensure they are meeting the City's needs.

To gauge customer perceptions, our project team will confidentially interview several key stakeholders/customers, including residents, developers, contractors, and others, to gain their perspectives on planning, building, and code

enforcement functions in the City. We will identify process glitches or bottlenecks. We will inquire about their perceptions of the City and the internal and external communication efforts that are occurring, as well as assess their effectiveness. We will ask how, in their view, the City's operations could be more friendly and helpful.

Activity 4: Develop Improvement Opportunities

At this point, our project team will have conducted interviews with City staff and customers/stakeholders, collected and analyzed data and fee information, and benchmarked your organization against high-performing peer operations to identify themes and opportunities for improvement in the City's planning and building operations, processes, information technology, communication and outreach, and fees.

These improvement opportunities will be ranked in order of importance and documented in a summarized issue identification format. This document will summarize our reasoning behind the identification of each issue and how it may impact planning and building functions, both for customers and for City.

We will review these preliminary recommendations with the City. Additional follow-up on issues or analysis will be conducted as needed. Based upon feedback received from the City, we will finalize the recommendations.

Activity 5: Prepare Project Report

In our final activity, the project team will prepare a comprehensive draft project report. The report will include an executive summary, methodology and approach for this project, and a thorough description and justification for all recommendations. The project team will review its observations and recommendations with the City, both to ensure factual accuracy as well as to test the viability of success for implementation. We will conduct any follow-up research that is required.

Based on feedback received, we will prepare and present the final report as directed by the City. The final report will include an implementation plan (or "Roadmap," as introduced earlier) to provide a prioritized list of report recommendations with implementation steps and benefits in order to support ongoing implementation efforts by the City.

References

Raftelis/TNCG has assisted over 300 local governments across the country with organizational assessments. In many instances, we have worked with organizations over multiple years and established long-term partnerships to build capacity and lasting improvements throughout an organization. We have become trusted advisors to these local governments, as outlined in the following references.

City of Cedar Rapids

IOWA

Reference:

Sandi Fowler, Deputy City Manager

P: 319.286.5077 / E: s.fowler@cedar-rapids.org

Kevin Ciabatti, Building Services Director

P: 319.286.5841 / E: k.ciabatti@cedar-rapids.org

The City of Cedar Rapids (City) retained TNCG, now part of Raftelis, in 2020 to conduct an organizational assessment of the City's Nuisance Services program. This program represents a collaborative effort with support from the City's Building Services Department and Solid Waste operations in the Utilities Department as well as the Secure and Friendly Environments in Cedar Rapids (SAFE-CR) program in the Police Department. The report reviewed the City's resources and operations supporting nuisance services in order to assess the effectiveness of its service delivery models, staffing level, processes, and procedures. Sixteen detailed recommendations covering policy and governance, structure and operations, and the application of technology were developed. Over time, these recommendations will enhance the City's ability to better understand the impact of nuisance services operations and how they advance the goals and initiatives outlined in the City's strategic plan, as well as provide a structure that will allow the City to meet community service expectations and adapt to future circumstances more consistently and effectively.

City of Santa Barbara

CALIFORNIA

Reference:

Paul Casey, City Administrator
E: pcasey@santabarbaraca.gov

James Hamilton, Community Development Business Manager
P: 805.564.5504 / E: jhamilton@santabarbaraca.gov

The City of Santa Barbara (City) retained TNCG, now a part of Raftelis, in 2020 to conduct an assessment of its development review process, from concept and design review to construction permitting and inspections. Ultimately, 31 recommendations were developed with significant employee and stakeholder engagement designed to make the process both more efficient and predictable for applicants and easier to understand for concerned residents and members of the public.

City of Charleston

SOUTH CAROLINA

Reference:

Susan Poteat, Director of Process and Service Improvement
P: 843.577.1381 / E: poteats@charleston-sc.gov

The City of Charleston (City) engaged TNCG (prior to merging with Raftelis) under a multi-year contract from 2017-present to conduct a series of organizational and structural assessments as part of the City's Innovation and Process Improvement initiative under the leadership of Mayor John Tecklenburg.

