



PROPOSAL

City of Belle Isle

Staffing Model Analysis

RFP No. 2023-06

BerryDunn
2211 Congress Street
Portland, ME 04102-1955
207-541-2200

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Proposal Due Date:
May 4, 2023 by 3:00 p.m.

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1. Letter of Submission

May 4, 2023

City of Belle Isle
Attn: Yolanda Quiceno, City Clerk
1600 Nela Ave
Belle Isle, FL 32809

Dear Yolanda Quiceno:

On behalf of Berry, Dunn, McNeil & Parker, LLC (BerryDunn), I am pleased to submit this proposal in response to the City of Belle Isle's (the City's) Request for Proposals (RFP) No. 2023-06 for a Staffing Model Analysis. We have read the City's request and reviewed its terms and conditions and the contents presented therein. Our proposal is a firm and irrevocable offer valid for 90 calendar days from the proposal deadline of May 4, 2023.

BerryDunn is a nationally recognized independent management and IT firm, headquartered in Portland, Maine with nine office locations nationally. **Focused on inspiring organizations to transform and innovate**, we are a stable and well-established firm that has preserved our core values and reputation for excellence throughout our 49-year history. We have enjoyed steady growth by providing consistent, high-quality services to our clients in all 50 states—including numerous clients in the State of Florida (the State)—Puerto Rico, and Canada.

Our firm's culture is centered on a deep understanding of our clients' commitment to serving the public. The human aspect of projects can often be forgotten in the maze of regulatory changes and legal requirements with which public-sector organizations must comply. BerryDunn proudly tailors each of its projects to recognize the work our clients do every day. We care about what we do, and we care about the people impacted by our work—including those at the City.

As evident in the key points that follow, we have a strong desire to partner with the City on its Staffing Model Analysis; a clear understanding of the work effort required and the City's needs; extensive experience conducting similar projects in the State and nationally; and several notable attributes that differentiate us from other proposers.



Our decades of experience performing organizational, operational, and staffing assessments

With almost three decades of experience, organizational and operational assessments, staffing and resource allocation, and organizational change management (OCM) are core services for our firm. This broad exposure gives us a strong understanding of the City's requested scope of work and the insights necessary to execute on it successfully. We bring hands-on experience and leverage extensive project backgrounds to help communities optimize service delivery while maintaining satisfaction.



Our highly skilled project team members who work exclusively with local government clients

BerryDunn's Local Government Practice Group is dedicated to serving public-sector clients, and 75% of our team members are former public-sector employees. Our team has a deep understanding of the opportunities and challenges local governments face in providing services. Our proposed project manager, Shannon Flowers, brings firsthand local government experience and an eye for efficiency and effectiveness, considering the organizational, operational, technological, and budgetary aspects of the clients she serves. Other team members bring experience and expertise among practices such as

policing, public works, community development, human capital management (HCM), OCM, and finance, among others.



Our integrated project management and change management methodologies

Our work for the City will be guided by established project management methodologies and best practices as defined by the Project Management Institute® (PMI®) as well as inputs from Agile and Lean principles. We know the important role organizational change management (OCM) plays in related projects; therefore, we integrate a disciplined change management approach to our work, using the Prosci® change management methodology as a foundation. This integration will help ensure the City's stakeholders have opportunities to provide input, support, and buy-in for all decisions and outcomes in this process. We recognize that an initiative such as this can significantly impact project stakeholders and result in resistance and fear as to what the future will hold. With this in mind, our approach incorporates intentional and thoughtful change readiness and management activities to properly support both the project and the City's stakeholders in this process.



Our focus on inclusive and participatory engagement and transparent and detailed communications

Promoting consensus among stakeholders and employees is critical to the success and longevity to initiatives such as the one requested by the City. This is achieved through actively and consistently engaging project team members throughout the process. As such, we will prepare communication drafts throughout the process to send all employees project updates and anticipated next steps to best promote buy-in, trust, consensus, and support for the process and its outcomes.



Our demonstrated commitment to serving clients in the State

Our commitment to the State is evident in our experience conducting numerous projects for more than 30 local government clients and our project members' locality. Our firm employs 18 employees who live in the State. Many of our projects conducted in the State are like the work effort requested by the City, including business process improvement and strategic planning efforts in the City of Cooper City, City of Coral Springs, City of Groveland, and City of Lauderhill. We will leverage this experience and our firsthand knowledge of the State's public-sector landscape to provide the City with lessons learned and unique insights in this process.

As a principal in BerryDunn's Local Government Practice Group, I can attest to the accuracy of our materials, and I am legally authorized to bind, negotiate, make presentations on behalf of, and commit our firm and our resources.

If you have any questions regarding our proposal or updates during the evaluation process, please consider me your primary point of contact and feel free to contact me directly.

Sincerely,

Seth Hedstrom, PMP®, LSSGB, Principal
2211 Congress Street, Portland, ME 04102-1955
t/f: 207-541-2212 | e: shedstrom@berrydunn.com

2. Firm Qualifications

2.1 Firm Overview

BerryDunn is a nationally recognized independent management and IT consulting firm focused on inspiring organizations to transform and innovate. As a Limited Liability Company formed in 1974 with 54 principals, 29 owners, and nine office locations, **we have experienced sustained growth throughout our 49-year history.**

We employ more than 800 staff members—including more than 300 in our Consulting Services Team. From extensive project experience for more than **400 state, local, and quasi-governmental agencies**, our team brings valuable perspectives to every engagement. Additionally, our team has prior experience serving state and local government agencies, providing them with an in-depth understanding of government operations, staffing needs, budgetary constraints, and the business processes required to provide necessary services to the internal divisions and the constituents the City serves.

Our firm provides a full range of professional services that supports our ability to complete tasks outlined by the City. These include:

- **Organizational, Operational, and Staffing Analyses**
- Business Process Improvement, Reviews, and Redesign
- OCM
- Leadership and Organization Development
- Enterprise and Departmental Strategic Planning
- Software Planning and Procurement
- Software Implementation Project Management and Oversight Performance Analyses
- Master Planning
- Cost of Service and Fee Studies
- Project Assessments and Remediation
- IT Assessments
- IT Strategic Planning

Figure 1 illustrates the overall organization of BerryDunn's Local Government Practice Group. We provide unparalleled expertise and unique insights across these practices, supporting our clients in solving some of their biggest challenges and addressing opportunities to improve and plan.

Figure 1: Local Government Practice Group Specialization



Commitment to Diversity, Equity, and Inclusion (DEI)

BerryDunn has advanced community, diversity, and empathy in a workplace where everyone is respected, seen, and heard. We foster DEI by committing to identifying institutional and systemic barriers. We engage in meaningful conversation to learn and grow continuously, and we embrace diverse perspectives and backgrounds regardless of race, ethnicity, age, sexual orientation, gender identity or expression, religion, or disability. Our CEO Council on Diversity, Equity, Inclusion, Belonging, and Access (DEIBA Council) leads meaningful progress toward being a diverse, equitable, and inclusive organization.

As a firm, we have put practices and tools in place to help ensure we have a culture of DEI within our firm and the community. We offer DEI trainings for our employees that are developed and executed by our DEIBA Council. Further, we partner with organizations and nonprofits in our community headquarters of Portland, Maine to assist in DEI initiatives in the surrounding area. This includes local efforts to combat racism and create a more equitable future for women, the LGBTQIA+ community, and other marginalized minority groups.



In terms of the City's requested work effort, BerryDunn shares the City's focus on and commitment to DEI. That said, the City can expect that we will exhibit care and respect for others, build trust with the City's stakeholders, establish mutual buy-in for the process, and learn from each other.

2.2 Relevant Experience

Commitment to the State

With BerryDunn, the City will be served by a firm licensed to do business in the State and with a demonstrated commitment to serving its clients. Notably, our experience includes successfully completing projects of similar size and scope to that of the City. Below, we highlight a portion of our nearly three dozen clients in the State for the City's further consideration. We will leverage this experience in our work with the City.

- Alachua County
- City of Boca Raton
- City of Boynton Beach
- City of Cape Coral
- City of Cooper City
- City of Coral Springs
- City of Fernandina Beach
- City of Fort Lauderdale
- City of Gainesville
- City of Groveland
- City of Homestead
- City of Largo
- City of Lauderdale Lakes
- City of Lauderhill
- City of Ormond Beach
- City of Palm Coast
- City of Parkland
- City of Port Orange
- City of Port St. Lucie
- City of Sanibel
- City of Tampa
- City of Zephyrhills
- Collier County
- Hillsborough County
- Manatee County
- Monroe County
- Pasco County
- Town of Longboat Key
- University of Florida
- Village of Palm Springs
- Village of Pinecrest

Organizational Development

BerryDunn has been providing services like those requested for more than 30 years. Through this experience, we have assisted with a variety of related services, including:

- Organizational, operational, and staffing assessments
- Community/stakeholder engagement
- Business process improvement
- OCM
- Enterprise and departmental strategic planning
- Leadership development
- Executive coaching
- Performance measurement

Table 1, below and on the following pages, summarizes our firm's comparable experience for local government clients from the past three years.

