



City of Belle Isle

Staffing Model Analysis

COPY / RFP 2023-06 / MAY 4, 2023



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The Raftelis Charitable Gift Fund allocates profits, encourages employee contributions, and recognizes time to charitable organizations that support:

- Access to clean water and conservation
- Affordability
- Science, technology, and leadership

Raftelis is investing in improved telecommunication technologies to reduce the firm's number one source of carbon emissions—travel.



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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LETTER OF SUBMISSION

May 4, 2023

Ms. Yolanda Quiceno
City Clerk
City of Belle Isle
1600 Nela Avenue
Belle Isle, FL 32809

Subject: Proposal for Staffing Model Analysis (RFP 2023-06)

Dear Ms. Quiceno:

We are pleased to submit this proposal to provide a staffing model analysis for the City of Belle Isle (City). Our focus has always been to help local government clients solve their financial, organizational, and technology challenges. 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 and staffing analyses.

Raftelis was established in 1993 to provide financial and management consulting services of the highest quality to local governments and utilities. 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:

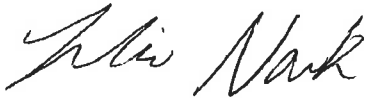
- **A workable and insightful approach:** Our team's approach specifically addresses the City's needs and will help develop a best practice-level plan to align staffing and organizational structure of the City with the vision and mission of the Belle Isle community. The City's desire for gained organizational/operational efficiencies and effectiveness is the exact type of consulting work our firm performs.
- **An experienced team who knows 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. We carry insurance appropriate for a firm conducting staffing studies. This proposal will be honored for 90 days.

If you have any questions, please do not hesitate to contact our Organizational Assessment Practice Lead using the following contact information. She is authorized to represent the firm.

Michelle Ferguson, Vice President – Organizational Assessment
341 North Maitland Avenue, Suite 300, Maitland, FL 32751
Phone: 828.777.6588 / Email: mferguson@raftelis.com

Sincerely,

A handwritten signature in black ink, appearing to read "Julia Novak". The signature is fluid and cursive, with the first name "Julia" and last name "Novak" clearly distinguishable.

Julia Novak
Executive Vice President

BACKGROUND INFORMATION

Who We Are

RAFTELIS AND THE NOVAK CONSULTING GROUP, HELPING LOCAL GOVERNMENTS AND UTILITIES THRIVE

Local government and utility leaders partner with Raftelis to transform their organizations by enhancing performance, planning for the future, identifying top talent, improving their financial condition, and telling their story. We've helped more than 600 organizations in the last year alone. We provide trusted advice, and our experts include former municipal and utility leaders with decades of hands-on experience running successful organizations. People who lead local governments and utilities are innovators—constantly seeking ways to provide better service to the communities that rely on them. Raftelis provides management consulting expertise and insights that help bring about the change that our clients seek.

TNCG is Now Raftelis

The Novak Consulting Group and Raftelis have always shared a focus on delivering lasting solutions for local government agencies. In January 2020, TNCG 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 140 of the country's leading local government and utility consultants, who have decades of 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.

We believe that Raftelis is the *right fit* for this project. We provide several key factors that will benefit the City and help to make this project a success.

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 more than 140 consultants, Raftelis has one of the largest local government management and financial consulting practices in the nation. Our depth of resources will allow us to provide the City 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.

30 years
serving local
governments
and utilities

How we stack up

OUR TEAM INCLUDES

140+ consultants focused on
finance/management/communication/
technology for local governments and utilities

RAFTELIS HAS PROVIDED ASSISTANCE FOR

1,500+ local governments
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

1,000+ projects for **600+** agencies in **46** states

Experience

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

Our staff has assisted more than 1,500 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 worked on more than 1,000 financial, management, and/or technology consulting projects for over 600 public-sector agencies in 46 states, the District of Columbia, and Canada. Raftelis has assisted hundreds of local governments across the country. 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.



RAFTELIS HAS PROVIDED FINANCIAL/
ORGANIZATIONAL/TECHNOLOGY ASSISTANCE
TO PUBLIC AGENCIES SERVING MORE THAN
25% OF THE U.S. POPULATION.

Town of Nantucket MA

Reference: Libby Gibson, Town Manager

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

The Town of Nantucket (Town) is a small island community located approximately 30 miles southeast of Cape Cod, Massachusetts. The Town has a year-round population of approximately 14,491 residents which swells to over 50,000 during the summer tourism months.

The Town contracted with the firm in 2018 for three separate projects. The first was a Town-wide Staffing Study; the second was a structural review of the Town's Planning and Land Use Services function; the third was the development of a Strategic Plan in 2018. For this engagement, we worked in collaboration with staff and the Select Board to prepare the Town's first Strategic Plan. This included input from the organization, as well as assistance with the implementation of the Town's key focus areas. Since the original engagement, Raftelis has supported the Town on a number of initiatives, including facilitating the Town's facilities master plan; monitoring and reporting on implementation of the strategic plan; hosting community listening sessions on emerging issues, including the

Town's pandemic and PFAS response; and the creation of a Town Sustainability Office. We have since provided executive recruitment, succession planning, and facilitation services.

City of Charleston sc

Reference: Susan Poteat, Director of Process and Service Improvement

P: 843.577.1381 / E: poteats@charleston-sc.gov

Since 2017, our team has had the privilege of working alongside the City of Charleston (City) to strengthen the organization's ability to provide high-quality services to the community. Charleston engaged the firm under a multi-year contract 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. Mayor Tecklenburg became the Chief Executive Officer in 2016 following a Mayor who had served for 40 years. Mayor Tecklenburg has a different style than his predecessor and was eager to build an organizational culture of Resilience, Innovation, Sustainability, and Excellence.

We have worked together to slowly evolve the system of management and improve efficiency in Charleston. Together with the Department Directors, Process Improvement Team, and the Process and Service Improvement Division, key functions and processes throughout the organization have been assessed, and opportunities to enhance service delivery and improve efficiency were identified and implemented. The work has included introducing staff to best practices in innovation, conducting numerous management studies, and serving as a trusted advisor to the Mayor on the organization of his office and management system development.