Charleston is a major year-round tourist destination and is experiencing unprecedented development and permitting activity. The firm engaged with the City staff and members of the development community to identify process improvement opportunities for the Technical Review Committee process, a key component of development review in the City. Our study of the City's development review process included interviews with internal and external stakeholders as well as a workshop with relevant City staff to develop detailed action plans designed to streamline the process.

Additionally, the firm conducted a detailed review of the City's capital construction process to ensure adequate funding and staffing to meet the demands of infrastructure maintenance and construction. A review of sanitation operations, processes, and staffing was also conducted.

City of Pearland

TEXAS

Reference:

Clay Pearson, City Manager

P: 281.652.1600 / E: cpearson@ci.pearland.tx.us

The City of Pearland (City) engaged TNCG, now a part of Raftelis, to conduct an assessment of the City's Community Development Department. Pearland is located in the Houston Metroplex and is currently one of the fastest-growing cities in the state. The assessment included a detailed staffing plan to address the City's increase in development-related workload.

Town of Nantucket

MASSACHUSETTS

Reference:

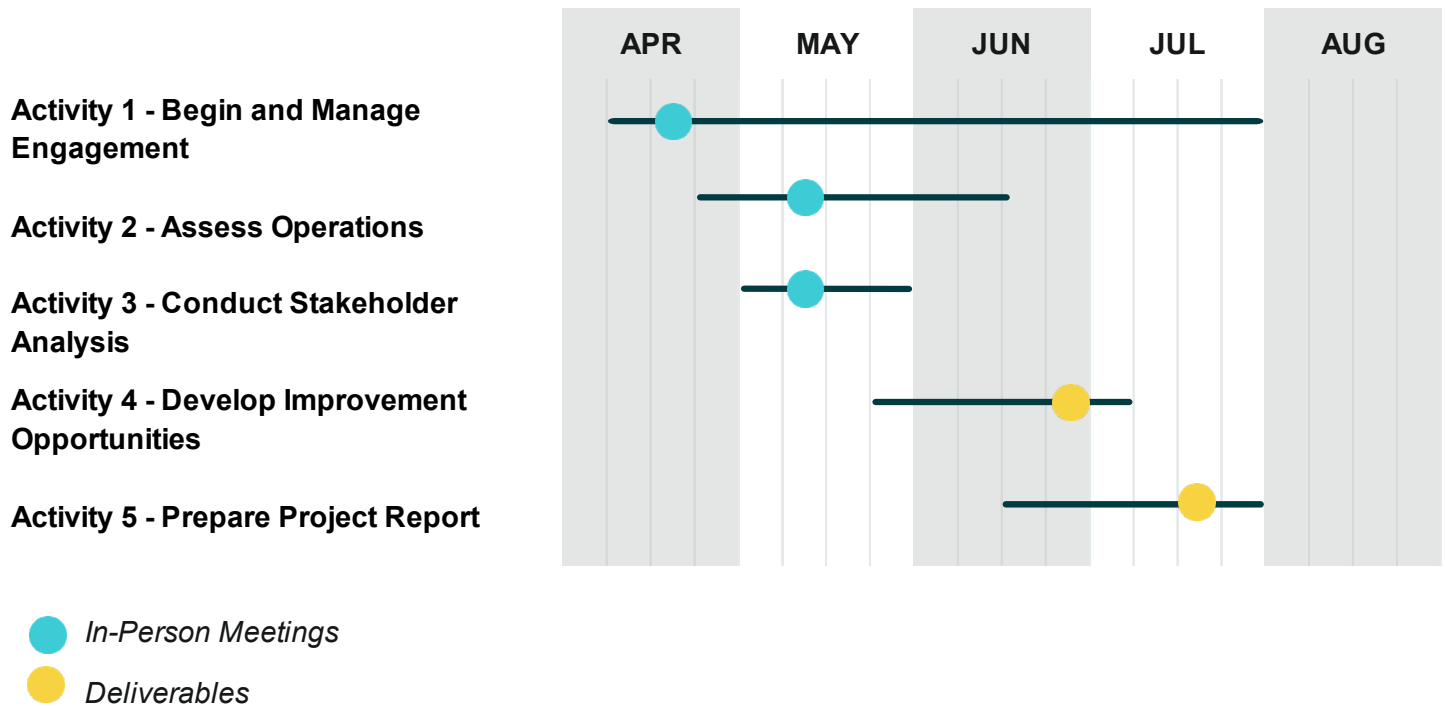
Libby Gibson, Town Manager

P: 508.228.7200 ext. 7305 / E: lgibson@nantucket-ma.gov

The Town of Nantucket (Town) contracted with TNCG (prior to joining Raftelis) for three separate projects. The first was a Town-wide Staffing Study; the second was a structural and operational review of the Town's Planning and Land Use Services function; and the third was the development of a Strategic Plan in collaboration with staff and the Select Board.

Schedule

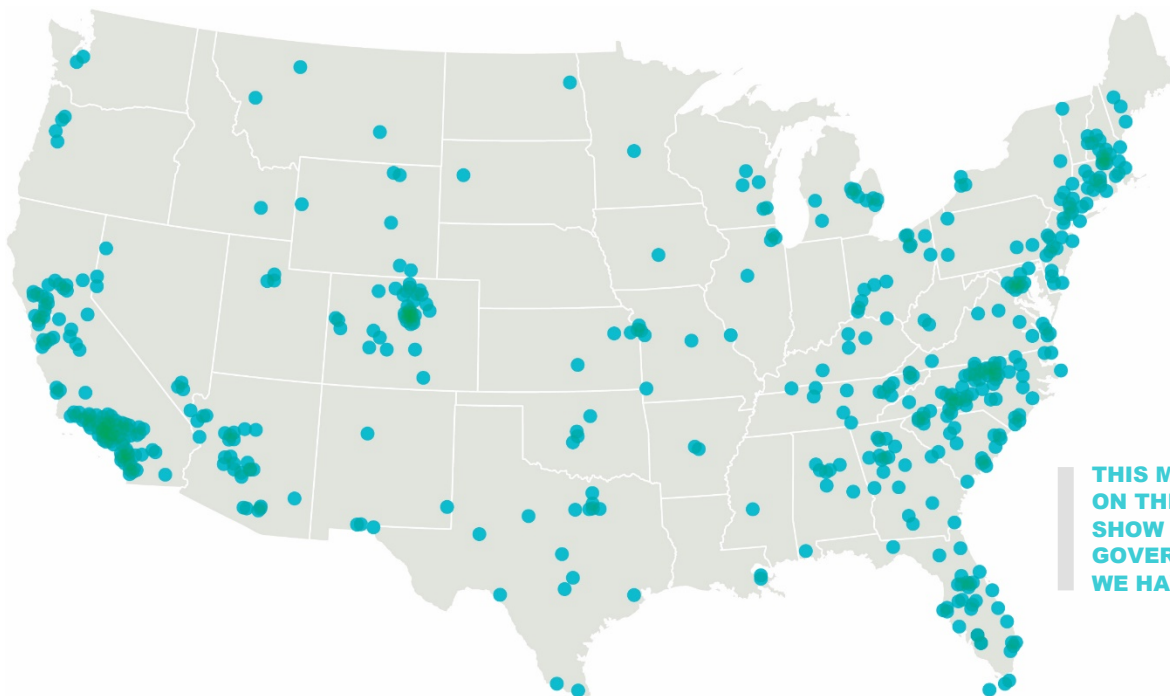
A proposed project schedule is included. We expect to refine this with the City of Lake Elmo during Activity 1.