Table 1: Experience Performing Similar Organizational Development Services

Agency	Organizational, Operational, and Staffing Assessments	Strategic Planning and Facilitation	Leadership and Team Development and Coaching
City of Albany, Georgia	✓		
City of Beaverton, Oregon	✓	✓	✓
City of Cooper City, Florida		✓	
City of Creswell, Oregon		✓	
City of Duluth, Minnesota	✓		
City of Edgewater, Colorado		✓	
City of Ennis, Texas		✓	
City of Frisco, Texas	✓		✓
City of Gresham, Oregon	✓	✓	
City of Groveland, Florida		✓	
City of Lauderdale, Florida		✓	
City of Menifee, California		✓	
City of Milton, Georgia		✓	
City of New Braunfels, Texas		✓	
City of Newton, Iowa	✓		
City of Northglenn, Colorado	✓	✓	
City of Oxnard, California	✓		
City of Pasco, Washington	✓		
City of Redlands, California		✓	

Agency	<i>Organizational, Operational, and Staffing Assessments</i>	<i>Strategic Planning and Facilitation</i>	<i>Leadership and Team Development and Coaching</i>
City of Rockville, Maryland			✓
City of Shawnee, Kansas		✓	
City of St. Charles, Illinois		✓	
City of Washougal, Washington		✓	
City of Wausau, Wisconsin		✓	
City of Westminster, Colorado		✓	✓
Jefferson County, Washington		✓	
Lake County, Illinois		✓	
Lancaster County, Nebraska		✓	
Lane County, Oregon		✓	
Marion County, Oregon	✓		
Marquette County, Michigan		✓	
Newton County, Georgia		✓	
Pitkin County, Colorado	✓		
San Mateo County, California	✓		✓
Santa Clara County, California		✓	
Tompkins County, New York		✓	
Town of Cromwell, Connecticut	✓		✓
Town of Holliston, Massachusetts		✓	
Weld County, Colorado		✓	

2.3 References

Below and on the following page, we provide reference information for several clients who can speak to the quality and satisfaction we deliver on comparable engagements.



City of Gresham, Oregon

Bill Smith, Deputy Chief

503-618-2396 | william.smith@greshamoregon.gov

1333 NW Eastman Parkway, Gresham, OR 97030

In November of 2021, the City of Gresham contracted with BerryDunn to conduct a systematic and thorough study of its police services, including core business practices and functions, culture, and workloads and associated duties. Our initial findings, based on a review of various organizational data and on-site interviews with Gresham Police Department (GPD) staff and other key holders during the first six weeks of this project, identified several areas requiring prompt attention.



Village of Oak Park, Illinois
Rasheda Jackson, Assistant Village Attorney
708-358-5700 | rjackson@oak-park.us
123 Madison Street, Oak Park, IL 60302

BerryDunn was engaged to help determine the extent to which Oak Park Police Department (OPPD) is effective and equitable in the delivery of law enforcement services to all members of the community and specifically to people of color. The purpose of the study was to recommend changes to improve techniques, policies, and practices of the OPPD. BerryDunn led four distinct, yet overlapping projects: Full management and operational assessment study, audit of race equity issues, recommendations for alternative response to traditional police services, and fair and impartial policing benchmarking.



City of Groveland, Florida
Timothy Maslow, Community Development Director
101 East Broad Street, Groveland, FL 34736
352-250-7578 | timothy.maslow@groveland-fl.gov

The City engaged BerryDunn to help address the changing needs of its residents, businesses, and visitors and develop a citywide strategic plan to help navigate its inevitable growth. The City sought collaboration in its approach to information-gathering and recommendations development. We provided a mix of independent and partnered activities, including reviewing existing documents and data; conducting interviews; developing a customized Social Pinpoint site; and facilitating a community open house. We worked with the City's steering committee to facilitate strategic planning workshops. We are currently working with department leadership to develop growth, revenue, and budget forecasting projections; prioritize and sequence capital investments and services; and forecast the City's personnel organizational chart prior to developing the Growth, Capital Investment, Services Prioritization, and Staffing Report.



Weld County, Colorado
Cheryl Pattelli, Chief Financial Officer
970-400-4451 | cpattelli@weldgov.com
1150 O Street, Greeley, CO 80631

Looking to retain its scenic mountain ranges, agricultural lands, and thriving communities and with a desire for balanced growth and innovation, the County retained BerryDunn to assess its current environment and effectively engage stakeholders in developing a framework for a strategic plan. The previous strategic plan had not been revised since 2015, and the County sought assistance in revising its goals, vision statement, values, and guiding principles. We conducted priority setting sessions with the County Board to identify priorities, values, and guiding principles, and facilitated an interdepartmental mission and vision statement development workshop. After conducting interviews with staff and work teams and distributing a survey questionnaire to County staff, we analyzed and synthesized the information in an existing conditions and future needs report. Following subsequent strategic plan development workshops, we developed a strategic plan with measurable and quantifiable goals for the next five years, timetables for achievement, and ways to monitor progress and performance in the future.

3. Approach and Methodology

3.1 Project Understanding

Home to approximately 7,100 residents, this Orange County suburb offers a rural feel while being just south of all the amenities Orlando has to offer. The City's elected, appointed, and 40 full-time employees work diligently to preserve the beauty and quality of its chain of lakes, offer high-quality public schools, and provide a safe place to live.

Focused on the City's development, growth, and success, the City Council and City Manager seek a qualified consultant to assist in evaluating its current staffing, organization, and operations to create a more productive and efficient government body. In partnership with a highly qualified consulting firm, the City seeks guidance in reviewing current staffing conditions, evaluating future service demands, and identifying operational and process improvements that will enhance services for customers and achieve additional efficiencies.

Recognizing the importance of best serving its internal and external stakeholders at an optimal level, the City desires a Staffing Model Analysis that will gauge how well resources are being used; how well its processes produce desired outcomes; and whether current ways of doing business maximize productivity. The study will analyze staffing levels and advise on appropriate structure updates while maintaining sufficient support to serve City residents.

We recognize the City's desired Staffing Model Analysis must take into account the makeup of City staff—for instance, 29 of 40 full-time employees fall under the Belle Isle Police Department. As such, we thoughtfully composed a project team that includes the necessary expertise, such as that of a public safety expert, to help ensure an insightful and effective process for the City. Other team members bring expertise in organizational and operational assessment, public works, community development, HCM, OCM, and finance.

With BerryDunn, the City will also benefit from:

- Our rich background conducting projects of similar size and scope
- Our team approach that leverages the strengths and qualifications of all project team members, bringing in-depth insight and knowledge to the City's departments and functions within the organization
- Our proven yet flexible approach to help ensure the project maintains momentum, delivers desired outcomes, and stays within budget
- Our consideration for managing the people side of change, aligning with industry and regional best practices, and incorporating relevant expertise to deliver superior project outcomes