Projects for the City have largely focused on organizational assessment and improvement, best practices evaluation, benchmarking, and development of future state recommendations to ensure effective and efficient progress toward organizational objectives and excellence in customer service. The Raftelis team has led staff interviews and process improvement exercises, reviewed and recalculated technical review committee submittal fees, and developed clear, actionable, and implementable recommendations for the City of Charleston.

Charleston is a major year-round tourist destination and is experiencing unprecedented development and permitting activity. 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. Additionally, the firm conducted a review of sanitation operations, processes, and staffing. 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.

Implementation support was provided where requested. This process continues to provide ongoing support and accountability as the organization moves through the implementation of recommendations. Implementation of key improvement strategies has occurred at many levels throughout the City, allowing the organization to make tremendous progress in instilling a culture of continuous improvement.

Key projects completed to date have included the following:

- Technical Review Committee Process Assessment
- Workforce Profile & Employee Survey
- Environmental Services & Fleet Assessment
- Special Events Process Review
- IT Governance
- Public Services Organization Structure Assessment
- Parks Department Staffing Study
- Purchasing Review
- Payroll Process Assessment
- Construction Permitting Performance Assessment
- Minutes Benchmarking Research
- Housing Substantial Rehabilitation Process Improvement
- Workforce Profile & Employee Survey – Assessment of Progress Since Prior Review
- Affordable Housing Best Practices
- Fire Marshal Division Assessment

In addition, Raftelis is proud to have developed BRIDGE Academy for the City. BRIDGE Academy is a four-day on-site process improvement and innovation training and development program created for the City of Charleston, SC. The program provides cohort-based for City staff on process improvement and innovation tools and concepts, developed through an equity lens. BRIDGE Academy is aimed at increasing organizational capacity and developing a citywide environment that fosters innovation and creative and equitable problem-solving.

Pinellas County FL

Reference: Joe Lauro CPPB/CPPO, Director, Department of Administrative Services

P: 727.464.4710 / E: jlauro@pinellascounty.org

Since 2014, Pinellas County (County) has hired the firm to conduct several operational assessments and to assist with improving efficiency and effectiveness. The firm has worked on several projects to conduct process and financial analyses on various departments and divisions.

In 2021, the County engaged the firm to complete an organizational assessment of the County's Fleet Maintenance Division operations and practices. This assessment was informed by customer and staff interviews, and an analysis of extensive data provided by the County, as well as a review of industry best practices and peer organizations. In addition to a review of the Division's fleet operations, an implementation plan for a green fleet initiative was researched and developed. The plan outlines both short- and long-term investments the County can make to integrate alternative fuel vehicles into the County's fleet. In addition,



a fuel site assessment was conducted and investments for an effective but cost-efficient fuel program are outlined in the report.

In 2020, Pinellas County Utilities (PCU) engaged Raftelis for a review of PCU business processes, particularly as related to engineering, customer service, maintenance, and water quality. The work was designed to build upon lessons learned during a water policy manual update project that Raftelis completed for PCU. Raftelis engaged division staff and other relevant stakeholders in a series of topical workshops to inventory and document existing services related to key work processes, such as new service installation (from permit to activation), implausible meter reads, and the meter-to-cash process. Raftelis identified opportunities to optimize processes, which could include a reduction in the number of steps to complete a given task, opportunities to reduce the cost of an activity, or opportunities to adjust the level of service being provided and to determine appropriate staffing levels. Raftelis reviewed its recommendations with the PCU project manager and relevant staff, which implemented several recommendations to enhance operations.

In 2021, Pinellas County again engaged Raftelis to conduct a service level and staffing assessment of the Parks and Conservation Resources Department (PCRD). The goal of this assessment was to identify the current service level for park maintenance, customer service/enforcement, and operations; compare services with best practices guidelines; and define the staffing and resources required to meet service level goals. The project team completed management and staff interviews, focus groups, and site visits. A wide variety of data was analyzed to define, for each park and each park asset, the labor hours required to complete ongoing and recurring tasks and special projects. This was compared to the labor hours required to achieve existing service levels and account for employee leave and vacancies. Service levels were then compared against best practices guidelines from industry organizations, such as the National Recreation and Park Association (NRPA), and similar benchmark organizations. The focus of this best practices research was to utilize service level goals, rather than population size or form of government, as the most important comparative factor. This approach enabled the project team to clearly define the staffing levels required to meet best practices service levels and to clarify the most effective approach for the staffing gap.

City of Bloomington IN

Reference: Emily Fields, Assistant Human Resources Director

P: 812-349-3404 / E: piersone@bloomington.in.gov

The City of Bloomington (City) began a systematic process of assessing each City department, under the leadership with Mayor John Hamilton. The City engaged our project team to lead these efforts. To date, detailed assessments have been completed for the following departments: Finance/Controller; Public Works; Utilities; Transportation and Planning; Legal; Human Resources; Information Technology; and the Police and Fire Departments. Assessments were also completed for the Housing and Neighborhood Development Department; Economic and Sustainable Development Department; and the Office of the Mayor. In addition, a review of the City's various Boards and Commissions was conducted.

Town of Westborough MA

Reference: Kristi Williams, Town Manager

P: 508.366.3032 / E: kwilliams@town.westborough.ma.us

The Town of Westborough (Town) engaged the firm to conduct a Town-wide staffing study. This assessment included a comprehensive review of consolidation opportunities of the Town's numerous departments to ensure

greater efficiency, as well as enhanced service to the community during a time of limited financial resources. Interviews were conducted with Town staff, and surveys were administered to the community and businesses to solicit input on service level expectations. The Town is currently in the process of implementing recommendations from the study as part of its 2021 budget process.

Brunswick County Public Utilities NC

Reference: John Nichols, Director, Brunswick County Public Utilities

P: 910.253.2653 / E: john.nichols@brunswickcountync.gov

The Brunswick County Public Utilities Department (Department) engaged Raftelis to assess the organizational structure, services provided, and staffing needs of the water and wastewater utilities. This work included evaluating organizational and operational processes and comparing Brunswick County to peer organizations. Raftelis interviewed staff within the Department, toured facilities, reviewed best practices, and collected data from six benchmark organizations. Recommendations were made to improve the effectiveness of the utilities through structure changes, additional capacity, as well as enhancements to performance management, work planning, and communication within the Department.

