



Proposal
City of Breezy Point, Minnesota
Organizational Assessment
September 15, 2023

Erickson Northstar, L.L.C



Table of Contents

Our understanding of Breezy Point’s needs 1

Erickson Northstar, L.L.C. Qualifications2

Project Approach5

Task 1 Initiate and mobilize the project..... 5

Task 2 Explore 6

Task 3 Analyze 8

Task 4 Clarify..... 10

Tasks not Outlined in Deliverables 10

Project Team 11

Proposed Fees 13

Proposed Schedule 14

Project Management Measures 15



September 15, 2023

David Chanski
City Administrator
8319 County Road 11
Breezy Point, MN 56472

RE: Organizational Assessment Proposal

Dear Mr. Chanski:

Erickson Northstar, L.L.C. is thankful for the opportunity to share our qualifications to assist the City of Breezy Point (the City) with the completion of an organizational assessment of the City. Our consulting team has extensive hands-on and consulting knowledge and experience with local government organizational management and staffing analyses and practices and is ideally suited to furnish support to you in this important assignment.

Erickson Northstar, L.L.C. understands the City's needs

There are a number of consultants and consulting firms that possess the baseline competencies required to meet the specific technical requirements of this project. However, we believe the City is seeking more than just technical skills to realize your goals. We believe the City is seeking a collaborative relationship with an experienced consulting team who understands the challenges facing the City and who possess a solid background, experience, and knowledge assisting local governments with organizational and staffing analysis, and the preparation of a detailed operational improvement plan to assist the City in meeting the public services demands of its residents and businesses.

We offer the City of Breezy Point an experienced and highly qualified team of municipal government consultants with extensive experience working with elected officials, City staff and the citizens and business they serve to achieve the City's service delivery goals. Erickson Northstar is the right choice for the City because:

- **We have a highly- talented and experienced team of local government consulting specialists.** We can bring the City a highly skilled team possessing a sophisticated understanding of the multi-faceted functions required for an effective local government operation. Our consultant's experience is substantial, our knowledge is deep, and they bring a record of success in helping other similar organizations.
- **You will benefit from our extensive knowledge and hands-on experience in the analysis and improvement of local government management and operations.** The scope of work defined by the City requires a consulting team that understands how to optimize the staffing levels and service delivery functions of City operations and services that will be responsive to the citizens expectations today and in the future.
- **We will apply a proven process to analyze, compare, and advise the City on its staffing levels, organizational structure and service delivery tailored to meet your specific needs.** Over many years of assisting local governments improve organizational efficiencies, evaluate staffing needs, and improve their operations and processes we have developed and refined a proven process and framework methodology to guide both the City and the consulting team throughout the project.
- **We are local government specialists by choice.** We believe in the values of public service and have a deep and abiding respect for public servants. We understand the challenges well because our consulting team members have served as senior-level managers in local government before beginning their consulting careers. Their experience includes services as an elected mayor, finance director, city engineer, city administrator and city manager. Our consultants choose to work in the local public service sector because that is their passion.



In summary

Helping local governments succeed is not just our livelihood, it is our passion. Over our careers as both local government managers and consultants, each member of the Erickson Northstar team has built a record of success helping local governments improve their services across the United States. We are confident that a careful review of our proposal, the qualifications and experience of our team, and significant experience with similar organizations will provide the City with the confidence that the Erickson Northstar team is the best choice to assist you on this important engagement.

Erickson Northstar submits this proposal with the understanding that, if awarded, we will be afforded the opportunity to negotiate in good faith with the City to reach mutually agreeable terms and conditions prior to executing a final contract.

Should you have any questions or desire further information, please feel free to contact us at any time. Our team would consider it a professional and personal privilege to provide these services to the City of Breezy Point.

