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600 Airport Rd  
Lakewood, NJ 08701-5995

September 15, 2023

Dear David Chanski:

We are pleased to propose a solution for the City of Breezy Point's Organizational Assessment. We have received, read, and accepted RFP 9511. We understand the specific challenges of a growing community and understand deeply what accommodations are required. We have extensive organizational assessment expertise and are prepared to be your consultant for this project.

We understand that you wish to strengthen your organization to better support your community. We bring local knowledge, subject matter expertise, and a range of well-adapted tools to perform this organizational assessment. We have conducted such assessments for more than 30 years and we understand incumbent challenges.

As President of Public Knowledge® (PK), I am authorized to submit this response and to make representations. Lamar Smith is the Vice President supporting this project, and you may contact him for further information or clarification of this response at [lsmith@pubknow.com](mailto:lsmith@pubknow.com) or (678) 539-0815. Melissa Murphy is our proposed project manager and will serve as your primary point of contact for the duration of the project.

Our response to RFP 9511 and pricing are valid for 60 days. In submitting this response, PK accepts all terms and conditions. We certify that we meet all minimum qualifications, and that we are capable, willing, and able to perform the services described within the required timeframe. We look forward to working with you on the Organizational Assessment project.

Sincerely,

Stacey Moss  
President



## Organizational Assessment

Proposal to: The City of Breezy Point, Minnesota

In Response to: RFP 9511

Due: September 15, 2023



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# 1 Executive Summary

The City of Breezy Point is seeking proposals for a qualified consultant to conduct an assessment on the organization to identify the City's immediate and future human capital needs. Such an assessment should include but not be limited to:

- Analysis of current staffing levels
- Analysis of current service provisions
- Analysis of future projects' impact on staffing levels and service provisions
- Recommendations for immediate and future staffing needs
- Recommendations for reorganization
- Recommendations for service delivery improvements

Include a narrative that describes the responder's understanding of the project, goals, objectives, and any known challenges to be overcome.

The City of Breezy Point is experiencing significant and rapid growth, and it is essential to prepare for the community's needs. With more people and businesses moving in, you want to organize departments and agencies to keep up with the demand. You need a partner to conduct an organizational assessment of your administrative structure to determine what is working well and what needs improvement.

We recognize the challenges of accommodating a rapidly growing population, including service delivery, infrastructure and housing availability, zoning and land use, cultural and social integration, and financial disparities. We want to help you create an efficient and flexible administration that can handle the challenges of growth, ensuring that your residents continue to enjoy a high quality of life.

Over the years, Public Knowledge® (PK) has grown and expanded into a larger organization. As a result, we have gained a deeper understanding of the challenges that come with managing a growing community. To ensure that we are well-equipped to handle these challenges, we have conducted a series of comprehensive internal organizational assessments to optimize our processes and systems for success. We are excited to share this expertise and our project experience with you.

We understand that every organization is unique, and we look forward to collaborating with you to identify areas where process improvements are needed. Our comprehensive assessment will consider your organization's size, structure, and goals, and we will work closely with your staff to recommend practical and sustainable changes.

Your staff and community are fortunate to be led by an administration that cares deeply about its future, and we are committed to helping you achieve your goals and thrive in the years ahead.



## 2 Our Approach

### 2.1 Organizational Assessment Methodology

PK’s standard organizational assessment methodology includes eight steps, illustrated in the figure below. We will work with the City of Breezy Point team using this methodology to provide the high-quality organizational review and assessment required.