Guilford County NC

Reference: Jason Jones, Deputy County Manager

P: 336.641.3383 / E: jjones6@guilfordcountync.gov

In late 2021, Guilford County (County) engaged Raftelis for an organizational assessment of its Human Resources Department (Department). The purpose of this assessment was to conduct an evaluation to improve the effectiveness of operations, staffing, technology, processes, and policies to support the HR Department's transition to be proactive and innovative and to meet current and future workforce demands. Our team interviewed Department staff, met with stakeholders and internal customers, reviewed a variety of data and information, researched industry best practices, and compared the County's HR operations with those in Durham, Forsyth, Mecklenburg, Orange, and Wake counties. Recommendations included staffing and structural changes, training and development improvements, and technology implementation.

PROJECT APPROACH

Project Plan

The City of Belle Isle is seeking a professional consultant to provide an assessment of appropriate staffing levels in City departments. The goal of this engagement is to ensure the ability of the City to meet operational requirements and to utilize staff resources most effectively.

Our team has extensive experience working with local government clients, including many in Florida 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.

THE FOLLOWING DETAILS THE PROPOSED WORK PLAN.

Activity 1: Understand Background and Context

We will begin this engagement by meeting remotely with the City Manager and other key staff to understand the internal operational context, external stakeholder and community pressures, as well as current organizational strengths and challenges associated with the City's service demands and approaches.

Next, our team will meet in person with the directors and managers in Finance, Administration and Planning; the Police Department; the Public Works Department; and General Government to understand their service perspectives. As necessary and available, we will request and review relevant background information, such as job descriptions, organizational charts, previous studies, departmental work plans, and other similar data to inform our work. This initial step will support our learning and understanding of your approach, service demands, resource constraints, and performance results.



We will meet with staff in the planning function to understand past, current, and projected changes to population and demographics of the community, as well as anticipated development growth (residential and commercial) and its impact on the City. We will also meet with the staff supporting financial management to understand existing financial management, as well as planning and forecasting efforts through internal financial forecast models. We will also finalize the project operational plan and schedule to ensure shared understanding of relative roles and responsibilities, and support project relationships and outcomes.

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

Activity 2: Document Existing Operations and Service Levels

We will begin Activity 2 by assessing the organizational approach and structure of each department and identified function to determine its impacts on program operations now and in the future. We will look at both the organizational alignment of divisions and work units, as well as how they integrate with the overall structure of the departments and impact service provision. We will conduct the assessment from the following aspects of organizational design:

- The number of organizational levels and reporting procedures and the impacts on the size and composition of the organization's management structure
- Alignment of leadership, management, and supervision
- The relative importance of specific operations in regard to organizational placement
- Adequacy of communication and coordination between and among operating units
- Spans of control and management supervision
- Overlapping or duplicated functions
- Clear lines of authority and responsibility
- Sufficiency of supervisory ratios
- Distinct work units to carry out important functions

We will meet with key staff in each department and identified functions to define their existing programs and services. Using information developed in Activity 1 and Activity 2, we will develop an inventory of services and current service levels across the organization. This will include a review of the dynamics that drive workload, the volume of work performed, who performs it, and trends that will impact workload and service levels into the future. Specific areas of inquiry include:

- Review job descriptions to be thoroughly familiar with all positions, including managers and supervisors; propose any recommendations for workflow and assignment efficiencies and deficiencies.
- Assess staffing needs and optimize staffing levels based on current job operations. Identify any redundancies and opportunities for workflow efficiency, staffing and classification options, and other options.
- Assess the City's organizational mission, vision, goals, and objectives, including performance-based outcome measures.
- Review staffing and overtime history within the departments provided by the City.
- Analyze processes and structures supporting the major department functions.
- Review workload levels by department and classification for the City.
- Assess the organizational effectiveness and operational performance levels of each department.
- Identify any other possible organizational and operational process improvements.
- Assess the gap between needs/standards and current performance.

This information will be developed in detail and summarized in the format of a core services matrix documenting existing service levels, as well as identifying potential service overlaps or gaps.

We will identify potential organizational options and associated operational changes that support efficiency and effectiveness of the functions. We will meet virtually with department leadership to review the core service matrix and validate our understanding, as well as provide an opportunity for additional feedback and adjustment.

Activity 3: Develop Staffing Model

We will build on the information developed earlier to support development of a staffing model for the organization and its departments. We will review applicable major business functions and programs and consider existing and alternative service provision methods. Factors that may impact staffing may include in-house versus external contracting, succession planning, retention and recruitment practices, reporting relationships, span of control, regulatory constraints, staff training, and work culture. We will review operations in relation to appropriate management practices and the use of technology.

Our team will evaluate and compare desired levels of service with staffing levels and identify areas in which the City can streamline processes to maximize resource efficiency as well as where it may consider alternative resources to achieve stated levels of service and address anticipated future workload.

Based on the data review and interview themes, our team will evaluate the City's organizational structure and staffing in all departments, including an understanding of programs and services, workgroup functions, and workload drivers. We will conduct follow-up virtual meetings with departments as necessary. Based upon this analysis, we will prepare our assessment of recommended current staffing levels that identifies positions and staffing levels required to accomplish current work. We will test assumptions in the model and document the model structure and use.

Activity 4: Develop Departmental Business Plans with Staffing Projections

We will build on the current staffing plans developed in Activity 3 and expand to develop individual department business plans. These business plan templates can be used by the City in the future to assess impacts from changing conditions. The business plans will include an assessment of current staffing levels as compared to anticipated future service demands.

Our team will also analyze whether and how each department can leverage external workforce options such as temporary or seasonal staff, contracted staff or companies, volunteers, and more. We will review the plan for capital equipment purchases to support department operations and recommend potential improvements.

We will review the deliverables with City leadership for their understanding, suggested changes, and concurrence. We will finalize the individual department business plans in memo format to accompany the business planning template as the final deliverable for the engagement.

PROJECT TEAM

Project Team

WE HAVE DEVELOPED A TEAM OF CONSULTANTS WHO SPECIALIZE IN THE SPECIFIC ELEMENTS THAT WILL BE CRITICAL TO THE SUCCESS OF THE CITY'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 be responsible for overall project accountability and will be available to provide quality assurance and control, industry perspective, and insights into the project.