Sincerely,



Alan J. Erickson



Nicholas R. Dragisich

Erickson Northstar, LLC
8225 133rd Place,
Savage, MN 55378
(612) 799-0236
aandmerickson@gmail.com



Project Understanding

Our understanding of Breezy Point's needs

The City of Breezy Point is seeking a qualified consultant, highly experienced in conducting a staffing and operational assessment to identify the City's current and future human capital needs, service provisions, and organizational structure. The outcome of this study is to provide recommendations for current and future staffing needs, reorganization, and improvements in service delivery where warranted.

The study is driven by the city's past growth and projected future growth and its desire to maintain a high level of services for its residents and businesses both today and going forward. The outcome will provide recommendations and a plan to guide the City going forward.

The City's current organizational structure includes:

- Administration
 - City Administrator/Clerk (FT)
 - Assistant City Administrator (FT)
 - Deputy Clerk/Office Manager (FT)
 - Finance Specialist (FT)
 - Planner (PT Consultant)
 - Building Official (consultant as needed)
- Public Works
 - Public Works Supervisor (FT)
 - Assistant Public Works Supervisor (FT)
 - Public Works Worker (3 FT)
 - Seasonal Worker
- Police
 - Police Chief (FT)
 - Sergeant (FT)
 - Patrol Officer (5 FT)
 - Part-Time Officer (as needed)
 - Police Administrative Support (FT)

The City's anticipates a conservative growth rate of 3% annually which would result in an estimated 2030 population of approximately 3,500.

They have issued 12 new building permits year-to-date in 2023 (while an additional 3 are currently in review). Historical growth in housing units shows that between 2014 and 2022, 225 housing units were built which combined with the current new building would seem to place them on track to meet or exceed the 348 housing units by 2030 projected in their Comprehensive Plan. One thing to note is that, in addition to the new construction, there has been a transition of historically seasonal properties converting to full-time properties.

To meet these requirements, Erickson Northstar will provide a team of senior, experienced consultants with direct experience in organizational management, staffing analyses, and service delivery improvement. They will use a time-tested methodology to perform their analyses working in close collaboration with City staff and the City Council.



Qualifications

Erickson Northstar, L.L.C. Qualifications

Erickson Northstar is a recently formed consulting practice providing consulting services to local government across the United States. Our consultants bring a solid background of experience to our clients both as former local government managers and as consultants to local governments. Their experience includes service with Springsted Incorporated and with Baker Tilly, LLP. Our focus is providing local governments and not-for-profit organizations with high quality consulting services providing a balance of national perspective and local expertise.

Local governments are under a great amount of pressure to deliver high quality services in a fiscally constrained environment. The evolution of technology and the impacts of the pandemic have impacted residents and businesses expectations of service delivery resulting in traditional methods and means of service delivery no longer meeting expectations. This scenario is not likely to change at any time in the future. Elected officials and public administrators are under pressure to adapt and to employ new and innovative solutions that require progressive leadership, creative partnerships, cautious risk taking and an investment in their personnel and organizational foundation. There is a compelling need in the public sector to enhance and enrich their organization, their people, their processes, and their systems to deliver more value by maximizing the use of public resources in meeting the current and future need of their stakeholders to achieve more success in the marketplace of public opinion.

Erickson Northstar's consultants have extensive experience in advising local government and not-for-profit clients in organizational management and development. Our staff has direct experience in managing and leading local city and county governments. Our team of professionals brings practical, realistic, and creative solutions to the challenges faced by local government entities.

Over the past five years Erickson Northstar consultants individually have assisted approximately thirty local governments in nine states with organizational management and staffing studies. These local governments have ranged in population served from less than 5,000 to over 8 million.



Qualifications

Demonstrating successful relationships with similar clients

We encourage you to connect with the clients below to learn more about the quality of services our consultants have provided to them. Each client will offer a different perspective as you consider your own needs.