Experience

RAFTELIS/TNCG HAS ONE OF THE MOST EXPERIENCED LOCAL GOVERNMENT FINANCIAL AND MANAGEMENT CONSULTING PRACTICES IN THE NATION.

Our staff has assisted more than 1,200 local government organizations across the U.S., including some of the largest and most complex agencies in the nation. In the past year alone, Raftelis/TNCG worked on more than 900 financial, management, and/or technology consulting projects for over 600 public-sector agencies in 44 states, the District of Columbia, and Canada.



THIS MAP AND THE MATRIX ON THE FOLLOWING PAGES SHOW SOME OF THE LOCAL GOVERNMENT CLIENTS THAT WE HAVE ASSISTED.

Raftelis/TNCG has provided financial/organizational/technology assistance to public agencies serving more than

25% of the U.S. population

National Experience

This matrix shows some of the communities throughout the U.S. that Raftelis/TNCG staff has assisted and the services performed for these clients.

Client		Organizational Assessment	Executive Search	Strategic Plan Facilitation
AL	Birmingham Water Works Board	<div></div>		<div></div>
AK	Municipality of Anchorage	<div></div>		
AR	Central Arkansas Water	<div></div>		<div></div>
AR	El Dorado	<div></div>		
AR	Little Rock Wastewater	<div></div>		
AZ	Alliance for Innovation			<div></div>
AZ	Avondale			<div></div>
AZ	Bullhead	<div></div>		
AZ	Central Arizona Project			<div></div>
AZ	Clarkdale		<div></div>	
AZ	Cottonwood		<div></div>	
AZ	Goodyear			<div></div>
AZ	Oro Valley		<div></div>	
AZ	Payson		<div></div>	
AZ	Peoria		<div></div>	
AZ	Scottsdale		<div></div>	
AZ	Sierra Vista			<div></div>
AZ	Yuma		<div></div>	<div></div>
CA	Central Contra Costa Sanitary District	<div></div>		
CA	Delta Diable Sanitation District	<div></div>		
CA	Fullerton	<div></div>		
CA	Gilroy	<div></div>		
CA	Hanford			<div></div>
CA	Hayward			<div></div>
CA	Hollister	<div></div>		
CA	Huntington Beach	<div></div>		
CA	Long Beach Transit Authority	<div></div>		
CA	Manhattan Beach			<div></div>
CA	Malibu	<div></div>		
CA	Oceanside Water Utilities			<div></div>
CA	Palo Alto			<div></div>
CA	Placer County			<div></div>
CA	Roseville			<div></div>
CA	Sacramento Area Sewer District/Sacramento Regional County Sanitation District			<div></div>
CA	San Gabriel	<div></div>		
CA	San Luis Obispo			<div></div>
CA	San Marino			<div></div>
CA	Santa Barbara	<div></div>		<div></div>

Client		Organizational Assessment	Executive Search	Strategic Plan Facilitation
CA	Seaside			<div></div>
CA	Yountville			<div></div>
CO	Adams County			<div></div>
CO	Aspen	<div></div>	<div></div>	<div></div>
CO	Aurora	<div></div>		<div></div>
CO	Boulder	<div></div>	<div></div>	<div></div>
CO	Boulder County	<div></div>		
CO	Brighton			<div></div>
CO	Centennial	<div></div>		<div></div>
CO	Denver Wastewater	<div></div>		
CO	Elbert County	<div></div>		
CO	Erie			<div></div>
CO	Evans			<div></div>
CO	Fort Collins	<div></div>	<div></div>	<div></div>
CO	Golden			<div></div>
CO	Greeley	<div></div>		
CO	La Plata County	<div></div>		
CO	Lafayette		<div></div>	<div></div>
CO	Louisville	<div></div>	<div></div>	<div></div>
CO	Loveland		<div></div>	
CO	Northglenn		<div></div>	
CO	Metro Water Reclamation District			<div></div>
CO	Routt County			<div></div>
CO	Thornton			<div></div>
CO	Timnath			<div></div>
CO	Westminster			<div></div>
CO	Windsor	<div></div>		<div></div>
CT	Connecticut Town & City Management Association	<div></div>		
CT	Enfield	<div></div>		
CT	Greenwich		<div></div>	
CT	Groton	<div></div>		
CT	Manchester	<div></div>		<div></div>
CT	Mansfield	<div></div>	<div></div>	
CT	Meriden		<div></div>	
CT	Windsor		<div></div>	
DC	DC Water			<div></div>
DC	District of Columbia Department of Public Works			<div></div>