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: Vice President (2021-present), Senior Manager (2020-2021); Organizational Assessment Practice Leader, The Novak Consulting Group (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 manage the day-to-day aspects of the project ensuring it is within budget, on schedule, and effectively meets the City's objectives. He will also lead the consulting staff in conducting analyses and preparing deliverables for the project. Mark will serve as the City's main point of contact for the project.

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.

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.



Specialties

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

Professional History

- Raftelis: 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

Claire Pritchard

STAFF CONSULTANT

Senior Consultant

ROLE

Claire will work at the direction of Mark in conducting interviews, directing research and analysis, preparing recommendations, and drafting deliverables.

PROFILE

Claire began her consulting career following five years of service with Dakota County, Minnesota, where most recently she held the position of assistant to the county manager. While with Dakota County, Claire coordinated the County's legislative agenda, assisted in the development of the annual budget, and conducted financial impact analyses and process improvement efforts for a variety of County functions. Claire also coordinated the County's transition to a new form of government in 2013.

As a consultant, Claire has worked on organizational and staffing analyses for communities around the country, such as the Town of Nantucket, Massachusetts, the City of Allentown, Pennsylvania, and the City of Bloomington, Indiana, as well as several utilities, including Fairfax Water, Virginia, Pinellas County Utilities, Florida, the San Diego Public Utilities Department, California, and Tampa Bay Water, Florida.

Claire has assisted in developing financial models to analyze revenue and expenditure trends, as well as conducted detailed staffing and workload analysis to determine optimal organizational structures. She has developed and analyzed an array of employee and community-based surveys. Claire has conducted several best practice and benchmarking research projects and has assisted in the creation of strategic planning and implementation deliverables.

As a student at the University of Chicago, Claire served as a policy intern with the National Association of Regional Councils, where she developed an educational program on the work of regional councils. She was also the associate editor for international development for the Chicago Policy Review.

Claire earned a bachelor's degree in political science from the University of Chicago and a master's degree in public policy from the University of Chicago Harris School of Public Policy. She is a member of the International City/County Management Association and is a former ICMA Local Government Management Fellow.



Specialties

- Organizational assessment
- Staffing analysis
- Survey and data analysis
- Best practice and benchmarking research

Professional History

- Raftelis: Senior Consultant (2023-present); Consultant (2021-2022); Associate Consultant (2020-2021); Associate Consultant, The Novak Consulting Group (2018-2020)
- Dakota County, Minnesota: Assistant to the County Manager (2013-2017)
- National Association of Regional Councils: Policy Intern (2012)
- Congressional Research Service (2010-2011)

Education

- Master of Public Policy - University of Chicago (2013)
- Bachelor of Arts in Political Science - University of Chicago (2009)

Professional Memberships

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

Myra Ray-Howett

STAFF CONSULTANT

Associate Consultant

ROLE

Myra will work at the direction of Mark in conducting interviews, directing research and analysis, preparing recommendations, and drafting deliverables.

PROFILE

Myra holds public sector experience in best practice research, policy analysis, and grant management at both the state and local level. Prior to the start of her consulting career, Myra worked as a management analyst for the City of Cambridge, Maryland. In her role, Myra worked directly with the City Manager to provide the City Council with well-informed reports and policy recommendations on topics such as municipal marina and utility rate increases. She also managed the review and award process for the City's American Rescue Plan Act (ARPA) non-profit grant program of approximately \$870,000.

Before her role with the City of Cambridge, Myra worked with the Anne Arundel County Partnership for Children, Youth and Families where she assisted in researching and writing the 2021 Community Health Needs Assessment, helped to facilitate community engagement meetings, and created a grant management and tracking system for the organization. In addition to her experience with city and county government, Myra has worked for the Delaware General Assembly as a legislative fellow by staffing the House Administration Committee and writing policy memorandums for lawmakers on issues such as voting rights, housing affordability, and education. Further, she spent a year and a half as a research fellow with the University of Delaware's Institute for Public Administration, where she conducted over forty program evaluations for senior centers to help the Delaware General Assembly determine each center's eligibility for Grant-In-Aid funding.

Myra also has experience in communications and environmental policy. She previously interned with the Alliance for the Chesapeake Bay, spending months writing articles to inform the public on issues impacting the health of the Chesapeake Bay watershed, our nation's largest estuary. She also conducted various case studies on funding sources for municipal green infrastructure projects.

Myra earned a bachelor's degree in anthropology from St. Mary's College of Maryland and a master's degree in public administration from the University of Delaware. She also served as co-president for the University of Delaware's ICMA student chapter.



Specialties

- Best practice research
- Grant management
- Program evaluation

Professional History

- Raftelis: Consultant (2022-present)
- City of Cambridge, Maryland: Management Analyst (2022)
- Anne Arundel County Partnership for Children, Youth and Families: Executive Administrative Coordinator (2021-2022)
- Delaware General Assembly: Legislative Fellow (2021)
- Alliance for the Chesapeake Bay: Communications Intern (2020)
- Biden Institute for Public Administration: Research Fellow (2019-2021)
- Willow Construction: Contract Administrator (2017-2019)

Education

- Master of Public Administration - University of Delaware (2021)
- Bachelor of Arts in Anthropology – St. Mary's College of Maryland (2017)

Professional Memberships

- International City/County Management Association (ICMA)

COST

Cost

The total fixed fee for completion of the proposed scope of work is \$49,950. This includes all professional fees and expenses. Of this amount, \$45,465 is for professional consulting services, and \$4,485 is for expenses, including travel, lodging, and other incidentals.

A breakdown of consulting hours and costs by project activity is provided in the table below.

Activity	Description	Estimated Hours	Cost
1	Understand Background and Context	29	\$7,475
2	Document Existing Operations and Service Levels	56	\$15,275
3	Develop Staffing Model	46	\$10,475
4	Develop Departmental Business Plans with Staffing Projections	68	\$16,725
TOTAL		199	\$49,950

The City will be invoiced monthly as tasks are completed.

At the start of this engagement, we will work with the City to identify specific resources needed for this work. Typical requirements of City staff are outlined in the table below.

City Role	Description
Point Person	A primary point person with the City to assist us with scheduling interviews, meeting locations, and other logistics.
Project Team Members	A minimum of three meetings can be expected with the City's Project Team to review project status and/or deliverables.
Data Provision	At the start of the engagement, we will request a variety of background materials to inform our work. The majority of this information will be data that is readily available.
Interviewees	Generally, interviews are approximately 60 minutes each. Some direct follow-up with staff may be needed, based on the findings of our work.