City of Big Lake, Minnesota			
Name	Hanna Klimmek	Title	City Administrator
Phone	+1 (763) 251-2979	Email	hklimmek@biglakemn.org
Services	Baker Tilly was engaged the City of Big Lake to perform a staffing analysis and market rate compensation comparison of its departments. The scope of the work included a visioning process with elected officials and department heads relative to the services to be provided by the City over the next ten years, the development of an organizational structure for City departments and a ten-year staffing plan for the City based on projected growth and development. The outcome of the study provided the City of Big Lake with a strategic direction for the future operation and staffing of City departments going forward. Nick Dragisich was the lead consultant on this project for Baker Tilly.		
City of Chaska, Minnesota			
Name	Matt Podhradsky	Title	City Administrator
Phone	+1 (952) 448-9200	Email	MPodhradsky@chaskamn.com
Services	The City of Chaska engaged Springsted Incorporated to conduct a staffing analysis study to assess the current staffing levels in City departments and to determine how future population and business growth in the City will affect the demand for increased service and consequently, the need for staff resources. The outcome of this provided a strategic direction for staffing and service delivery through 2035. Nick Dragisich was the lead consultant on this project for Springsted Incorporated.		
City of Hermantown, Minnesota			
Name	John Mulder	Title	City Administrator
Phone	+1 (218) 729-3600	Email	jmulder@hermantownmn.com.gov
Services	Baker Tilly US, LLP was engaged by the City of Hermantown, Minnesota to perform an organizational management and staffing analysis of its City Departments excluding Public Safety (Police and Fire). The scope of the study included conducting a review of business processes and operations, a review of the organizational structure of the city overall and of each department, an analysis of staffing levels and needs. The study outcome provided recommendations for organizational structure, staffing levels, operational improvement, and increased efficiencies.		



Qualifications

City of Eagan, Minnesota			
Name	Gene Van Overbeke	Title	Director of Administrative Services (Retired)
Phone	+1 (651) 233-6949	Email	gjvanoverbeke@gmail.com
Services	The City of Eagan engaged Alan Erickson to conduct a review of the organization of the Administrative Services Department. In particular the City asked Mr. Erickson to review and propose how the department should be configured in the near term considering the recent departure of a department employee. Additionally, a further desire of the engagement was to propose a department configuration in the longer term as the department director and other key City leaders considered retirement. The study as completed was used to make strategic changes to department staffing in both the short and long term.		