Figure 1. PK’s Organizational Assessment Methodology

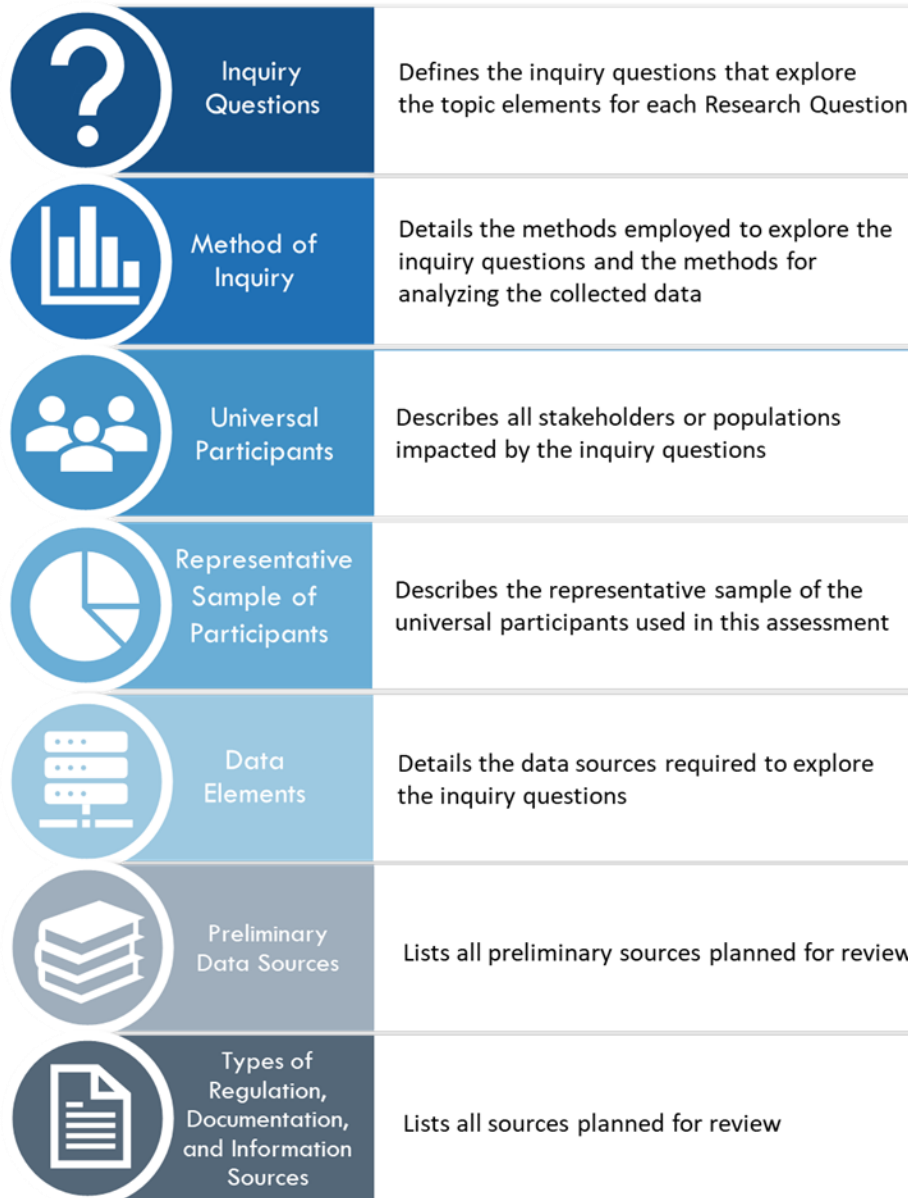


**Establish the Assessment Scope.** We approach establishing the scope of the organizational assessment by developing research questions to be answered in the assessment process. We will meet with your team to understand which factors should be assessed, including your staffing levels, service provisions, and the impact of future projects on the City of Breezy Point staff and provisions. We will work with you to curate research questions that will correctly guide us in assessing your organization.