TIMELINE

Timeline

A proposed project schedule is provided below with a breakdown by project activity. We expect to further refine this with the City during Activity 1.



APPENDIX A: ADDITIONAL EXPERIENCE

Appendix A: Additional Experience



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	Client	Organizational Assessment	Executive Search	Strategic Plan Facilitation
AL Birmingham Water Works Board	●		●	CA Los Angeles	●		
AK Municipality of Anchorage	●			CA Long Beach Transit Authority	●		
AR Central Arkansas Water	●		●	CA Manhattan Beach			●
AR El Dorado	●			CA Malibu	●		
AR Little Rock Wastewater	●			CA Montecito Water District	●		
AZ Alliance for Innovation			●	CA Monte Vista Water District	●		
AZ Avondale			●	CA Moorpark			●
AZ Bullhead	●			CA Oceanside	●		
AZ Central Arizona Project		●	●	CA Oceanside Water Utilities			●
AZ Clarkdale		●		CA Palo Alto			●
AZ Cottonwood		●		CA Placer County			●
AZ Goodyear			●	CA Rincon del Diablo	●		
AZ Oro Valley		●		CA Roseville			●
AZ Payson		●		CA Sacramento Area Sewer District/Sacramento Regional County Sanitation District			●
AZ Peoria		●		CA Sacramento Suburban Water District	●		
AZ Scottsdale		●		CA San Gabriel	●		
AZ Sierra Vista			●	CA San Luis Obispo			●
AZ Yuma		●	●	CA San Marino			●
CA California City	●			CA Santa Ana Watershed Project Authority	●		
CA Coachella	●			CA Santa Barbara	●		●
CA Dublin San Ramon Services District	●			CA Seaside			●
CA Encinitas			●	CA Southern California Edison - Catalina Operation	●		
CA Central Contra Costa Sanitary District	●			CA Stockton East Water District			●
CA Delta Diablo Sanitation District	●			CA Yountville			●
CA Fullerton	●			CA West Hollywood	●		
CA Gilroy	●			CO Adams County			●
CA Hanford			●	CO Aspen	●	●	●
CA Hayward			●	CO Aurora	●		●
CA Hollister	●			CO Boulder	●	●	●
CA Huntington Beach	●			CO Boulder County	●		

Client	Organizational Assessment	Executive Search	Strategic Plan Facilitation	Client	Organizational Assessment	Executive Search	Strategic Plan Facilitation
CO Brighton				CT Groton			
CO Centennial				CT Manchester			
CO Denver				CT Mansfield			
CO Denver Metro Water Recovery				CT Meriden			
CO Denver Wastewater				CT Windsor			
CO Elbert County				DC DC Water			
CO Erle				DC District of Columbia Department of Public Works			
CO Evans				DC International City/County Management Association			
CO Fort Collins				DC National League of Cities			
CO Golden				DC USAID - Moldova			
CO Greeley				DE Kent County			
CO Health District of Northern Larimer County				DE Lewes			
CO Jefferson County				DE Milford			
CO La Plata County				DE Milton			
CO Lafayette				DE Rehoboth Beach			
CO Louisville				DE Wilmington			
CO Loveland				DE Wilmington Utilities			
CO Loveland Fire Rescue Authority				FL Boca Raton			
CO Metro Water Reclamation District				FL Deerfield Beach			
CO Northglenn				FL Palmetto Bay			
CO Pueblo West Metropolitan District				FL Palmetto County			
CO Routt County				FL Pinellas County			
CO Summit County				FL Pompano Beach Utility Department			
CO Thornton				FL Sanford			
CO Timnath				FL Tampa Bay Water			
CO Westminster				FL Tampa Water Department			
CO Windsor				FL Winter Haven			
CT Connecticut Town & City Management Association				GA Decatur			
CT Enfield				GA Jackson County Water & Sewerage Authority			
CT Greenwich				GA Roswell			

Client	Organizational Assessment	Executive Search	Strategic Plan Facilitation	Client	Organizational Assessment	Executive Search	Strategic Plan Facilitation
IA Cedar Rapids	●	●		KS Shawnee	●		●
IL Carbondale	●			KS Tonganoxie		●	●
IL DuPage County	●			KS United Government of Wyandotte County & Kansas City			●
IL Elgin			●	KS Water District No. 1 Johnson County (WaterOne)			●
IL Evanston	●			KY Lexington-Fayette Urban County Government	●		
IL Geneva			●	KY Louisville Water Company	●		
IL Gurnee			●	KY Paducah			●
IL Lisle			●	KY Sanitation District #1 of Northern Kentucky			●
IL Peoria County		●		LA New Orleans	●		
IL Schaumburg	●			LA Orleans Parish School Board		●	
IL Warrenville	●			LA Sewerage & Water Board of New Orleans		●	●
IL Woodridge			●	MA Franklin County	●		
IN Bloomington	●	●		MA Guidehouse	●		
IN Indianapolis	●			MA Lexington			●
IN Monroe County	●			MA Methuen	●		
IN Munster	●		●	MA Nantucket	●		●
KS Baldwin City		●	●	MA Pioneer Valley Planning Commission	●		
KS Bonner Springs	●			MA Sherborn	●		
KS Edgerton		●		MA Shrewsbury			●
KS Edwardsville			●	MA Westborough	●		●
KS Eudora			●	MA Wood Hole, Martha's Vineyard, and Nantucket Steamship Authority			●
KS Garden City	●			MD Aberdeen	●	●	●
KS Gardner			●	MD Annapolis			●
KS Hutchinson	●			MD Baltimore		●	
KS Johnson County		●	●	MD Baltimore Department of Public Works	●		●
KS Lawrence			●	MD Berwyn Heights		●	
KS Merriam		●		MD Cambridge		●	
KS Olathe	●		●	MD Charles County		●	
KS Roeland Park			●	MD College Park	●		●
KS Saline County			●	MD Colmar Manor			●