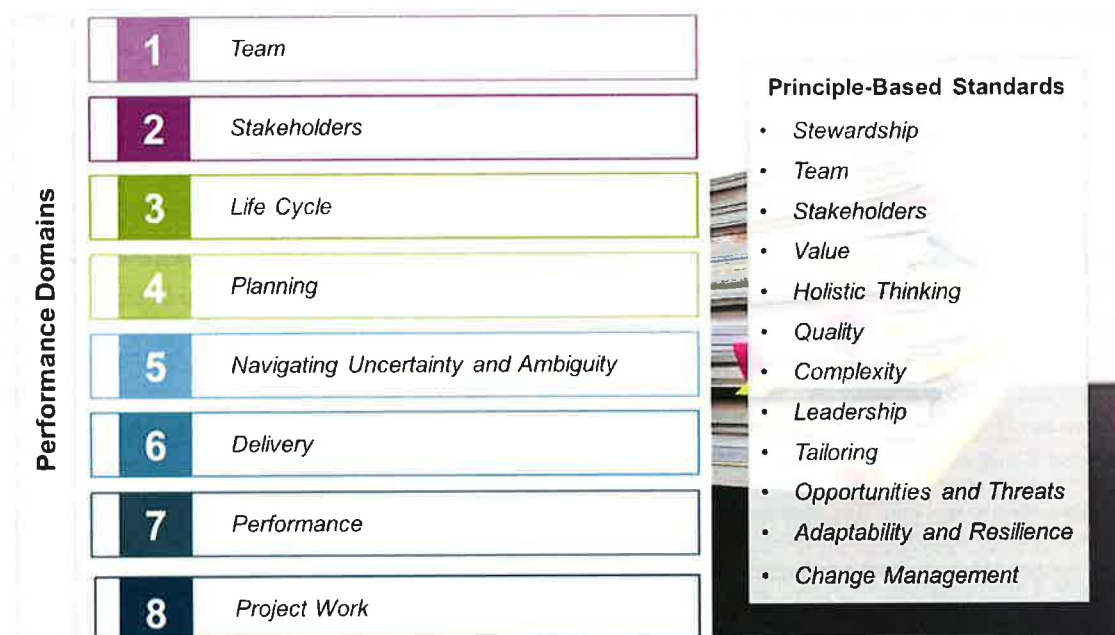
On the following pages, we outline our methodologies and proposal approach that we believe will aid the City in achieving and sustain its goals for the future, including its mission of enhancing the quality of life for its residents through **intelligent, inclusive leadership and outstanding municipal services.**

3.2 Guiding Methodologies

Project Management

To help ensure that project objectives are met, and initiation and completion of project work are conducted in a timely manner, each BerryDunn project is led by an experienced project manager who understands and utilizes project management best practices. Our Consulting Services Team employs project management best practices from PMI®'s A Guide to the Project Management Body of Knowledge Guide (PMBOK® Guide), Version Seven. Figure 2 illustrates the standards of project management as defined by performance domains and project delivery principles that are critical for effective delivery of project outcomes.

Figure 2: Performance Domains and Project Management Guiding Principles | PMBOK® Guide, Version Seven



Integrated Change Management Methodologies

A project of this nature will likely change workflows, processes, and even cultural attitudes within the City. BerryDunn has observed resistance to change in most of our business process improvement and efficiency consulting engagements. We will work with the City to proactively address resistance by engaging stakeholders at the right level throughout the project. From initial planning through implementation of our recommendations, we will build understanding for the need for change and gain support from all stakeholders.

Achieving results and outcomes depends on preparing and supporting people through change. BerryDunn has adopted the Prosci® change management methodology. BerryDunn believes so strongly in managing the people side of change that it has invested in the development of more than 100 Prosci® Certified Change Practitioners on our Consulting Services Team. According to research conducted by Prosci®, the likelihood of project success increases significantly relative to the level of change management focus applied to the project. Figure 3 shows that even small increases in focus on change

management, from “poor” to “fair” are likely to have a positive impact on change adoption and project success.

Figure 3: Impact of Change Management on Project Success



Consistent with the Prosci® methodology, the City can expect our change management approach to involve three stages, as described below and on the following page.

1. **Preparing for Change.** Developing change management strategies, based on input from the City's stakeholders on the existing environment
2. **Managing Change.** Overseeing assigned roles and tasks, providing training and coaching, using tools effectively, and executing a clear communication plan
3. **Reinforcing Change.** Evaluating action plans, reviewing the sustainability of change management activities, and promoting individual and team successes

The Prosci® methodology is a structured, adaptable, and repeatable approach to address the people side of change. This approach states that for change to work in an organization, individuals must be willing to change and understand change. Based on this belief, Prosci® developed the ADKAR change management approach, defined in Figure 4.

Figure 4: ADKAR Change Management Approach



BerryDunn offers a wide range of OCM consulting services to help clients communicate and educate stakeholders about future changes and provide a structured process to manage resistance that may surface. Additionally, our team proactively manages organizational change by involving stakeholders at key stages throughout the process to build support and buy-in for project outcomes.

BerryDunn's change practitioners are part of an internal Change Management Community of Practice, which meets quarterly to share methodologies, best practices, and lessons learned from our varied OCM project experiences.

We strive to be flexible when it comes to development and execution of our change management approach. We understand that no two engagements are exactly alike and believe that one of the primary reasons we have been successful with similar projects is our willingness to be flexible in adapting to our clients' unique needs.

Effective Information Gathering

We understand the need for qualitative context that complements quantitative data. Our team brings an impartial, objective, and cohesive methodology for gathering information from stakeholders and performing all project activities. Our methodology combines engaging a broad, diverse group of stakeholders in information-gathering and iterative discussion, with our project team's independent review, research, and knowledge of the public-sector landscape and industry trends and best practices. Prior to engaging in activities with stakeholders, our project team requests and perform reviews of relevant project background information so that they have a foundation—and are prepared—for all meetings, making fact-finding and focus groups as effective and efficient as possible.

Throughout all project phases, we work collaboratively with key stakeholders to understand their perspectives and needs and seek alignment for a unified vision and plan. Determining who we need to work with and how we need to work with them on this project is critically important for project success. For this reason, our methodology includes holding an initial planning meeting immediately after project start to help ensure we have a clear understanding of the stakeholders who need to be involved in the project, the project phases they should be involved in, and the methods of outreach and information gathering that will engage them. Before engaging stakeholders, we will collaborate with the City to agree upon a communication plan and recommend an initial message to stakeholders informing them of the project and our involvement. We expect that discussion about stakeholder involvement will be iterative and ongoing, so the topic will be revisited as needed, with a flexible approach to accommodate changes as project activities progress.

Our project team includes experienced facilitators who have the skills and knowledge necessary to establish credibility, build trust, elicit information, encourage collaboration, reach consensus, and develop buy-in with diverse groups of project participants. Our project team uses the Institute of Cultural Affairs (ICA) ToP® facilitation methodology to help ensure fact-finding sessions are highly collaborative and inclusive of all stakeholders. The ToP® methodology emphasizes structured participation that pulls information into the group's thinking process and creates a clear intention, helping members of the group align with one another and reach consensus.

Communication and Coordination

Clear and well-timed communication is vital to the success of any project. Our intent is to involve City team members as needed, make their roles and responsibilities clear, and minimize impact to their daily jobs. As part of the project plan, we will identify the communication and awareness needs of each project stakeholder and the method and frequency of communication to meet those needs.

BerryDunn fosters a work climate with a high tolerance for change and a high comfort level with market and regulatory shifts. Our experience allows us to anticipate areas that might pose challenges and rapidly develop approaches to mitigate these issues. BerryDunn's reputation for managing complex and challenging projects is based on successful planning, coordination, and completion of diverse activities.

DEI

BerryDunn's approach focuses on and reflects our firm's commitment to DEI. We recognize how important it is that we assemble a project team that understands what the City needs to do to conduct a sound work effort. We will work with the City—as well as internal and external DEI resources—to help ensure its work effort is conducted through an equity lens.

Together, we will exhibit care and respect for others, allowing individuals to speak for themselves and teach us through their own authentic experiences; build trust with the City's stakeholders and establish

mutual buy-in this process; and learn as much from you all as you will learn from us, as we all chart the best path toward the City's future. We look forward to coming together to make the City's stakeholders know they are heard and respected in this process.

3.3 Work Plan

BerryDunn strives to be flexible when it comes to development and execution of an effective work plan. We understand that no two projects are exactly alike and believe that **one of the primary reasons we have been successful with similar projects is our willingness to be flexible in adapting to our clients' unique needs.**

The overarching benefits the City can expect of our approach include:

- A methodology based on our extensive experience conducting similar projects
- A proven yet customizable work plan to best accommodate the City's specific needs
- Quality assurance processes that incorporate City review and approval of all deliverables
- Built-in project management and change management best practices—focused on keeping the project on time, on budget, and progressing at a healthy pace
- An emphasis on conducting a participatory and inclusive process
- A focus on conducting a detailed, multifaceted assessment—considering organizational, operational, staffing, technological, strategic, policy and procedures, and service delivery aspects of the City and its departments

Figure 5 below presents an overview of our work plan intended to achieve the City's goals and objectives for this important initiative.

Figure 5: Work Plan Overview



Below and on the following pages, we provide details of our work plan to conduct the City's project effectively and efficiently as described in Figure 5.