**Establish the Inquiry Protocol.** Once research questions are developed, we will establish the Seven-Element Inquiry Protocol. The Seven-Element Protocol aims to ensure an understanding of the strategies, tools, and techniques the review team will employ to conduct a comprehensive assessment. The seven protocol elements are included for each selected research question below:



Figure 2. Protocol Elements



**Collect Data.** Once we have worked with you to establish the scope and inquiry protocol, we begin collecting data. This process includes gathering qualitative data from various sources, which include:

- **Interviews.** We will conduct individual interviews with key members of the City of Breezy point to gather their perspectives on staffing, service provisions, and any concerns or anticipated risks.
- **Focus Groups.** We will also conduct focus group sessions. One team member asks questions according to the focus group protocol, and the other records responses. The team records notes, aggregates the data, and identifies and analyzes themes.



- **Surveys.** Our team will administer online surveys to collect information from various members of the City of Breezy Point administration. The surveys include both quantitative and qualitative data. We will share draft survey questions with you to ensure that the survey methodology respects access to the survey tool and cultural sensitivity and employs the most effective method of gathering information for each member. Our review team will use common industry standards and non-clinical human subject review guidelines for data collection activities.
- **Document Review.** Finally, we will review relevant documents, such as policies, procedures, and regulations, to research progress toward meeting goals.

Quantitative data is also gathered from various sources, including internal reports, previous organization assessments (if relevant), and other sources.

**Establish Variables and Assumptions.** PK will establish variables and assumptions that may affect the outcomes of the analyses. Variables include factors that may explain discrepancies in data or research. For instance, data collected from other sources is only as accurate as the data received from the sources. Our teams also make assumptions about the data, including that it is the most current and accurate available and that participants share information to inform the assessment as accurately as possible.

**Analyze Data.** We analyze data based on best and promising practices and the PK team's experience. The data analyzed will all be directly connected to answering the research questions, and the PK team will maintain confidentiality, present the data as themes, and maintain cultural sensitivity. Our team's analysis combines qualitative and quantitative data to provide a comprehensive view.

**Identify Themes.** Themes and data results will be summarized and documented in relation to each research question. Findings will be based on qualitative and quantitative data analyses and perceptions.

**Handle Unexpected or Adverse Events.** Our team will work with you to address any unexpected or adverse events that may affect the assessment process or outcomes of the report or work during the assessment process. Unexpected or adverse events could include leadership changes, staffing cuts, natural disasters, public health crises, or other events. The report findings will reflect the events and the impact those had on the assessment process and outcomes.

**Report Findings.** The final Organizational Assessment Report will include an executive summary of the entire assessment, an overview of the assessment process (with the approved assessment protocol), the identified scope of the assessment, qualitative and quantitative data collected, data analysis, identified key themes, description of unexpected or adverse events, and report findings with recommendations.





## 2.2 Project Management Methodology

The proposal should include a summary of the project management measures required to ensure that the project is completed on time, within budget and in accordance with applicable laws, policies, standards, and good engineering practice. Include a graphical timetable that identifies achievable milestones.

To internally manage our projects, deliver project management (PM) services, and provide independent PM oversight, we apply the knowledge, skills, tools, and techniques recommended by the Project Management Institute (PMI) Project Management Body of Knowledge (PMBOK) 7th Edition. We supplement PMBOK guidelines with our proprietary **DitDah™ Method**.

Our methodology is named after the dots (Dits) and dashes (Dahs) of Morse Code, the language of the single-wire telegraph. The Morse system revolutionized communication and business practices and bridged gaps of time and space to bring people together. Like the Morse system, the **DitDah™ Method** is responsive to immediate needs, yet forward thinking. It brings the right people together to solve problems and bring positive change. It uses data-based methods to identify and analyze needs, collaborative facilitation to visualize creative solutions, and strategic thinking to plan more effective ways forward.

The **DitDah™ Method** strengthens PMBOK’s task-based approach to project strategy with a focus on the people side of projects through strategic partnerships, healthy project teams, and individual contributions. We also draw on more than 30 years of project management experience to customize and improve PMBOK’s performance reporting techniques and repeatable project management processes.

Our use of this methodology will allow for efficient, thoughtful, and people-centric management of this organizational assessment. Your project will be led by a team that prioritizes the needs of your staff. All 20 employees at the City of Breezy Point are crucial to its future and will be utilized accordingly.