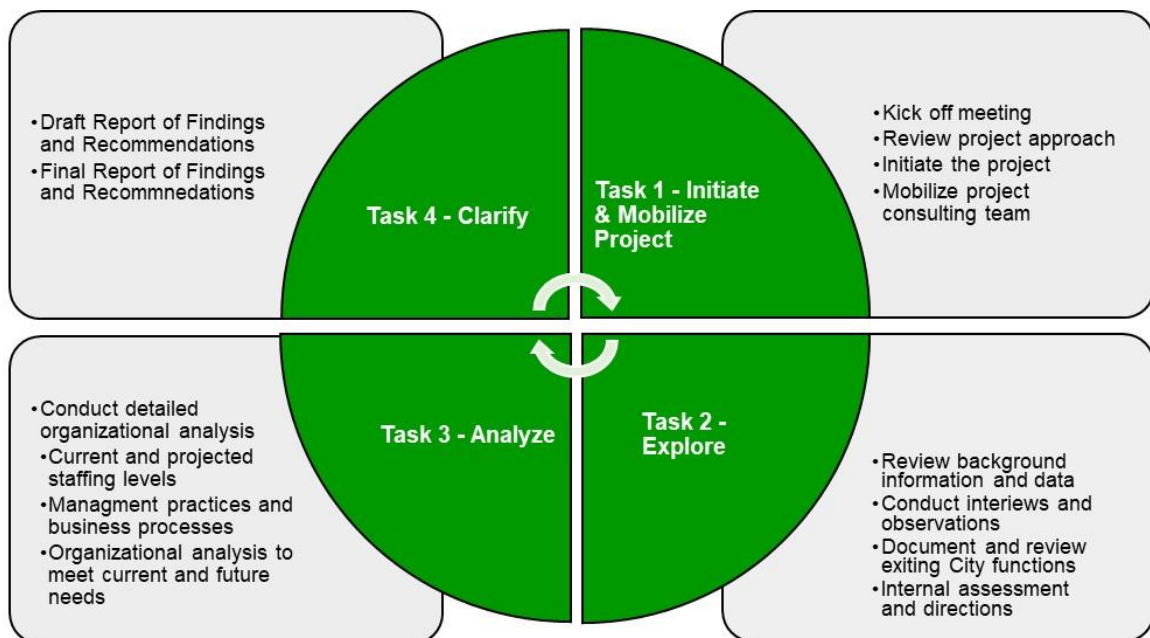


Project Approach

Erickson Northstar, LLC's staff's expertise in local government management, nationwide consulting expertise and extensive consulting experience make our firm the natural choice to perform your staffing model analysis.

Project Plan

To fully meet the City of Breezy Point's needs in this organizational assessment Erickson Northstar will complete a detailed scope of work to address the project deliverables, outcomes and expectations detailed in the City's Request for Proposals. Our approach to this project is shown in the process diagram below and described in detail in the tasks, and subtasks that follow.



Task 1 *Initiate and mobilize the project*

This task includes identifying a process to develop a mutual understanding of the project scope, objectives, deliverables, and timing as well as ensuring that appropriate City and consultant resources are available and well-coordinated.

Task 1.1 **Review project approach**

- Review the project approach and tasks to identify and confirm major work steps, timelines, milestones, and resource assignments.
- Present the agenda and other briefing materials for project initiation/ "kickoff" activities.

Task 1.2 – **Initiate the project**

- Meet with the City's project team to commence the project and review the overall objectives, scope, schedule, and work products to be delivered.



Project Approach

- Establish points of contact and project reporting structure.
- Establish a partnership between the Erickson Northstar project team and their City of Breezy Point counterparts to gain a commitment for the project.
- Review the project communication plan, status reporting, and control procedures to be used.
- Discuss and develop an agreement on key drivers of the required level of effort, including:
 - Processes to be used in completing the scope of the project
 - Internal interview participants
 - Elected official involvement
 - Project management and status reporting frequencies and protocols
- Finalize the project scope, work plan, and schedule.

Task 1.3 – Mobilize project consulting team

- Brief the project team on the project plan and expectations.
- Prepare and deliver an initial data request including such items as:
 - Ordinances goals, objectives, policies, performance standards, and measures related to the operation of City Departments
 - Strategic Plan
 - Comprehensive plan
 - Community demographic and population growth projections
 - Current and three prior years budgets and staffing authorizations for all City departments
 - City and departmental organization charts
 - Position descriptions and functional assignments for city staff
 - List of any services outsourced and when the outsourcing started
 - Three-year history of workload volumes for each department:
- Operating statistics
- Listing and documentation of current automated systems and technology supporting the operation of City Departments
- Any prior reports and other in-house or independently prepared audits, performance reviews, or management studies of City Departments

Task 2 Explore

The Erickson Northstar team will use its local government experience, knowledge, and skill to discover and gain an understanding of the current state of the City’s overall and each department’s, services, organizational structure, workload and staffing, business processes and technology. Techniques used will include review of City-provided data, local government research, interviews, and others. This phase represents the primary data collection component of the methodology.

Task 2.1 – Review background documents and data

- Review provided background data and documentation to develop an initial understanding of each City Department’s services provided, workload, organizational structure, staffing, job responsibilities of each position, goals, objectives, and results.

Task 2.2 – Conduct interviews and observations

- The consulting team will undertake individual interviews with the Mayor and City Council members to gain an understanding of their collective vision and service expectations for the City and its departments.