Client		Organizational Assessment	Executive Search	Strategic Plan Facilitation	Client		Organizational Assessment	Executive Search	Strategic Plan Facilitation
MD	Galthersburg				MI	Rochester Hills			
MD	Garrett Park				MI	Royal Oak			
MD	Greenbelt				MI	Saline			
MD	La Plata				MI	Three Rivers			
MD	Maryland Municipal League				MN	Cloquet			
MD	Maryland State Judiciary				MN	Chanhassen			
MD	Mount Rainier				MN	Edina			
MD	New Carrollton				MN	Lake Elmo			
MD	Ocean City				MN	Minnesota Municipal League			
MD	Ocean Pines Association				MN	Northfield			
MD	Riverdale Park				MN	Rochester Public Utilities			
MD	Rockville				MO	Chesterfield			
MD	Somerville				MO	Clayton			
MD	St. Michaels				MO	Lee's Summit			
MD	Sykesville				MO	Maryville			
MD	Takoma Park				MO	Metropolitan St. Louis Sewer District			
MD	Talbot County				MO	Missouri Municipal League			
MD	University Park				MO	North Kansas City			
MD	Westminster				MO	Parkville			
MD	Worcester County				MO	Platte City			
MI	Ada				MO	Sikeston			
MI	Ann Arbor				MO	St. Joseph			
MI	Ann Arbor Transportation Authority				MO	St. Louis County			
MI	Canton Township				MO	University City			
MI	Ferndale				MO	Wentzville			
MI	Holland				MT	Helena			
MI	Jackson County				NC	Albemarle			
MI	Midland				NC	Asheville			
MI	Midland Community Foundation				NC	Brevard			
MI	Novi				NC	Brunswick			

Client	Organizational Assessment Executive Search Strategic Plan Facilitation			Client	Organizational Assessment Executive Search Strategic Plan Facilitation		
NC Cary				NH Keene			
NC Charlotte				NJ Jersey Water Works			
NC Charlotte Water				NJ New Jersey Health Initiative			
NC Creedmoor				NM Las Cruces			
NC GoTriangle Transit				NY Batavia			
NC Greensboro				NY Edgemont			
NC Guilford County				NY Ithaca			
NC Harnett County				NY Livingston County Water and Sewer Authority (LCWSA)			
NC High Point				NY Oneonta			
NC Matthews				NY Rochester			
NC Lowell				NY Wainscott			
NC Onslow Water & Sewer Authority (ONWASA)				OH Avon Lake			
NC Orange County				OH Beaver Creek Township			
NC Orange Water and Sewer Authority				OH Blendon Township			
NC Raleigh				OH Blue Ash			
NC Raleigh Public Utilities Department				OH Centerville			
NC Rolesville				OH Cincinnati			
NC Swansboro				OH Clear Creek Township			
NC Wake County				OH Cleveland Heights			
NC Wake Forest				OH Columbus			
NC Wilmington				OH Dayton			
NC Winston-Salem				OH Delaware			
NC Winston-Salem/Forsyth County Utilities				OH Delaware County			
NC Zebulon				OH Delaware County EMS			
ND Minot				OH Delaware County Transit			
NE Hastings				OH Dublin			
NE La Vista				OH Eastgate Regional Council of Governments			
NE Lincoln				OH Franklin County			
NE Reno				OH Gahanna			
NH Hanover				OH Georgetown			

Client	Organizational Assessment	Executive Search	Strategic Plan Facilitation	Client	Organizational Assessment	Executive Search	Strategic Plan Facilitation
OH Granville				OH Union County			
OH Greater Cincinnati Water Works				OH Upper Arlington			
OH Greene County				OH Washington Township			
OH Hilliard				OH West Chester Township			
OH Hudson				OH Westerville			
OH Jackson Township				OH Worthington			
OH Miami Township				OH Wyoming			
OH Miami University				OH Xenia			
OH Miami Valley Risk Management Authority				OK Lawton			
OH Montgomery County Environmental Services				OK Norman			
OH Monroe				OR Beaverton			
OH Moraine				OR Bend			
OH National Association of State & Local Equity Funds				OR Clean Water Services			
OH Newark				OR Confederated Tribes of Grand Ronde			
OH Oberlin				OR Gresham			
OH Ohio City/County Management Association				OR Hillsboro			
OH Owens-Corning				OR Hood River			
OH Piqua				OR Lake Oswego			
OH Portsmouth				OR Lane County			
OH Powell				OR McMinnville			
OH Prairie Township				OR Metro			
OH Preservation Parks of Delaware County				OR Multnomah County			
OH Riverside				OR Newberg			
OH Sandusky				OR Salem			
OH Sharonville				OR Scappoose			
OH Solid Waste Authority of Central Ohio (SWACO)				OR Sunrise Water Authority			
OH Solon				OR Tigard			
OH The Port, an Ohio Port Authority				OR Tualatin			
OH Toledo				OR Tualatin Hills Park & Recreation District			
OH Troy				OR Washington County			

Client	Organizational Assessment	Executive Search	Strategic Plan Facilitation	Client	Organizational Assessment	Executive Search	Strategic Plan Facilitation
OR Wilsonville	●		●	SC Spartanburg Water System	●		
PA Abington Township			●	TN Farragut			●
PA Allentown	●			TN Johnson City	●		
PA Association for Pennsylvania Municipal Management (APMM)			●	TN Johnson County			●
PA Bethel Park	●			TN Metro Government of Nashville and Davidson Co.	●		
PA Breakneck Creek Regional Authority		●		TN Metro Water Services of Nashville and Davidson County	●		●
PA Capital Region Water			●	TX Abilene		●	
PA Carlisle Borough		●	●	TX Allen			●
PA Duquesne	●			TX Anna			●
PA East Buffalo	●			TX Austin	●		●
PA East Whiteland Township	●			TX Brownsville Public Utilities Board			●
PA Falls Authority	●			TX Cedar Hill			●
PA Farrell	●	●		TX Cedar Park	●		
PA Ford City Borough	●			TX Dallas			●
PA Harrisburg	●			TX Denton			●
PA Hazleton	●			TX Harris County	●		
PA Lancaster County	●			TX Lancaster		●	●
PA Lehigh County Authority			●	TX Laredo			●
PA Lewisburg	●			TX League City			●
PA Lower Paxton Township				TX Marshall			●
PA Nanticoke	●			TX New Braunfels	●		
PA Pittsburgh Water & Sewer Authority	●		●	TX North Texas Municipal Water Department			●
PA Reading	●			TX Pearland	●		●
PA St. Marys	●			TX Plano			●
PA State College			●	TX Prosper			●
RI Westerly	●			TX Sugar Land			●
SC Charleston	●			TX Temple			●
SC Hilton Head			●	TX The Woodlands	●		●
SC Mount Pleasant Waterworks		●		TX University Park		●	●
SC Renewable Water Resources (ReWa)	●			UT Murray			●