Phase 1: Project Initiation, Planning, and Ongoing Management

1.1 Conduct initial project planning, a project kickoff meeting, and introductory meetings. We will work collaboratively with the City in initial project planning and in a project kickoff meeting to:

- Schedule and plan for a project kickoff meeting and introductory meetings with departmental staff
- Develop an agenda to guide introductory meetings
- Identify project milestones and expectations for the management and organizational assessment process
- Introduce key team members
- Clarify project goals and objectives
- Identify known project constraints
- Refine dates and/or tasks, as appropriate
- Identify surveys needed

We will discuss our approach for managing communications between BerryDunn and the City, as well as our approach to scope, risk, and resource management. We will also assist the City in identifying peer benchmarking organizations and stakeholders and/or stakeholder groups to include in the assessment process. Where appropriate, we will consider union relations in these identifying activities.

These discussions will help us to refine our currently proposed Project Work Plan and Schedule, as well as inform introductory meetings with departmental staff. Introductory meetings with departmental staff will be higher level in nature and share key elements of the process with the City's core internal stakeholders. These meetings will also serve as an opportunity for these individuals to ask questions and buy into the process early on. Ultimately, these preliminary activities will promote transparency and partnership in the process, as well as help ensure all insights and perspectives can be woven into the City's management and organizational assessment process.

1.2 Develop a Project Work Plan and Schedule. Based on the information gathered from our project kickoff meeting, as well as from those details enclosed in this proposal, we will develop a Project Work Plan and Schedule, which will outline the tasks and timelines for the review process. The Project Work Plan and Schedule will also include agreed-upon procedures between BerryDunn and the City related to project control, including quality management and deliverable submission/acceptance management. After providing draft versions of these materials in advance, we will facilitate a videoconference with the City's project team to review the drafts and solicit feedback. This videoconference will introduce the City's project team to our document review process and provide an opportunity for the City to share input on a critical step in the process. We will incorporate the City's feedback and finalize the documentation before distributing it in final form.

1.3 Develop communications and messaging. We will develop communications to build awareness regarding the review process, expected scope, and time frame; reiterate our commitment to inclusion and transparency; and clarify our approach to address out-of-scope issues that might arise. We will review messaging and communications with the City's project team before finalizing and working with the City's project team to distribute them.

▲ Deliverable 1 – Project Work Plan and Schedule

1.4 Conduct Biweekly Status Meetings. Our project manager, Shannon Flowers, will conduct Biweekly Status Meetings with the City's project manager on an ongoing basis throughout the project. We will use

Phase 1: Project Initiation, Planning, and Ongoing Management

these meetings to describe the activities and accomplishments for the reporting period; plans for the upcoming month; risks or issues encountered during the reporting period; and anticipated problems that might impact project deliverables. We will also use these meetings to highlight any work products and approaches that will contribute to deliverable development.

▲ Deliverable 2 – Biweekly Status Meetings

Phase 2: Current Environment: Data Collection and Analysis

2.1 Develop and administer an information request and review the results. We will provide the City's project team with an information request sheet for available documentation that will be helpful to us during the project. Examples include:

- Employee handbook and other employee publications and policies
- Standard operational procedures
- Organizational charts
- City and department operational and human capital strategies
- Any and all customer satisfaction and employee engagement surveys
- Service contracts
- Strategic planning documents for the organization and/or departments
- Operating and capital budgets and relevant budget request documents
- Standardized training plans
- Needs assessments
- Information related specifically to public safety such as patrol schedules, sector maps, and investigation chart(s)

These documents should not be created to fulfill this request; only existing documents would be needed. Once received, we will review this documentation to gain a foundational understanding of the City's current environment.

2.2 Develop and distribute culture assessment worksheets and surveys. We will develop and distribute worksheets and surveys specific to each department to assess the current cultural environment. Results will inform our understanding of current challenges and opportunities related to service provisions, business processes, staffing, training, succession planning, workload, use of time, and technology. Outcomes will be reviewed and documented to inform assessment and recommendations development effort.

2.3 Develop organizational communication. BerryDunn's commitment to supporting all stakeholders through change drives our standard approach to stakeholder messaging. We will draft organizational communication regarding process, expected scope, time frame, and commitment to inclusion and transparency at critical project junctures. We will review these communications with the City's project team before finalizing and distributing them.

2.4 Prepare for and conduct individual and internal group discussions. In preparation for interviews with the City's elected officials and leadership team, we will develop individual and small group question sets to guide discussions. These sets will be reviewed with the City's project team to solicit feedback before updating them to final form. Once complete, we will schedule and conduct key stakeholder meetings to inventory service delivery; programs; business processes and procedures; workforce management; technologies; training; employee engagement, relations, and retention; budget; decision-making processes;

Phase 2: Current Environment: Data Collection and Analysis

community engagement activities; risk management; DEI; social responsibility; US and State employment law and regulation compliance; and organizational effectiveness and development. We will use this inventory to identify gaps in services and/or areas in which departments or the City as a whole are unable to meet service level agreements, community needs, or other service demands. Outcomes of these meetings will be documented and used to inform the development of Current State Preliminary Recommendations for Staffing Model Analysis.

2.5 Review organizational structure. We will review the organizational structure at the City and departmental level, evaluating alignment and capacity to deliver appropriate levels of service against benchmarked organizations. Outcomes of the evaluation will be included in the Current State Preliminary Recommendations for Staffing Model Analysis.

2.6 Evaluate total cost of service. We will evaluate the total costs of service provision by department in terms of personnel and technology, develop a total cost of service delivery, explore alternative delivery methods, and opportunities for relative cost and value, such as utilizing outsourcing and leveraging technology. The goal is to assess ways in which to improve service levels, promote consistent data availability, comply legally, reduce time wasted, and enhance productivity. Outcomes of this evaluation will be included in the Current State Preliminary Recommendations for Staffing Model Analysis.

2.7 Develop Current State Analysis Memo. We will gather information developed from the evaluation of the City's requested focus areas and our review of documents and data to develop a Current State Analysis Memo. This Memo will summarize key information related to the effectiveness of the City and departmental management and organizational structure, service gap analysis, and the total cost of service provision. Once complete, we will view this memo with the City's project team to solicit feedback and confirm its contents. This session will help gain buy-in among City staff for the process and upcoming recommendations.

▲ Deliverable 3 – Current State Analysis Memo

Phase 3: Current State: Preliminary Recommendations for Staffing Model Analysis

3.1 Develop a Current State Preliminary Recommendations for Staffing Model Analysis. We will develop a Current State Preliminary Recommendations for Staffing Model Analysis that provides an assessment of organizational staffing, personnel distribution, service gap analysis, staffing, total cost of service provisions, and alternate methods of service delivery. We will also include key outcomes of the surveys, interviews, and stakeholder meetings. Once drafted, we will facilitate a work session with the City's project team to review the report and confirm the report's contents to generate consensus and buy-in. We will then hold a preliminary recommendations overview session with staff to encourage awareness, collaboration, and buy-in for potential changes and impacts on the organization.

▲ Deliverable 4 – Preliminary Recommendations for Staffing Model Analysis

3.2 Develop organization and department-specific communications regarding next steps. Following the work session with the City's project team and overview session with staff, we will draft our next organizational and department-specific communications regarding the Preliminary Recommendations for Staffing Model Analysis and outline next steps. We will review these communications with the City's project team before finalizing and distributing them.

Phase 4: Future State: Final Recommendations for Staffing Model Analysis and Implementation Planning

4.1 Develop a Future State Final Recommendations for Staffing Model Analysis. We will draft a Future State Final Recommendations for Staffing Model Analysis that highlights the positive aspects of the City's current staffing and service provision and includes objective recommendations supported by metrics and data to align with current best practices, industry standards, and the needs of the community. The report will include improvement opportunities to the City's organizational structure(s), processes, procedures, operational practices, and technology that would increase effectiveness, and efficiency and address identified gaps in service. Recommendations will consider departmental constraints, challenges, and available resources, as well as identify and recommend best practices for staffing ratios, performance measures, streamlining processes and procedures, potential cost savings related to technology initiatives, and training and succession planning. A recommendation for the optimal organizational model based upon available budget and resources will be presented within the report, as well as an executive summary. Our recommendations will be based on the results of the previous deliverables, best practices of organizations with healthy cultures, and consistent with the City's needs. We will review our recommendations with the City's project team to solicit and incorporate feedback before finalizing.

▲ Deliverable 5 – Final Recommendations for Staffing Model Analysis

4.2 Prepare a presentation for city officials. We will prepare for and facilitate a presentation of the Final Recommendations for Staffing Model Analysis to City officials. This will be an opportunity to solicit feedback, encourage engagement, and promote buy-in for key project stakeholders and City leadership.

▲ Deliverable 6 – Presentation of Findings and Recommendations

4.3 Develop organization and department-specific communications regarding Presentation of Findings and Recommendations. Following the presentation of the Final Recommendations for Staffing Model Analysis, we will draft our next organizational and department-specific communications regarding how the presentation went and next steps.