Project Approach

- Individual interviews will be conducted with following full-time City staff: City Administrator/Clerk, Assistant City Administrator, Deputy Clerk/Office Manager, Finance Specialist, Public Works Supervisor, Assistant Public Works Supervisor, Police Chief, Police Sergeant, Police Administrative Support and with the Planner consultant and the Building Official consultant to gain an understanding of the current organizational structure, operations, business processes, technology, areas of concern, the roles and responsibilities of each, and projected future service demands. In addition, we will collect detailed data and information regarding organizational structure, service levels, staffing and operations. We will use several different techniques for obtaining this information; we will collect sufficient information to be able to identify the current state in each department and in the City overall. Interview topics may include such items as:
 - Organizational structure
 - Staffing levels and turnover
 - Duties and responsibilities of staff
 - Principal business practices and processes
 - Service and service levels provided
 - Available resources
 - Supporting technologies
 - Operational strengths and weaknesses
 - Staff training
 - Contracted services
 - Issues, constraints, and opportunities for improvement
 - Communications both internal and external
- We will conduct an employee focus group session with the staff in Public Works and one with the Police Patrol Officers to gain an understanding of the current operations from the City employees and to provide them with an opportunity to be part of the process.

Task 2.3 – Document and review existing City functions

- With the information from the prior tasks, the consultant team will analyze the information collected and develop a profile of the City that will include the following distinct but interactive steps:
 - Review the information obtained through interviews and focus groups and organize by issue.
 - Analyze the information to identify omissions or inconsistencies and collect additional information, as needed.
 - Evaluate existing operations, staffing levels, organizational structure, processes, practices and principles, and service delivery against generally accepted best practices and principles of similar service providing operations. The analysis process will include "brainstorming" sessions among our team to take full advantage of the experience and perspective of each consultant. A profile will be developed containing the following:
 - The organization, staffing and reporting relationships of staff in each Department
 - The objectives, priorities, and programs of each Department
 - To the extent available, the current workload and workload trend information
 - The services and service levels provided by staff in each department
 - Supporting technologies
 - The communication and workflow between staff internally within each department and between departments
 - Use of outside vendors to provide services



Project Approach

- The profile will document the current organization, staffing, workload, and management practices of the City Departments. The profile will be reviewed via Teams with the City Administrator and appropriate staff. Based on this review, the profile will be amended as appropriate and will be included in the final report.

Task 2.4 – Internal assessment and directions

- Concurrent with the previous task, the consultant team will develop initial observations and findings including:
 - Is the organizational structure of the City and its departments logical and organized to maximize efficiency and effectiveness?
 - Is the organizational structure flexible and able to respond effectively to changes in service demand?
 - Are there an adequate mix of staff skill sets and capabilities to handle the work effectively?
 - Are the roles and responsibilities of the staff clearly established and accepted?
 - Are there efficiencies or improvements that can be achieved through the consolidation of processes, job duties, the elimination of redundancies, etc.?
 - Are there functions that should be centralized and/or standardized?
 - Identification of any specialties
 - Internal and external communications
 - Are there opportunities for interdivisional cooperation and cooperation between other departments?
 - Is the current use of outside vendors to provide services more efficient and effective than providing these services internally?
 - Is there any formalized back-up or cross-training in place?
 - Are there areas where responsibility/accountability does not exist or where it is unclear where the responsibility/accountability lies?
 - Does staff perform any unnecessary work?
 - Are there any duplication of effort and non-value-added activities present?
 - Is there a structured process for objective-setting, priority-setting, and service delivery planning and, if so, is it effective?
 - Are staffing levels and workload demands in balance?
 - Is there a talent management program in place and is it effective?
 - Are exit interviews conducted with staff who voluntarily leave management and administration positions?
 - Is there a succession plan in place and is it up to date?
 - How is technology used and are there areas where technology use can be improved?
 - The performance measures currently in use and how they are applied to improve operations year-to-year
 - Other opportunities that are identified through interviews, feedback or other research
- As with the factual profile, the initial assessment will be reviewed with the City Administrator and other staff as appropriate via Teams and revised for inclusion in the final report.