Client		Organizational Assessment	Executive Search	Strategic Plan Facilitation	Client		Organizational Assessment	Executive Search	Strategic Plan Facilitation
UT	South Jordan				VA	Vienna			
VT	Burlington Water Resources				VA	Virginia Beach			
VT	Montpeller				VA	Virginia Retirement System			
VA	Albemarle County				VA	Warrenton			
VA	Alexandria				VA	Washington County Service Authority			
VA	Appomattox River Water Authority				WA	Bellevue			
VA	Arlington County				WA	Bothell			
VA	Ashland				WA	Camas			
VA	Bedford County				WA	Central Piece Fire and Rescue			
VA	Charlottesville				WA	Kirkland			
VA	Chesapeake				WA	Mercer Island			
VA	Fairfax				WA	Richland			
VA	Fairfax County				WA	Sammamish			
VA	Fairfax County Water Authority				WA	Sequim			
VA	Fairfax Water				WA	Shoreline			
VA	Fauquier County				WA	Spokane Regional Health District			
VA	Fredericksburg				WI	Eau Claire			
VA	Gloucester County				WI	Central Brown County Water Authority			
VA	Hampton				WI	Green Bay/Central Brown County			
VA	Harrisonburg				WI	Mequon			
VA	Harrisonburg-Rockingham Regional Sewer Authority (HRRSA)				WI	Milwaukee Metropolitan Sewerage District			
VA	Leesburg				WI	Oak Creek			
VA	Loudoun County				WI	Shorewood			
VA	Newport News				WI	Washington County			
VA	Newport News Waterworks				WI	Wauwatosa			
VA	Prince William County				WV	Monongalia County			
VA	Purcellville				WV	Morgantown			
VA	Rivanna Water & Sewer Authority				WY	Sheridan			
VA	Suffolk				PR	Puerto Rico Aqueduct & Sewer Authority (PRASA)			

APPENDIX B: ATTACHMENTS A-E

Appendix B: Attachments A-E



ATTACHMENT A

NON-DISCRIMINATION AFFIDAVIT

I, the undersigned, hereby duly sworn, depose and say that the organization or business entity represented herein shall not discriminate against any person in its operations, activities, or delivery of services under any agreement it enters with the City of Belle Isle. The same shall affirmatively comply with all applicable provisions of Federal, State, and local equal employment laws and shall not engage in or commit any discriminatory practice against any person based on race, age, religion, color, gender, sexual orientation, national origin, marital status, physical or mental disability, political affiliation or any other factor which cannot be lawfully used as a basis for service delivery.

It is the policy of the City of Belle Isle that Minority/Women-Owned Business Enterprises (MWBE) shall have the maximum opportunity to participate in all contracts. The City of Belle Isle will accept MWBE certifications from Orange County and any State of Florida certification.

Further, City Purchasing Police Section 1.8 requires that all contracting agencies of the City, or any department thereof, acting for or on behalf of the City, shall include in all contracts and property contracts hereinafter executed or amended in any manner or as to any portion thereof, a provision obligating the Contractor not to unlawfully discriminate (as proscribed by federal, State, county, or other local law) on the basis of the fact or perception of a person's race, color, creed, religion, national origin, ancestry, sexual orientation, gender identity or expression, marital status, pregnancy, familial status, veterans status, political affiliation, or physical or mental disability and such person's association with members of classes protected under this chapter or in retaliation for or opposition to any practices forbidden under this chapter against any employee of, any City employee working with, or applicant for employment with such Contractor and shall require such Contractor to include a similar provision in all subcontracts executed or amended there under.

By: *Claire Conto*
Title: Executive Vice President

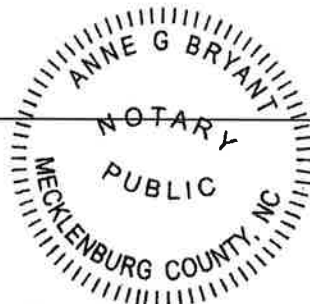
STATE OF ~~FLORIDA~~ North Carolina
COUNTY OF Mecklenburg

Sworn to and subscribed before me this 18th day of April, 2023, by

Anne G. Bryant
Anne G. Bryant
Signature of Notary Public Expires 5.2.26

☒ Personally known, or
☐ Produced Identification

Type of ID Produced: _____



ATTACHMENT B

NON-DEBARMENT AFFIDAVIT

Page 1 of 2

Clair Conti Being first duly sworn, deposes and says that:

He/She is Executive Vice President
of Raf-telis the Proposer ("Respondent")
that has submitted the attached Proposal. By offering submission to this RFP, the Respondent certifies
and affirms that to the best of their knowledge and belief, that:

1. The Respondent is not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in any transaction of any Federal, State, or local agency; and
2. The Respondent has not within three years preceding this Proposal been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State, or local) transaction or contract under a transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records; making false statements; or receiving stolen property; and
3. The Respondent is not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State, or local) with commission of any of the offenses enumerated in paragraph 2 of this affidavit; and
4. The Respondent has not, within a three-year period preceding this Proposal, had one or more public transactions (Federal, State, or local) terminated for cause or default; and
5. The Respondent will submit a revised Debarment Affidavit immediately if the status changes.

If the Respondent cannot certify that they are not debarred, he/she shall explain with this submittal. An explanation will not necessarily result in denial of participation in a contract. Failure to submit a debarment affidavit will disqualify the Contractor from any contract award.

_____ Check here if an explanation is attached to this affidavit.

NON-DEBARMENT AFFIDAVIT

Page 2 of 2

By: Elaine Conti
Print Name: Elaine Conti
Title: Executive Vice President
Date: 4-18-2023

STATE OF ~~FLORIDA~~ North Carolina
COUNTY OF Mecklenburg

The foregoing Agreement was acknowledged before me this 18th day of April 2023 by, Elaine Conti who has affirmed that he/she has been duly authorized to execute the above document. He/she is personally known to me or has produced personally owned as identification.