4.4 Develop an Implementation Planning Memo. We will develop an Implementation Planning Memo that prioritizes recommendations based on organizational needs and available resources. We will review the Implementation Planning Memo with the City's project team to solicit feedback before updating to final.

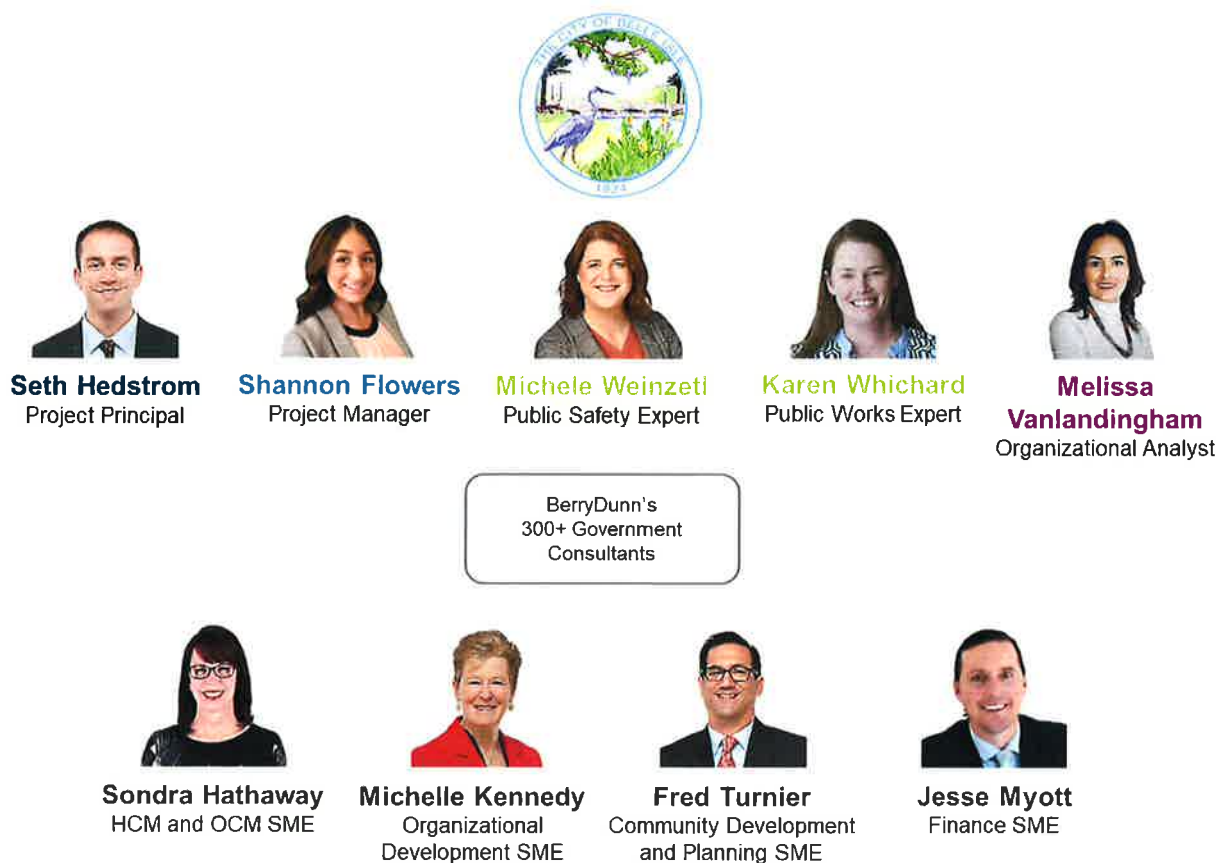
▲ Deliverable 7 – Implementation Planning Memo

4. Project Team

4.1 Organizational Structure

At BerryDunn, we believe in the synergy that accompanies a team approach. That said, we have carefully assembled a project team with unique and specialized qualifications that coincide with the needs and desired outcomes of the City. **These project team members will remain committed, available, and assigned to perform the City's requested work effort.** Figure 6 describes the organizational structure of our project team, followed by a listing of project staff. It should be noted we do not intend to subcontract any portion of the City's desired scope of work.

Figure 6: Organizational Structure



4.2 Roles, Responsibilities, and Qualifications

Below and on the following pages, we list our project team members' experience, qualifications, and expertise as it relates to projects of this nature and work with comparable public-sector clients. Our project team members' full resumes can be found in **Appendix A**.



Seth Hedstrom, PMP®, LSSGB | Project Principal

Seth is a principal and the leader our Local Government Practice Group. He brings extensive experience in project management and has managed more than 75 large scale technology and organizational development projects over the course of 14 years with

BerryDunn. Seth has led our clients through many of the complex decision points and issue-resolution processes typical of business process analysis and system selection projects, and he has facilitated focused review of business processes needing change. Through this work, he has provided business process improvement services for many clients, either as a standalone engagement or as part of a larger engagement. His experience includes documenting as-is business processes, benchmarking processes with similar organizations, introducing industry best practices, developing to-be business process recommendations, overseeing strategic planning, and conducting organizational assessments. Also notable is that Seth has served in a leadership role on nearly all BerryDunn's organizational development projects.

As the **project principal**, Seth will:

- Maintain overall responsibility for the services provided to the City
- Review and approve all deliverables in accordance with our quality assurance processes
- Help ensure the commitment of our firm and appropriate resource allocation



Shannon Flowers | Project Manager

Shannon is a senior consultant in our Local Government Practice Group and has been with BerryDunn for two years. She has more than 20 years of experience in local and state government; many of which have been spent in director, C-suite, and senior-level roles.

During that time, Shannon led a variety of teams through strategic operations planning and execution. Her experience engaging staff and stakeholders in the process has led to the development of plans that were met with broad ownership and acceptance. Her strong understanding of the business processes that support efficient operations gives her the insight necessary to establishing actionable and achievable objectives that move an organization forward and align strategic plans with budgets. Her clients benefit from her focus on change management and business process improvement as well as her experience training and leading staff through difficult transitions.

As the **project manager**, Shannon will:

- Work directly with the City and engage in managing the work
- Lead assessment, peer benchmarking, and recommendations development activities
- Participate in meetings with leadership
- Lead the development of project deliverables
- Perform day-to-day project oversight
- Deliver presentations and updates to the City's project team and leadership
- Develop and maintain the Project Work Plan and Schedule
- Optionally provide implementation support
- Facilitate interviews and information-gathering activities



Michele Weinzetl, Ed. D., Prosci® CCP | Public Safety Expert

Michele is a manager in our Local Government Practice Group. She has over 27 years of experience in the public sector. Her background includes more than 17 years as a chief of police for three different Minnesota police departments and several years serving as a subject matter expert, consultant, and adjunct faculty member for the International Association of Chiefs of Police (IACP) Leading by Legacy program. She has extensive experience conducting assessments of police officers and police executives in the areas of staff supervision, leadership development, organizational management, and policing skills.

As the **public safety expert**, Michele will:

- Lead project activities with the Police Department and its stakeholders
- Review the Police Department's organizational and departmental structures
- Support assessment and recommendations development activities as it relates to the current and potential future organizational environment of the Police Department
- Support the development of project deliverables



Karen Whichard | Public Works Expert

Karen is a senior consultant in our Local Government Practice Group and is a seasoned public sector leader with 19 years of experience in both small and large local governments. Her time with local government organizations ranges from working with a town of 15,000 residents to playing a key role for the City of Charlotte, which is home to nearly 900,000 residents. She boasts a significant track record of successfully building consensus, solving complex problems, and navigating diverse political environments to implement the policy vision of elected bodies.

As the **public works expert**, Karen will:

- Lead project activities with the Public Works Department and its stakeholders
- Review the Public Works Department's organizational and departmental structures
- Support assessment and recommendations development activities as it relates to the current and potential future organizational environment of the Public Works Department
- Support the development of project deliverables



Melissa Vanlandingham | Organizational Analyst

Melissa is a consultant in our Justice and Public Safety Practice and joins the firm after 15 years of experience with the Austin, Texas, Police Department. She began her career in dispatch and records maintenance for three years before advancing to analytics. As a crime analyst, Melissa compiled and analyzed Records Management System crime reports to understand potential causes of criminal activity, develop leads, and find links in crime by attributes specific to the crime. Each week, she organized data into crime types, call volume, response times, and call type allocation. Since 2015, Melissa has served as the Senior Criminal Intelligence Analyst in which she worked with qualitative and quantitative data for the purpose of analysis and intelligence gathering. She is an expert in translating data into meaningful outputs.