Task 3 Analyze

In this task the consulting team will develop and critically analyze alternate scenarios for organizational realignment and business improvements, applying multiple techniques at an appropriate level of detail based on our findings and results.



Project Approach

Task 3.1 – Conduct detailed organizational analysis

- The detailed analysis phase will form the key part of our review process and recommendations for improvement. These will include specific recommendations for organizational improvement. An analysis of current and projected City department staffing levels will be performed including:
 - Workload and staffing:
 - Service level standards
 - General workloads and trends
 - Future service and staffing demands
 - Resource and staff utilization
 - Optimal staffing levels necessary for City operations to meet public service demands through 2030 and the rationale for the staffing
 - Talent management
 - Turnover rate and exit interview analysis
 - Recruitment and retention practices
 - Succession planning
 - Formalized back up and cross-training of staff
 - Strategic alignment opportunities:
 - Efficiencies that can be achieved through the strategic alignment of functions and/or through consolidation of services, processes, job duties, the elimination of redundancies, etc.
 - New or re-aligned positions
 - Opportunities for cooperation, standardization, centralization within each department and with other City departments
- Management practices and business processes:
 - Strategic and operational planning
 - Benchmarks and performance measures
 - Application of technology in operations and customer service
 - Adoption of best practices
 - Process improvement opportunities
 - Gap analysis:
 - Identify opportunities for operational improvements and/or business process redesign to move from the current state to the desired future state
 - Identify training needs
- Organization analysis to meet current and future needs:
 - Organization structure
 - Reporting relationships
 - Working relationships
 - Management/supervisory spans of control
 - Communications both internal and external
 - Decision making
 - Operating policies and procedures
- Prepare a summary of initial observations, findings and preliminary recommendations and prioritized options in order of importance
- Review summary with the City Administrator and appropriate staff.



Project Approach

Task 4 Clarify

The consulting team will incorporate the information and knowledge acquired to this point in the project to enable the City to efficiently serve the needs and expectations of the City and its residents.

Task 4.1 – Prepare a draft report of findings and recommendations

- We will prepare a Draft Report of Findings and Recommendations which will include the consulting team’s findings and conclusions and will include:
 - Implementation action plans for both short-term and long-range components and identify responsible parties who can be tasked with integrating recommended changes
 - Implementation action plans for any recommended reorganizations and/or service delivery improvements
 - Estimated savings or costs of implementation for each recommendation
 - Recommended implementation timetable
- We will provide the City with a copy of the Draft Report in PDF format
- We will review the Draft Report of Findings and Recommendations with the City Administrator and appropriate staff via Teams

Task 4.2 – Complete additional data collection and analysis as required

- If necessary, perform additional data collection and analysis based on the review and feedback provided during the review of the draft report

Task 4.3 – Prepare and present a Final Report of Findings and Recommendations

- We will deliver a copy of the Final Report to the City in PDF format.
- We will formally present the Final Report of Findings and Recommendations in a meeting selected by the City.

Tasks not Outlined in Deliverables

Task 3.2– Research best practices

- Identify comparable agencies from which to gather benchmark data and best practices and innovation
- Develop a survey instrument to be used in gathering data from comparable organizations
 - Develop a list of staffing benchmarks to be used for comparing staffing levels
 - Develop a list of operational and performance benchmarks, and key performance indicators
 - Review survey instrument and list of comparable agencies with the City Administrator and other appropriate staff
- Conduct and document the survey of comparable organizations
 - Compile results of the survey
 - Gather data relative to national best practices and benchmarks
 - Gather data from consulting team’s extensive experience in best practices and benchmarks
- Compile data and document best practices and innovations
 - Develop comparative benchmarks incorporating survey results, national benchmark data, and consulting team experience



Project Team

Project Team

The Erickson Northstar consulting team is comprised of seasoned professionals who offer a collaborative approach to this project and who bring a depth of experience and understanding of the City's needs in this study. Engagement team members are introduced below.