Client		Organizational Assessment	Executive Search	Strategic Plan Facilitation
DC	International City/County Management Association	●		●
DC	National League of Cities	●		
DC	USAID - Moldova	●		
DE	Kent County		●	
DE	Lewes		●	
DE	Milford		●	
DE	Milton		●	
DE	Rehoboth Beach		●	
DE	Wilmington	●		●
DE	Wilmington Utilities	●		●
FL	Deerfield Beach			●
FL	Palmetto Bay			●
FL	Palmetto County	●		
FL	Pinellas County	●		
FL	Pompano Beach Utility Department	●		
FL	Sanford			●
FL	Tampa Water Department	●		●
FL	Winter Haven	●		
GA	Decatur			●
GA	Roswell			●
IA	Cedar Rapids	●	●	
IL	Carbondale	●		
IL	DuPage County	●		
IL	Evanston	●		
IL	Geneva			●
IL	Gurnee			●
IL	Lisle			●
IL	Peoria County		●	
IL	Schaumburg	●		
IL	Warrenville	●		
IL	Woodridge			●
IN	Bloomington	●	●	
IN	Indianapolis	●		
IN	Monroe County	●		
IN	Munster	●		●
KS	Baldwin City		●	●
KS	Bonner Springs	●		
KS	Edgerton		●	

Client		Organizational Assessment	Executive Search	Strategic Plan Facilitation
KS	Edwardsville			●
KS	Eudora			●
KS	Garden City	●		
KS	Gardner			●
KS	Johnson County		●	●
KS	Lawrence			●
KS	Merriam		●	
KS	Olathe			●
KS	Roeland Park			●
KS	Shawnee	●		●
KS	Tonganoxie		●	●
KS	United Government of Wyandotte County & Kansas City			●
KY	Lexington-Fayette Urban County Government	●		
KY	Louisville Water Company			●
KY	Paducah			●
KY	Sanitation District #1 of Northern Kentucky			●
LA	New Orleans	●		
LA	Orleans Parish School Board		●	
MA	Franklin County	●		
MA	Lexington			●
MA	Nantucket	●		●
MA	Pioneer Valley Planning Commission	●		
MA	Sherborn	●		
MA	Westborough	●		●
MD	Aberdeen	●	●	●
MD	Baltimore Department of Public Works	●		●
MD	Berwyn Heights		●	
MD	Cambridge		●	
MD	Charles County		●	
MD	College Park	●		●
MD	Gaithersburg		●	
MD	Garrett Park		●	
MD	Greenbelt			●
MD	La Plata		●	●
MD	Maryland Municipal League	●		
MD	Maryland State Judiciary			●
MD	Mount Rainier	●	●	
MD	New Carrollton		●	

Client		Organizational Assessment	Executive Search	Strategic Plan Facilitation
MD	Ocean City			●
MD	Ocean Pines Association		●	
MD	Riverdale Park		●	
MD	Rockville	●	●	●
MD	Sykesville		●	
MD	Takoma Park		●	
MD	University Park			●
MD	Westminster		●	●
MD	Worcester County			●
MI	Ada			●
MI	Ann Arbor		●	●
MI	Ann Arbor Transportation Authority			●
MI	Ferndale			●
MI	Holland	●		
MI	Jackson County			●
MI	Midland			●
MI	Midland Community Foundation			●
MI	Novi		●	
MI	Oakland County		●	
MI	Rochester Hills	●	●	
MI	Saline	●		
MI	Three Rivers	●		
MN	Cloquet	●		
MN	Edina	●		
MN	Minnesota Municipal League	●		
MN	Northfield	●		
MO	Chesterfield		●	
MO	Clayton		●	●
MO	Lee's Summit	●	●	●
MO	Maryville			●
MO	Metropolitan St. Louis Sewer District	●		
MO	Missouri Municipal League			●
MO	North Kansas City			●
MO	Parkville			●
MO	Platte City	●		
MO	Sikeston			●
MO	St. Joseph			●
MO	St. Louis County			●