As the **organizational analyst**, Melissa will:

- Work directly with the City and participate in project efforts
- Review the City's organizational and departmental structures
- Participate in a cultural assessment
- Support assessment and recommendations development activities as it relates to the current and potential future organizational environment
- Support the development of project deliverables

Additional Resources

The City will also benefit from our broader team of more than 300 consultants. Our highly experienced resources representing specialty areas of all local government departments are listed on the following page.



Sondra Hathaway, MBA, Prosci® CCP | HCM and OCM Subject Matter Expert (SME)

Sondra is a senior consultant in our Local Government Practice Group with 20 years of public-sector experience in strategic human capital planning including organizational development, performance management, workforce planning and staffing, employee relations and engagement, and learning and development. Sondra has led strategic planning development at city and departmental levels, facilitated public engagement, implemented resident service improvement initiatives, presented at the Arizona City Manager's Association annual conference, instituted continuous improvement Lean philosophies and practices at multiple organizations, and was the founder of a community for municipal resource sharing. Sondra is a practitioner of ICA Technology of Participation® (ToP®) facilitation methodology.



Michelle Kennedy, Prosci® CCP, ODCC | Organizational Development SME

Michelle is a manager in our Local Government Practice Group and has been with BerryDunn for four years. She has more than 30 years of government-sector management and consulting experience. She is an expert in organizational development, including strategic and business planning, leadership development and executive coaching, organizational assessments, OCM, program evaluation, business process improvement, and performance measurement. Michelle has provided consulting services and project leadership for state and local government agencies throughout the United States. She is a strong facilitator and is certified in several related areas including in the ICA ToP® facilitation methodology. Michelle has facilitated the development and writing of strategic plans for 60 public-sector organizations. Further, Michelle is an Organization Development Certified Consultant from the Institute of Organization Development.



Fred Turnier, MPA, AICP, Prosci® CCP | Community Development and Planning SME

Fred is a manager in our Local Government Practice Group. He has more than 25 years of experience working with local government agencies and extensive experience assisting public-sector entities with project management and development services, business process improvement, fee and cost-recovery analysis, system design and implementation, and policy analysis and formation. He focuses in the areas of community development, planning, building, inspections, code enforcement, business licensing, housing and homeless issues, land management, utilities, and infrastructure planning.



Jesse Myott, MA | Finance SME

Jesse is a senior consultant in our Local Government Practice Group. He has nearly a decade of public-sector experience, focusing on supporting municipalities with operating and capital improvement budget development and management; special fund accounting, revenue and expenditure forecasting; customer valuation; and cost of revenue analyses for municipal programs and services. Jesse has led multiple cost of service and cost allocation projects for local governments from California to Massachusetts.

5. Cost Proposal

Our proposed fixed-fee services cost to complete the City's desired project is broken down by phase in Table 2. Our costs are based on our experience conducting projects of similar size and scope, and the assumption that satisfying a deliverable is based on the City's signed acceptance. That said, the City will not incur any additional costs associated with the process of reaching deliverable acceptance.

We will utilize our hybrid methodologies through collaborative planning with the City to limit travel expenses to the City as appropriate.

Table 2: Cost by Project Phase

Phase	Estimated Hours	Cost
Phase 1: Project Initiation, Planning, and Ongoing Management	48	\$10,600
Phase 2: Current Environment: Data Collection and Analysis	128	\$28,500
Phase 3: Current State: Preliminary Recommendations for Staffing Model Analysis	48	\$10,400
Phase 4: Future State: Final Recommendations for Staffing Model Analysis and Implementation Planning	56	\$11,600
Total Fixed-Fee Services Cost (excluding travel expense)	280	\$61,100
<i>Travel Expense Estimate Allocation*</i>	-	\$8,000

**We typically propose an estimated travel expense allocation recognizing the various preferences among our clients for the relative approach to in-person versus virtual meetings. Given the nature of this work, we expect all primary information gathering and deliverable review meetings to be in-person and account for this in the estimated allocation. We are happy to further discuss our approach to travel at the appropriate time.*

Anticipated City Support

Table 3 presents anticipated City involvement for associated planning purposes.

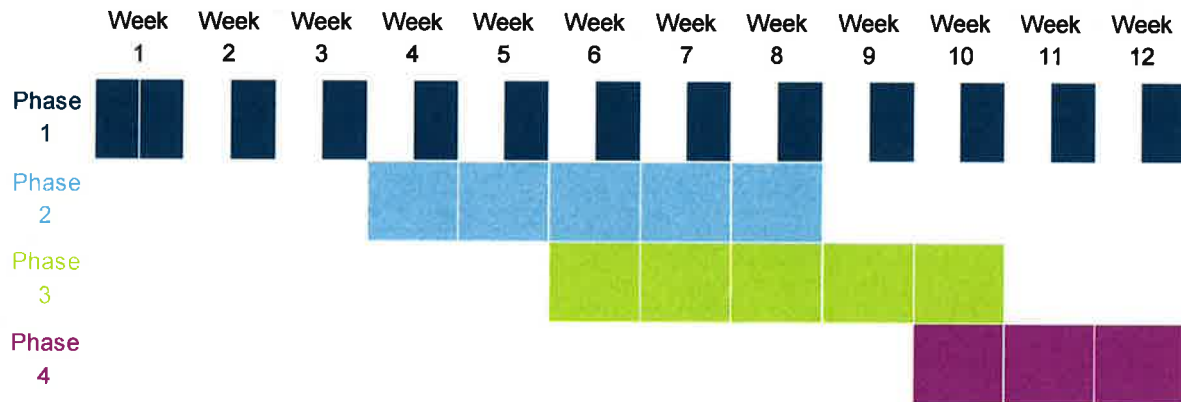
Table 3: Anticipated City Support

City Role	Tasks
City Leadership	<ul style="list-style-type: none"> • Provide support and sponsorship for the project • Participate in kickoff presentation • Participate individual or small group discussions, as appropriate • Provide feedback during Presentation of Findings and Recommendations meeting
Project Manager	<ul style="list-style-type: none"> • Maintain overall responsibility for the project

City Role	Tasks
	<ul style="list-style-type: none"> • Assist in collecting background documentation and coordinate with City staff • Participate in Project Team tasks as appropriate • Participate in Biweekly Project Status Meetings • Participate in kickoff presentation • Participate in the initial project planning meeting • Provide relevant requested documents and data • Review and approve the Project Work Plan and Schedule • Review organizational communications and messaging • Review web survey questions
Project Team	<ul style="list-style-type: none"> • Gather available documentation • Participate in kickoff presentation • Review individual and small group question sets • Provide feedback for the Preliminary Recommendations for Staffing Model Analysis • Provide feedback for the Final Recommendations for Staffing Model Analysis • Provide feedback on the Implementation Planning Memo • Participate in web survey(s) • Complete worksheets
City Staff	<ul style="list-style-type: none"> • Assist in information gathering • Participate in kickoff presentation • Participate in interviews

6. Proposed Timeline

Below, we highlight our proposed project schedule for the City's requested work effort. We are happy to adjust this schedule to best accommodate the City's needs, as appropriate.



7. Statement of Insurance



BERRDUN-03

HCTALBOT

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
4/25/2023

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Clark Insurance 1945 Congress Street, Bldg A PO Box 3543 Portland, ME 04104-3543		CONTACT NAME: Heather Caston-Talbot, AAI, CIIP, CIC PHONE (A/C, No, Ext): FAX (A/C, No): E-MAIL ADDRESS: hcaston-talbot@clarkinsurance.com	
		INSURER(S) AFFORDING COVERAGE	
		INSURER A: Hanover American	
		INSURER B: Massachusetts Bay	
		INSURER C: The Hanover Insurance Company	
		INSURER D: Maine Employers Mutual Ins Co	
		INSURER E: Travelers Property Casualty Co. of America	
		INSURER F:	

COVERAGES **CERTIFICATE NUMBER:** **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> ISO form CG 00 01 GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PROJECT <input checked="" type="checkbox"/> LOC OTHER:			ZZP D240054	4/30/2023	4/30/2024	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 1,000,000 MED EXP (Any one person) \$ 15,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COM/OP AGG \$ 2,000,000
B	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO OWNED AUTOS ONLY <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY			ADPD240058	4/30/2023	4/30/2024	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ Hired Auto P.D. \$ 50,000
C	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB CLAIMS-MADE DED <input checked="" type="checkbox"/> RETENTION \$ 0			UHP D240055	4/30/2023	4/30/2024	EACH OCCURRENCE \$ 8,000,000 AGGREGATE \$ 8,000,000
D	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N N	N/A	5101800149	1/1/2023	1/1/2024	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
E	Employee Theft			105608076	4/30/2023	4/30/2024	Limit \$ 5,000,000
E	Employee Theft			105608076	4/30/2023	4/30/2024	Of Client Prop Limit \$ 5,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
30 day notice of cancellation with 10 days notice for non-payment of premium, if required by written contract/agreement.