Figure 3. PK Project Management Methodology

### Project Management Methodology





**Strategic Partnerships.** Focusing on client and stakeholder relationships builds the trust needed to make informed decisions quickly and resolve issues. We communicate clearly and regularly, and we use a collaborative consulting approach, involving the right people at the right time.

**Individual Contributions.** Building personal capacity fosters innovation, creative problem solving, and team effectiveness. We promote individual growth through regular feedback, coaching, mentoring, one-on-one meetings, and opportunities for professional development.

**Healthy Project Teams.** Attending to team dynamics, behaviors, and relationships increases project efficiency and quality. We use participative facilitation methods and other collaborative tools and processes to build effective internal, client, and joint project teams.

**Repeatable Project Management Processes.** A well-defined strategy and rigorous application of sound processes keep projects on track to achieve the desired outcomes. We adapt our proven tools and techniques, rooted in PMBOK best practices, to meet each client's unique needs.

**Predictive Performance Reporting.** Data-driven project monitoring, measuring, and reporting help our clients make informed and strategic decisions. We supplement PMBOK's approach with additional industry-leading data tools and techniques to provide accurate and predictive project insight.

**Phase 1 (Initiate) and Phase 2 (Plan).** Prior to kicking off the project, we help your project team transition from the initiation phase to the planning phase. We review your team's initiation artifacts, such as the project initiation document (PID), contracts, project charter, requirements definition, or business case. We establish our relationship with leadership, project team, and stakeholders and conduct internal team building activities. We verify the project scope, costs, resources, and guidelines; develop tools; document protocols; and create the roadmap we will follow to accomplish the project goals. When all relationships, tools, plans, and protocols are established, we conduct a kick-off meeting with your project team to communicate the project need, benefits, objectives, deliverables, schedule, and key milestones.

**Phase 3 (Execute).** Phases 3 and 4 of the PMBOK project management framework begin after the project kickoff and continue through the end of the project lifecycle. Phase 3 tasks focus on executing the project management plan, including resource allocation, scheduling, communication, contract administration and compliance monitoring, and other project control and management processes. Our proposed project manager, Melissa Murphy, will direct, manage, and support the project team's execution and modification (as needed) of project tasks and conduct check-ins and ad hoc communication with the City of Breezy Point team. This execution phase also includes deliverables management. This



includes developing a Deliverable Expectation Document and sign-off process and conducting our rigorous internal quality assurance process on each deliverable. As needed and requested and approved by you, we implement facilitating processes, such as procurement and staff acquisition, and we conduct regular internal project sync, teambuilding, targeting, and mentoring meetings.

**Phase 4 (Control).** Throughout the project lifecycle, we monitor the Organizational Assessment project's progress and performance, and we use predictive data analytics to measure and forecast variances from the project plan. We classify each variance as a risk (might impact the project) or issue (is impacting the project) and notify the Client/project PM immediately of significant issues. We use PMBOK-based processes to assess risk probability and impact, assign risk ratings, and categorize and prioritize risks and issues. We document this information and conduct regular status reporting calls with the City of Breezy Point team. We collaborate on risk response strategies and address contract or scope issues as needed by updating the project plan.