Client		Organizational Assessment	Executive Search	Strategic Plan Facilitation
MO	University City			●
MT	Helena		●	
NC	Albemarle			●
NC	Asheville	●		
NC	Brevard			●
NC	Brunswick	●		
NC	Cary			●
NC	Charlotte Water			●
NC	GoTriangle Transit	●		●
NC	Greensboro	●		
NC	Lowell			●
NC	Onslow Water & Sewer Authority (ONWASA)			●
NC	Orange County	●		
NC	Raleigh	●		●
NC	Raleigh Public Utilities Department	●		
NC	Rolesville	●		
NC	Swansboro			●
NC	Wake County	●		
NC	Wilmington	●		
NC	Winston-Salem			●
NC	Winston-Salem/Forsyth County Utilities			●
NE	Hastings	●		
NE	La Vista	●		
NE	Reno	●		
NH	Keene		●	
NJ	Jersey Water Works	●		
NJ	New Jersey Health Initiative	●		
NM	Las Cruces		●	
NY	Batavia		●	
NY	Edgemont	●		
NY	Ithaca	●		
NY	Oneonta		●	
NY	Rochester	●		
NY	Wainscott	●		
OH	Beavercreek Township	●		
OH	Blendon Township			●
OH	Blue Ash	●		●
OH	Centerville		●	

Client		Organizational Assessment	Executive Search	Strategic Plan Facilitation
OH	Cincinnati	●		●
OH	Clearcreek Township	●		●
OH	Cleveland Heights	●	●	●
OH	Dayton	●	●	
OH	Delaware	●		
OH	Delaware County			●
OH	Delaware County EMS			●
OH	Dublin	●	●	●
OH	Gahanna	●		●
OH	Georgetown			●
OH	Granville		●	
OH	Greater Cincinnati Water Works			●
OH	Greene County	●		
OH	Hilliard		●	●
OH	Hudson		●	
OH	Jackson Township		●	
OH	Miami Township		●	
OH	Miami University	●		
OH	Miami Valley Risk Management Authority			●
OH	Montgomery County Environmental Services	●		●
OH	Monroe			●
OH	Moraine		●	
OH	National Association of State & Local Equity Funds			●
OH	Newark	●		
OH	Oberlin	●	●	●
OH	Ohio City/County Management Association	●		●
OH	Owens-Corning			●
OH	Piqua			●
OH	Portsmouth		●	
OH	Powell			●
OH	Prairie Township		●	
OH	Preservation Parks of Delaware County			●
OH	Sandusky		●	
OH	Sharonville			●
OH	Solid Waste Authority of Central Ohio (SWACO)	●	●	
OH	Solon	●		
OH	The Port, an Ohio Port Authority	●	●	●
OH	Toledo			●