NOTARY'S SEAL:

Anne G. Bryant

NOTARY PUBLIC, STATE OF ~~FLORIDA~~ NC

Anne G. Bryant
Name of Acknowledger, typed, printed, or Stamped



ATTACHMENT C

DRUG-FREE WORKPLACE CERTIFICATION

Preference must be given to vendors submitting a certification with their bid/proposal certifying they have a drug-free workplace in accordance with Section 287.087, Florida Statutes. This requirement affects all public entities of the State and becomes effective January 1, 1991. The special condition is as follows:

IDENTICAL TIE BIDS - Preference shall be given to businesses with drug-free workplace programs. Whenever two or more bids that are equal with respect to price, quality, and service are received by the State or by any political subdivision for the procurement of commodities or contractual services, a bid received from a business that certifies that it has implemented a drug-free workplace program shall be given preference in the award process. Established procedures for processing tie bids will be followed if none of the tied vendors have a drug-free workplace program; a business shall:

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
3. Give each employee engaged in providing the commodities or contractual services that are under bid a copy of the statement specified in subsection (1).
4. In the statement specified in subsection (1), notify the employees that, as a condition of working on the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of chapter 893 or any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five (5) days after such conviction.
5. Impose a sanction on or require satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community by any employee who is so convicted.
6. Make a good faith effort to maintain a drug-free workplace through the implementation of this section.

As the person authorized to sign the statement, I certify that this firm complies fully with the above requirements.

Raftelis

COMPANY NAME

Elaine Conner

VENDOR'S SIGNATURE

Must be executed and returned with the attached Proposal to be considered.

ATTACHMENT D

NON-COLLUSIVE AFFIDAVIT

State of North Carolina

County of Mecklenburg

Elaine Conti being first duly sworn deposes and says that:

1. He/she is the Executive Vice President, (Owner, Partner, Officer, Representative, or Agent) of Raffetis the Proposer that has submitted the attached Proposal;
2. He/she is fully informed respecting the preparation and contents of the attached Proposal and of all pertinent circumstances respecting such Proposal.
3. Such a Proposal is genuine and is not a collusive or sham Proposal.
4. Neither the said Proposer nor any of its officers, partners, owners, agents, representatives, employees, or parties in interest, including this affiant, have in any way colluded, conspired, connived, or agreed, directly or indirectly, with any other Proposer, firm, or person to submit a collusive or sham Proposal in connection with the Work for which the attached Proposal has been submitted; or to refrain from proposing in connection with such Work; or have in any manner, directly or indirectly, sought by agreement or collusion, or communication, or conference with any Proposer, firm, or person to fix the price or prices in the attached Proposal or of any other Proposer, or to fix any overhead, profit, or cost elements of the Proposal price or the Proposal price of any other Proposer, or to secure through any collusion, conspiracy, connivance, or unlawful agreement any advantage against (Recipient), or any person interested in the proposed Work;
5. The price or prices quoted in the attached Proposal are fair and proper and are not tainted by any collusion, conspiracy, connivance, or unlawful agreement on the part of the Proposer or any other of its agents, representatives, owners, employees, or parties in interest, including this affiant.

By: Elaine Conti

Title: Executive Vice President

Company: Raffetis

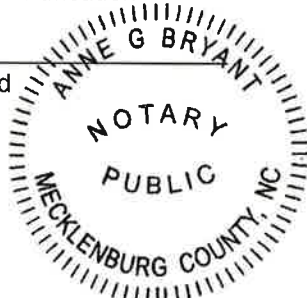
STATE OF ~~FLORIDA~~ North Carolina
COUNTY OF Mecklenburg

Sworn to and subscribed before me this 18th day of April,
2023,
by Elaine Conti

☒ Personally known, or
☐ Produced Identification

Type of ID Produced

Anne G. Bryant
Signature of Notary Public
Expired 5.2.26



ATTACHMENT E

CERTIFICATION PURSUANT TO FLORIDA STATUTE § 287.135

I, Elaine Conti, on behalf of Raftelis
Print Name and Title Company Name
certify that Raftelis does not:

1. Participate in a boycott of Israel; and
2. Is not on the Scrutinized Companies that Boycott Israel List; and
3. Is not on the Scrutinized Companies with Activities in Sudan List; and
4. Is not on the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List; and
5. Has not engaged in business operations in Syria.

Submitting a false certification shall be deemed a material breach of contract. In writing, the City shall provide notice to the Contractor of the City's determination concerning the false certification. The Contractor shall have ninety (90) days following receipt of the notice to respond in writing and demonstrate that the determination of false certification was made in error. If the Contractor does not demonstrate that the City's determination of false, certification was made in error then the City shall have the right to terminate the contract and seek civil remedies pursuant to Florida Statute § 287.135.

Section 287.135, Florida Statutes, prohibits the City from: 1) Contracting with companies for goods or services in any amount if at the time of bidding on, submitting a proposal for, or entering into or renewing a contract if the company is on the Scrutinized Companies that Boycott Israel List, created pursuant to Section 215.4725, FS or is engaged in a boycott of Israel; and

2) Contracting with companies, for goods or services over \$1,000,000.00 that are on either the Scrutinized Companies with activities in the Iran Petroleum Energy Sector List, created pursuant to s. 215.473, or are engaged in business operations in Syria.

As the person authorized to sign on behalf of the Contractor, I hereby certify that the company identified above in the section entitled "Contractor Name" does not participate in any boycott of Israel, is not listed on the Scrutinized Companies that Boycott Israel List, is not listed on either the Scrutinized Companies with activities in the Iran Petroleum Energy Sector List, and is not engaged in business operations in Syria. I understand that pursuant to section 287.135, Florida Statutes, the submission of a false certification may subject the company to civil penalties, attorney's fees, and/or costs. I further understand that any contract with the City for goods or services may be terminated at the option of the City if the company is found to have submitted a false certification or has been placed on the Scrutinized Companies with Activities in Sudan list or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List.

Raftelis
COMPANY NAME
Elaine Conti Elaine Conti
PRINT NAME SIGNATURE
Executive Vice President
TITLE

Must be executed and returned with the attached Proposal to be considered.