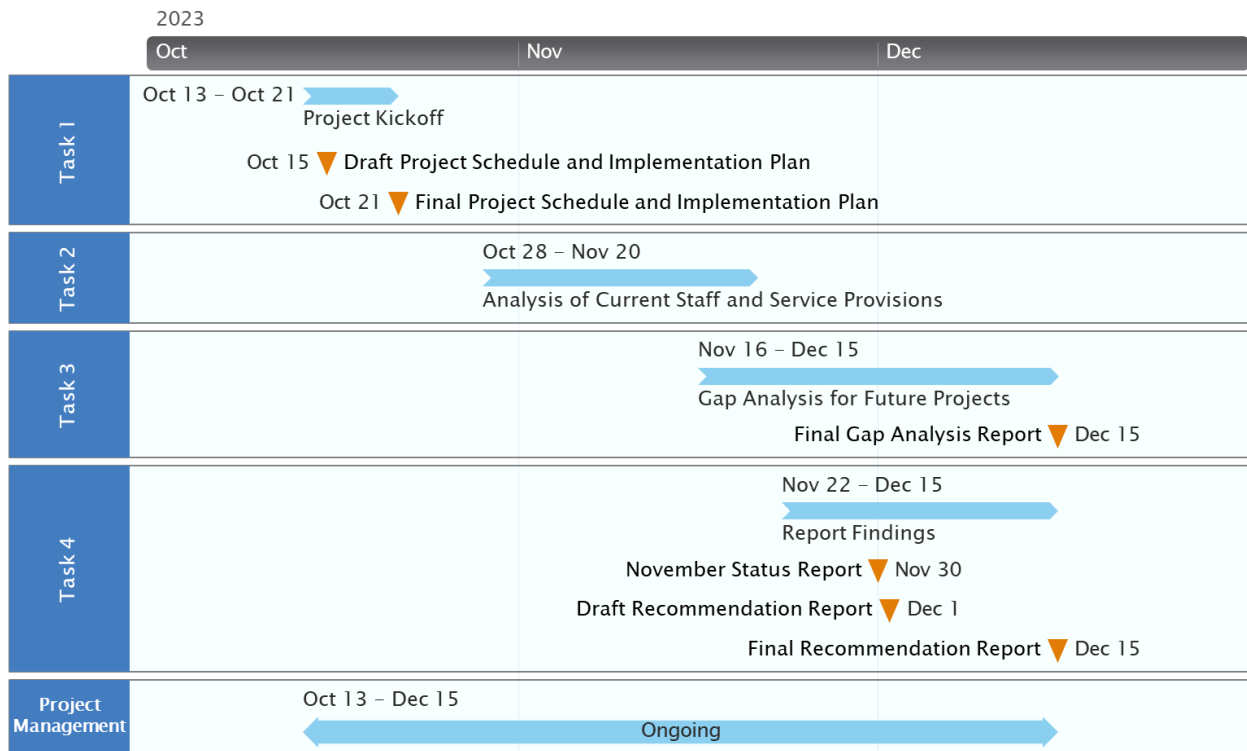
**Phase 5 (Close).** In the final phase of the project management lifecycle, we formalize the acceptance of the project and bring it to an orderly end. We follow a project closure procedure to make sure that we have met our obligations, documentation is complete, and you are satisfied with our work. We verify that the project has met the terms of the written agreement and finalize outstanding issues or discoveries outside the project scope. We review the final status of the project deliverables, budget, and resources, and we document lessons learned. We provide the closeout information to your leadership, management, accounting, project team, and stakeholders through documentation and project closure sessions as appropriate.

## 2.3 Detailed Work Plan

Include an itemized list of anticipated objects, goals, and sub-tasks for all deliverables, assign the number of hours required by each team member, and indicate the maximum not to exceed fee amounts for each sub-task. Identify any tasks not outlined in the deliverables that the respondent deems are critical to the success of the project. Include detailed cost breakdowns for these tasks as "alternate" options that we may review and/or consider as part of the contract. Provide and explain new technology and/or innovative strategies within these tasks to provide additional quality to this project.



Figure 4. Project Timeline



### Task 1: Project Kickoff

This Organizational Assessment will be a fast-moving project and will involve completing various activities in parallel. PK is committed to making the assessment activities as productive and painless as possible for the City of Breezy Point leadership, staff, and stakeholders. To complete a thorough and actionable assessment within the three-month project timeframe, we will start with an agreed-to project schedule and plan that will serve as a roadmap for both PK and designated leadership of the City of Breezy Point.