Client		Organizational Assessment	Executive Search	Strategic Plan Facilitation
OH	Troy	●		
OH	Union County		●	
OH	Upper Arlington		●	●
OH	Washington Township	●	●	●
OH	West Chester Township		●	
OH	Westerville		●	
OH	Worthington	●	●	●
OH	Xenia	●		
OK	Lawton	●		
OK	Norman	●		
OR	Beaverton		●	
OR	Bend			●
OR	Gresham			●
OR	Hillsboro			●
OR	Hood River		●	
OR	Lane County		●	
OR	Newberg		●	
OR	Salem	●		●
OR	Washington County	●	●	
OR	Wilsonville	●		●
PA	Allentown	●		
PA	Association for Pennsylvania Municipal Management (APMM)			●
PA	Bethel Park	●		
PA	Breakneck Creek Regional Authority		●	
PA	Capital Region Water			●
PA	Carlisle Borough		●	
PA	Duquesne	●		
PA	East Buffalo	●		
PA	East Whiteland Township	●		
PA	Exeter Township	●		
PA	Farrell	●	●	
PA	Ford City Borough	●		
PA	Harrisburg	●		
PA	Hazleton	●		
PA	Lancaster County	●		
PA	Lewisburg	●		
PA	Nanticoke	●		
PA	Pittsburgh Water & Sewer Authority	●		●

Client		Organizational Assessment	Executive Search	Strategic Plan Facilitation
PA	Reading	●		
PA	St. Marys	●		
PA	State College			●
RI	Westerly	●		
SC	Charleston	●		
SC	Hilton Head			●
SC	Mount Pleasant Waterworks			●
SC	Renewable Water Resources (ReWa)	●		
TN	Farragut			●
TN	Johnson City	●		
TN	Metro Water Services of Nashville and Davidson County	●		●
TX	Abilene		●	
TX	Allen			●
TX	Austin	●		
TX	Brownsville Public utilities Board			●
TX	Cedar Hill			●
TX	Cedar Park	●		
TX	Dallas			●
TX	Lancaster		●	●
TX	League City			●
TX	North Texas Municipal Water Department			●
TX	Pearland	●		
TX	Plano			●
TX	Prosper			●
TX	Temple			●
TX	The Woodlands	●		●
TX	University Park		●	●
UT	Murray			●
UT	South Jordan			●
VT	Burlington Water Resources	●		
VT	Montpelier			●
VA	Albemarle County		●	●
VA	Alexandria		●	
VA	Appomattox River Water Authority	●		
VA	Arlington County		●	
VA	Ashland		●	
VA	Bedford County		●	

Client		Organizational Assessment	Executive Search	Strategic Plan Facilitation
VA	Charlottesville	●		
VA	Fairfax		●	
VA	Fairfax County		●	
VA	Fairfax County Water Authority			●
VA	Fredericksburg	●		
VA	Gloucester County	●		
VA	Hampton			●
VA	Harrisonburg		●	
VA	Leesburg		●	
VA	Loudoun County	●	●	
VA	Newport News Waterworks			●
VA	Purcellville	●		
VA	Rivanna Water & Sewer Authority			●
VA	Suffolk	●		
VA	Vienna			●
VA	Virginia Retirement System		●	
VA	Warrenton	●	●	
VA	Washington County Service Authority			●
WA	Bellevue	●		●
WA	Camas	●	●	
WA	Mercer Island			●
WA	Richland			●
WA	Sammamish		●	
WA	Sequim	●		●
WA	Shoreline	●	●	
WI	Eau Claire			●
WI	Central Brown County Water Authority		●	
WI	Green Bay/Central Brown County	●		
WI	Mequon		●	
WI	Milwaukee Metropolitan Sewerage District			●
WI	Oak Creek			●
WI	Shorewood	●		
WI	Washington County			●
WV	Monongalia County			●
WV	Morgantown		●	●
PR	Puerto Rico Aqueduct & Sewer Authority (PRASA)	●		

Fee

The total not-to-exceed cost for completion of the scope of work is \$49,500. This includes all professional fees and expenses. The City will be invoiced monthly as tasks are completed.

Activity	Description	Cost
1	Begin and manage engagement	\$7,150
2	Assess operations	\$14,825
3	Conduct stakeholder analysis	\$7,450
4	Develop improvement opportunities	\$6,950
5	Prepare project report	\$13,125
TOTAL		\$49,500

The following is a list of hourly rates by staff classification.

Project Team Member	Hourly Rate
Vice President	\$310
Senior Manager	\$275
Senior Consultant	\$215
Consultant	\$185
Associate	\$155