Nicholas R Dragisich, P.E. – Project Lead



Nick Dragisich has more than 30 years of management experience. He has been directly responsible for or involved in numerous organizational management studies, staffing analyses, strategic planning studies, long-range financial planning, utility rate and cost analysis studies, capital improvement planning, growth and fiscal impact studies, impact fee studies, debt management, as well as in the development of Excel®-based computer models for clients in California, Illinois, Indiana, Iowa, Kansas, Louisiana, Maryland, Minnesota, Montana, Missouri, Nebraska, New York, North Carolina, North Dakota, South Carolina, Tennessee, Texas, Utah, Virginia, Washington and Wisconsin.

Relevant experience

- Lead the management consulting services practice for Springsted Incorporated and served as a Managing Director for Baker Tilly, LLP in its management consulting practice.
- Served as a city administrator, assistant city manager and city engineer where he managed a staff of up to 1,000 employees and fourteen departments.
- More than 30 years of experience in engineering
- Served as a project engineer for a private firm.
- Managed the design and construction of projects for municipal and private sector clients
- Has been a speaker at state and national conferences on utility rates, long-range financial planning, strategic planning, and organizational management
- Guest lecturer at the University of Minnesota Department of Civil Engineering on how cities finance capital assets
- Served as an elected Mayor

Education

Master of Business Administration
University of St. Thomas (Saint Paul, Minnesota)

Bachelor of Science Civil Engineering
University of Minnesota – Minneapolis

Registered Professional Engineer in Minnesota and Washington

Industry Involvement:

- International City/County Management Association (ICMA)
- American Society of Civil Engineers (ASCE)
- American Public Works Association (APWA)
- Central States Water Environment Association (CSWEA)
- Water Environment Federation (WEF)
- American Water Works Association (AWWA)

Current Community Involvement

- Member of the Architectural Review Committee of local homeowners' association



Project Team

Alan J. Erickson - Consultant



Al Erickson has over 40 years of financial, management and consulting experience. During his career he has worked extensively with cities, counties and various not-for-profit organizations assisting them in the areas of financial sustainability, operational and management excellence, and long-term trend analysis. Al's experience in both hands-on management and operational leadership as well as consulting allows him to ask the questions that need to be asked in order to help leadership face their current reality and execute their plans for a successful future.

Relevant Experience

- Executive Vice President for Springsted Incorporated leading the analytical and debt management operations areas while also serving as lead consultant for many client engagements.
- Served as Director of Finance and Administrative Service and Deputy City Manager for the sixth largest city in Minnesota.
- Simultaneously served as Managing Director (CEO) of two consulting firms which worked with not-for-profits in the areas of strategic financial and operational management planning. While there, spearheaded the development and implementation of various proprietary multi-variable models which assessed the financial viability of client operations.
- Has consulted with cities, counties, and not-for-profit clients in more than a dozen different states.
- Has been a speaker on various governmental finance topics both locally and nationally.
- Guest lecturer at Hamline University (Minnesota) graduate program in public administration.

Education

Master of Business Administration

University of St. Thomas (St. Paul, Minnesota)

Bachelor of Arts, Economics and Business Administration

St. John's University (Collegeville, Minnesota)

Industry Involvement:

- Government Finance Officers Association (GFOA)
 - Former Vice Chair of Debt Management Committee
 - Former Member of economic Development Committee
- Minnesota Government Finance Officers Association (MGFOA)
 - Past President

Awards:

- Thomas J. Moran Award. Presented by the MNGFOA for outstanding service rendered to advance the quality of public financial administration.

Current Community Involvement

- Member of City of Savage, Minnesota Economic Development Commission
- Audit Committee member Order of Saint Benedict Collegeville, Minnesota
- Vice President of local homeowners' association



Proposed Fees

Proposed Fees

Erickson Northstar will perform all tasks delineated in this proposal for a professional fee of \$22,950 which includes all direct and indirect costs to complete the project as described in this proposal. A detailed breakdown of these costs is provided in the table below. We will submit monthly progress invoices to the City of Breezy Point for work completed.