CERTIFICATE HOLDER

CANCELLATION

Berry Dunn McNeil & Parker
2211 Congress Street
Portland, ME 04102

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

Heather Caston-Talbot



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
04/01/2023

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an **ADDITIONAL INSURED**, the policy(ies) must have **ADDITIONAL INSURED** provisions or be endorsed. If **SUBROGATION IS WAIVED**, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Affinity Insurance Services 1100 Virginia Drive, Suite 250 Fort Washington, PA 19034	CONTACT NAME: Gretchen McCole	FAX (A/C, No):	
	PHONE (A/C, No, Ext): 215-773-4600	E-MAIL ADDRESS: gretchen.mccole@aon.com	
INSURED Berry, Dunn, McNeil & Parker, LLC 2211 Congress Street Portland, ME 04102	INSURER(S) AFFORDING COVERAGE		NAIC #
	INSURER A: Continental Casualty Company		20443
	INSURER B:		
	INSURER C:		
	INSURER D:		
	INSURER E:		
INSURER F:			

COVERAGES**CERTIFICATE NUMBER:****REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:						EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMPI/OP AGG \$ \$
	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS NON-OWNED AUTOS ONLY <input type="checkbox"/> HIRED AUTOS ONLY						COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	UMBRELLA LIAB <input type="checkbox"/> OCCUR EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED <input type="checkbox"/> RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$ \$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) <input type="checkbox"/> Y/N If yes, describe under DESCRIPTION OF OPERATIONS below						PER STATUTE <input type="checkbox"/> OTH-ER <input type="checkbox"/> E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
A	Professional Liability			APL-188112791	04/01/2023	04/01/2024	Per Claim/Aggregate Limit \$1,000,000 / \$1,000,000 Limits shown are as requested. SIR applies per policy terms and conditions.

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER**CANCELLATION**Berry Dunn McNeil & Parker, LLC
2211 Congress Street
Portland, ME 04102

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

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8. Forms

Attachment A. Non-Discrimination Affidavit

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: _____

Title: Seth Hedstrom, Principal

STATE OF MAINE

COUNTY OF Cumberland

Sworn to and subscribed before me this 4th day of May, 2023, by

Seth Hedstrom

Daphne Edwards
Signature of Notary Public

DAPHNE EDWARDS
NOTARY PUBLIC
State of Maine
My Commission Expires
January 5, 2030

☒ Personally known, or
☐ Produced Identification

Type of ID Produced: _____

Attachment B. Non-Debarment Affidavit

ATTACHMENT B

NON-DEBARMENT AFFIDAVIT

Page 1 of 2

Seth Hedstrom Being first duly sworn, deposes and says that:

He/She is Principal
of Berry, Dunn, McNeil & Parker, LLC 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: [Signature]

Print Name: Seth Hedstrom

Title: Principal

Date: May 4, 2023

STATE OF MAINE

COUNTY OF Cumberland

The foregoing Agreement was acknowledged before me this 4th day of May 2023 by, Seth Hedstrom

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 _____ as identification.

NOTARY'S SEAL: Daphne Edwards

NOTARY PUBLIC, STATE OF MAINE

DAPHNE EDWARDS
NOTARY PUBLIC
State of Maine
My Commission Expires
January 5, 2030

Daphne Edwards
Name of Acknowledger, typed, printed, or Stamped

Attachment C. Drug-Free Workplace Certification

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.

Berry, Dunn, McNeil & Parker, LLC
COMPANY NAME

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


VENDOR'S SIGNATURE

Attachment D. Non-Collusive Affidavit

ATTACHMENT D

NON-COLLUSIVE AFFIDAVIT

State of Maine

County of Cumberland

Seth Hedstrom being first duly sworn deposes and says that:

1. He/she is the Principal, (Owner, Partner, Officer, Representative, or Agent) of Berry, Dunn, McNeil & Parker, LLC 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: [Signature]

Title: Seth Hedstrom, Principal

Company: Berry, Dunn, McNeil & Parker, LLC

STATE OF MAINE

COUNTY OF Cumberland

Sworn to and subscribed before me this 4th day of May

2023,

by Seth Hedstrom

☒ Personally known, or
☐ Produced Identification

[Signature]
Signature of Notary Public

Type of ID Produced

DAPHNE EDWARDS
NOTARY PUBLIC
State of Maine
My Commission Expires
January 5, 2030

ATTACHMENT E

CERTIFICATION PURSUANT TO FLORIDA STATUTE § 287.135

I, Seth Hedstrom, Principal, on behalf of Berry, Dunn, McNeil & Parker, LLC
Print Name and Title Company Name
certify that Berry, Dunn, McNeil & Parker, LLC 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.

Berry, Dunn, McNeil & Parker, LLC

COMPANY NAME

Seth Hedstrom

PRINT NAME


SIGNATURE

Principal

TITLE

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

Appendix A. Resumes



Seth Hedstrom, PMP®, LSSGB

Principal

Seth is a principal and leads BerryDunn's Local Government Practice Group. He has more than 14 years of experience assisting public-sector clients.

His experience includes technology planning, organizational needs assessments, system planning and procurement, and the implementation of enterprise-wide information systems. Seth often serves in a leadership role on strategic planning projects and manages and oversees project progress and issue escalation and resolution with executive project sponsors.

Relevant Experience

Project Management: Seth has served in leadership on most of BerryDunn's local government strategic planning project. He also has managed system selection and IT strategic planning projects for some of BerryDunn's largest local government clients. He helps ensure projects are conducted in a high-quality manner, as well as stay on time and on budget.

Operational and Organizational Assessments: Seth has been involved in numerous operational and organizational assessment projects, which involve current environment analysis, future state planning, and the development of an implementation plan for incremental improvements over a multiyear planning horizon to align with client resources.

Business Process Improvement: Seth has provided business process improvement services for many BerryDunn clients, either as a standalone engagement or as part of an enterprise system selection. His experience includes documenting as-is business processes, benchmarking processes with similar organizations, introducing industry best practices, and developing to-be business process recommendations.

Select Clients:

Boulder County, CO
City of Cooper City, FL
City of Edgewater, CO
City of Ennis, TX
City of Groveland, FL
City of Lauderhill, FL
City of Menifee, CA
City of Milton, GA
City of New Braunfels, TX
City of Redlands, CA
City of Springfield, MO
City of St. Charles, IL
City of Washougal, WA
City of Wausau, WI
City of Westminster, CO
Collier County, FL
DuPage County, IL
Jefferson County, WA
Lake County, IL
Lancaster County, NE
Lane County, OR
Marquette County, MI
Monroe County, FL
Newton County, GA
Orange County, NC
San Diego Air Pollution Control District, CA
Weld County, CO

Education:

BS, Business Management,
Babson College

Project Management
Professional® (PMP®), Project
Management Institute®

Lean Six Sigma Green Belt
Certified

Diversity and Inclusion
Certificate, Cornell University

Membership/

Presentations:

Associate Member,
Government Finance Officers
Association



Shannon Flowers

Senior Consultant

Shannon is a senior consultant in our Local Government Practice Group. She is a finance professional with more than 20 years of experience, many of which have been spent in director, C-suite, and senior-level roles. Her expertise in budgeting, fiscal planning, cash flow analysis, and fiscal policy development is augmented by a strong understanding of the business processes that support efficient operations. As a consultant, her clients benefit from her focus in change management and business process improvement as well as her experience in training and leading staff through difficult transitions.

Relevant Experience

Organizational Assessments and Staffing Analyses: Shannon has in-depth experience evaluating organizational effectiveness, identifying gaps in service, and developing realistic plans for organization-wide transformation. Over the course of her career in local government, Shannon led and successfully implemented a variety of organizational assessments and transformation efforts. While in her role as the operations branch chief at the Colorado Department of Public Health and Environment, Shannon evaluated the efficiency and effectiveness of the services provided by the Disease Control and Environmental Epidemiology Branch. This evaluation included identifying gaps in service to the community, staffing capacity, time analyses, organizational culture, and the use of available technologies. The result of this evaluation was a re-alignment of staffing and improved technology use and process improvements to better meet community needs with existing resources. While at the Governor's Office of Information Technology, Shannon evaluated the impact of technology on state agency workforces and developed recommendations to increase efficiencies and support staffing requests. Shannon's experience and understanding of the dynamics involved in organizational assessments and their impact on people allows her to build awareness and buy-in from stakeholders throughout all transformations.