Task	Nick Dragisich Estimated Hours	Alan Erickson Estimated Hours	Fees
Task 1	10.0	10.0	\$ 2,850
Task 2	28.0	28.0	\$ 8,400
Task 3	18.0	18.0	\$ 5,250
Task 4	22.0	22.0	\$ 6,450
TOTAL HOURS & FEES	78.0	78.0	\$22,950

The proposed fee for Alternative Option Task 3.2 Research best practices would be \$2,400

Additional work

Should the City of Breezy Point request and authorize additional work outside the scope of services described in our proposal we would invoice the City at either our standard hourly fee of \$150.00 plus any related out-of-pocket costs or at an agreed-upon fee based on the additional scope requested. Additional work includes work outside the scope of services as described in this proposal including, but not limited to:

- Work related to a special request
- Additional on-site meetings or presentations
- Additional interviews

Negotiation

This proposal is submitted with the understanding that Erickson Northstar will be afforded an opportunity to negotiate a contract with mutually acceptable terms and conditions.

Assumptions

We based our proposed fees on the assumptions detailed below. Should any of these change during the engagement, we will bring the matter to the City's and discuss any impact on the project budget.

- The City leadership is fully committed to the success of this project
- The City recognizes that the services provided are advisory in nature only and that the City will assume full responsibility for implementation decisions
- Erickson Northstar will have access to, and be provided with, electronic or other readily available data without the need to conduct data extraction or comprehensive synthesis
- The City will assign a designated project manager to provide overall executive guidance and direction to Erickson Northstar.
- The project schedule is dependent upon the availability of City personnel and elected officials to participate in interviews, focus groups, deliverable reviews, etc.



Proposed Schedule

Proposed Schedule

Erickson Northstar has the resources to begin your project within ten days of receiving the notice to proceed. We will complete the project within ten weeks provided that all necessary information is made available to us in a timely manner and that City staff are available for meetings as needed according to the approved schedule. Assuming we receive the notice to proceed by October 13, 2023, we would complete the study no later than January 12, 2024, which includes consideration of the holidays during this time period.

Below is a tentative timeline based on our experience with previous studies conducted for similar local governments. If we are selected for this project, we will collaborate with City to confirm the project schedule.

ACTIVITY	2023			2024
	October	November	December	January
Task 1 Initiate and mobilize the project	■ ■			
Task 2 Explore		■ ■ ■		
Task 3 Analyze			■ ■ ■	
Task 4 Clarify				■ ■ ■ ■

MILESTONE	DATE
• Initiate and mobilize project	October 31, 2023
• Conduct interviews and observations	October 31, 2023
• Document existing findings	November 10, 2023
• Internal assessment and direction	November 17, 2023
• Conduct detailed organizational analysis	December 15, 2023
• Prepare a draft report of findings and recommendations	December 22, 2023
• Complete additional data collection and analysis as required	December 31, 2023
• Prepare and present a Final Report of Findings and Recommendations	January 12, 2024



Proposed Schedule

Project Management Measures

The Erickson Northstar team consists of seasoned professionals who have a long track record of delivering projects on time, within budget and in accordance with applicable laws, policies, standards, and good management practices. Our project management process includes the following:

- Nick Dragsich will be the project lead and will plan and direct all project related activities, manage the project schedule and deliverables
- Our team works closely together with each member having a clearly defined role and responsibilities. Our close working relationship provides for open communication and interaction.
- Our project approach is clearly defined, and our schedule and milestones are derived from our experience with similar project we have successfully completed
- Our approach includes a number of intermediate deliverables and meetings which enables the city to monitor the progress of the project
- Our quality control provides for each consultants work to be reviewed independently by another consultant so that no deliverables go to the client without first going through a thorough internal review
- Our proposed fees for this project are lump sum eliminating any potential cost overruns for the scope of services as proposed