Process Improvement: In her role as operations branch chief for the Colorado Department of Public Health and Environment, Disease Control and Environmental Epidemiology Division, Shannon was the division authority for all fiscal, policy, procurement, and compliance matters. In this role, she led efforts in reviewing existing division processes, crafting recommendations for improvement, and implementing the recommendations. This required substantial change management expertise to encourage buy-in from division staff to assist

Select Clients

Boulder County, CO
City of Edgewater, CO
City of Fort Collins, CO
City of Frisco, TX
City of Greeley, CO
City of Gresham, OR
City of Helena, MT
City of Irvine, CA
City of Menifee, CA
City of Redding, CA
City of Redlands, CA
City of San Leandro, CA
City of Spokane Valley, WA
City of St. Charles, IL
City of Washougal, WA
City of Wheat Ridge, CO
Doña Ana County, NM
Lancaster County, NE
Maine Municipal Association
Marquette County, MI
Mesa County, CO
Pitkin County, CO
Weld County, CO

Education

MA, Global Finance, Trade and Economic Integration –
University of Denver

BA, Anthropology,
University of Colorado –
Denver

in the transition. Her role also involved administering an annual budget of over \$101 million that included a variety of funding sources, such as federal grants, state funds, and cash donations.

Strategic Planning: Shannon is an expert in strategic planning and helping local governments develop strategic plans that are actionable and supported by all stakeholders. Her expertise aligning strategic plans with budgets and developing implementation plans that make sense to diverse groups of stakeholders is rooted in her experience as a local government Finance Director. In that role, she helped her community develop a strategic plan that was representative of stakeholder needs and realistic in terms of available resources and staffing capacity. Shannon focuses on engaging all stakeholders, developing consensus, and aligning strategic plans with budgets. This focus results in strategic plans that can truly transform an organization and have meaningful, positive impacts on the community.



Michele Weinzetl, Ed.D, Prosci® CCP

Manager

Michele has over 27 years of experience in the public sector, specifically with police. She was chief of police for three different Minnesota police departments for 17 of those years. Michele has extensive experience instructing hundreds of police officers and police executives in the areas of supervision, leadership development, and a variety of policing skills. Michele also served as a subject matter expert, consultant and adjunct faculty member for the International Association of Chiefs of Police (IACP) Leading by Legacy program.

Relevant Experience

Chief of Police: Michele served as a chief of police for three different Minnesota police departments for 17 years. She is also the past President of the Minnesota Chiefs of Police Association.

International Association of Chiefs of Police: Michele served as a senior project manager for the IACP. She conducted several management study projects including: full operations and management; technical assistance; recruiting, hiring, and retention; and patrol and staffing.

IACP Leading by Legacy: Michele has served as a subject matter expert, consultant, and adjunct faculty member for the IACP Leading by Legacy program. She has instructed hundreds of police officers and police executives in the areas of supervision, leadership and development, and a variety of policing skills.

Publications: Michele is the author of *Acting Out – Outlining Specific Behaviors and Actions for Effective Leadership*. She has also written several journal articles and has presented at many conferences, including the IACP annual conference.

Select Clients:

Ann Arundel County, MD
City of Alexandria, VA
City of Albany, GA
City of Duluth, MN
City of Durham, NC
City of Little Rock, AR
City of Mansfield, CT
City of Memphis, TN
City of Norfolk, VA
City of Northglenn, CO
City of Westminster, CO
Cobb County GA
Glynn County, GA

Education:

Ed. D., Higher Education and
Adult Learning, Walden
University
MA, Organizational
Management, Concordia
University
BA, Organizational
Management, Concordia
University
AAS, Law Enforcement, North
Hennepin Community College
Prosci® Certified Change
Practitioner
Master Chief Law
Enforcement Officer
Certification



Karen Whichard

Senior Consultant

Karen is a senior consultant in our Local Government Practice Group and a seasoned public sector leader with 19 years of experience in both small and large local governments. Her time with local government organizations ranges from working with a town of 15,000 residents to playing a key role for the City of Charlotte which is home to nearly 900,000 residents. She boasts a significant track record of successfully building consensus, solving complex problems, and navigating diverse political environments to implement the policy vision of elected bodies.

Relevant Experience and Qualifications:

Organizational Assessments and Budget Planning: As a member of the City of Charlotte Strategy & Budget Department, Karen provided operating and capital budget oversight of approximately \$1 billion in operating and capital budgets for functions including housing and neighborhoods, code enforcement, solid waste collections and the City's water/sewer utility. This work included analyzing budgets and personnel requests for appropriate staffing levels, evaluating capital needs, benchmarking city services, and ensuring rates and fees were set to meet cost recovery targets. As Assistant Town Manager for Davidson, North Carolina, she managed the Town of Davidson's \$14 million public facilities project as well as \$17 million in general obligation bond projects for parks, greenways and transportation. Part of this work led to the Town of Davidson's first AAA bond rating.

Strategic Planning: During Karen's time as Assistant Town Manager of Davidson, she directed the creation and adoption of the 2020-2021 two-year strategic plan including managing the biennial town board retreat. While working for the City of Charlottesville, Karen served as the lead budget analyst for the Strategy and Budget department where she oversaw budgeting operations and the City's Environmental Focus Area Plan. She also assisted in the development of the City's Strategic Energy Action Plan.

Health and Human Services: As Assistant County Manager for Gaston County, Karen was a member of the Executive Leadership team where she rebuilt the relationship with a key community non-profit active in child welfare and foster care after years of challenges. She also implemented a change management program to improve workplace culture in the DSS child welfare division.

Water Utilities: As a member of the Charlotte Water Leadership Team, Karen managed external communications and performed varying levels of policy analysis and evaluation. She led a project that successfully rebranded the utility from CMUD to Charlotte Water. Karen also assisted the Director and Deputy Director in the implementation of key

Education

BA, Journalism and Mass Communication, University of North Carolina at Chapel Hill

Master of Public Administration, University of North Carolina Charlotte

programs such as biosolids crisis communications, coal ash, changes to rates and fees, interlocal agreements, and key regulatory requirements for the utility.



Melissa Vanlandingham

Consultant

Melissa is a consultant in our Public Safety Practice with 15 years of experience in law enforcement as an intelligence analyst, crime analyst, and dispatcher. She has extensive

experience working with qualitative and quantitative data for the purpose of analysis and intelligence gathering. A proactive self-starter, Melissa thrives when working on complex projects, managing concurrent objectives to promote efficiency and professionalism.

Relevant Experience

Criminal Intelligence: Melissa spent over 7 years working for the Austin Police Department as a Senior Criminal Intelligence Analyst. During this time, she was responsible for reviewing and analyzing cell phone records, providing case specific analysis for criminal events. She updated APD logs daily, documenting potential series or trends in robbery cases using MS Excel pivot table extractions. After comprehensive research into Organized Criminal Networks, Melissa developed specific target profiles and created organizational or group hierarchy link analysis charts utilizing i2 Analyst Notebook. She provided geospatial analysis for data pertaining to crime types or specific criminal activity through ArcGIS to produce accurate tactical and/or strategic intelligence maps that are provided to command staff for review and response.

Crime Analysis: Melissa spent four years as a Violent Crimes Analyst for the Austin Police Department. She read, compiled, and analyzed crime reports from the department's RMS to understand potential causes of criminal activity, develop leads, or find links in crimes by attributes specific to the crime in order to gain crime intelligence, provide crime reduction strategies, and potentially forecast criminal activity based on trend or series analysis. She studied crime data using ArcGIS software to identify crime trends, patterns, series, or hot spots to help formulate tactical deployment and strategic resources. Melissa was also responsible for daily export of calls for service for Charlie and Henry sectors from various departmental RMS sources (i.e. CAD Visinet, Versadex, IBM® Oracle Discoverer, and Qlik Sense), into MS Excel to clean and review in order to have a useable dataset for crime analysis in that specific area of the city for the week.

Select Clients

City of Charlotte-
Mecklenburg, NC
City of Boca Raton, FL
City of Urbana, IL
City of Waterbury, CT
City of Frisco, TX

Education

Bachelor of Science
Criminal Justice, St.
Edward's University