Table 1. Project Kickoff

<b>Estimated Hours</b>	18
<b>Expected Duration</b>	October 13, 2023, to October 21, 2023
<b>Representative Activities</b>	<ul style="list-style-type: none"> <li>• Conduct project kickoff meeting to initiate development of project schedule and plan</li> <li>• Finalize project schedule and plans</li> </ul>
<b>Assumptions</b>	<ul style="list-style-type: none"> <li>• The City of Breezy Point will invite appropriate staff for the initial kickoff meeting.</li> <li>• PK and the City of Breezy Point will work collaboratively to identify any known scheduling challenges.</li> </ul>



Table 1. Project Kickoff

<b>Deliverables</b>	<ul style="list-style-type: none"> <li>• Draft project schedule and implementation plan</li> <li>• Final project schedule and implementation plan</li> </ul>
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### Task 2: Analysis of Current Staff and Service Provisions

We will design an independent assessment methodology that ensures a thorough review of qualitative and quantitative data. The resulting deliverable for this task, Analysis of Current Staff and Service Provisions, documents how we will conduct the assessment and the results of our findings.

Table 2. Analysis of Current Staff and Service Provisions

<b>Estimated Hours</b>	102
<b>Expected Duration</b>	October 28, 2023, to November 20, 2023
<b>Representative Activities</b>	<ul style="list-style-type: none"> <li>• Develop research questions</li> <li>• Identify documents needed for review</li> <li>• Develop interview and focus group protocols</li> <li>• Develop survey questions</li> <li>• Identify candidates for interviews and focus groups</li> <li>• Identify survey audiences</li> <li>• Identify necessary data to acquire to support analysis of research questions</li> <li>• Meet with stakeholders to vet the assessment methodology and protocols, obtain feedback, and revise as necessary</li> </ul>
<b>Assumptions</b>	<ul style="list-style-type: none"> <li>• The City of Breezy Point will help ensure the PK team has access to the individuals or documents needed to develop the Assessment Methodology and Protocols.</li> <li>• The City of Breezy Point will review and provide timely feedback to draft documents.</li> <li>• The City of Breezy Point will identify stakeholders for receiving surveys, participating in focus groups, and for interviews.</li> </ul>
<b>Deliverables</b>	<ul style="list-style-type: none"> <li>• Analysis of Current Staff and Service Provisions</li> </ul>

### Task 3: Gap Analysis for Future Projects

After the facilitated focus groups, our team will review notes and diagrams to identify opportunities for process improvement. We will compile the inefficiencies, pain points, and improvement opportunities identified in Task 2 with our own process expertise. Our focus



is on identifying barriers and strategies for improvement and presenting them in a format that makes it easy for your team to determine which improvements are the most important to your objectives. This activity includes determining the level of effort to make each change and assessing the impact of making each change. We want to help your team replace short-term workarounds with long-term process improvement solutions, which is why engaging end users throughout the process is so vital.

Table 3. Gap Analysis for Future Projects

<b>Estimated Hours</b>	52
<b>Expected Duration</b>	November 16, 2023, to December 15, 2023
<b>Representative Activities</b>	<ul style="list-style-type: none"> <li>• Identify improvement opportunities</li> <li>• Develop draft report</li> <li>• Submit draft report for feedback</li> <li>• Revise draft report in response to project feedback</li> <li>• Submit final report, including a list of prioritized proposed process improvements</li> </ul>
<b>Assumptions</b>	<ul style="list-style-type: none"> <li>• No onsite work is planned for this task. Remote work, when appropriate, provides cost savings and increases flexibility for all stakeholders.</li> </ul>
<b>Deliverables</b>	<ul style="list-style-type: none"> <li>• Final Gap Analysis Report</li> </ul>

#### Task 4: Report Findings

PK will provide one monthly status report in November that will list our activities and identified risks and issues.

Upon receipt of all pertinent information related to the Assessment of Current Staff and Service Provisions, and the Gap Analysis, a final recommendation will be provided. The final recommendation will include immediate and future staffing needs, recommendations for reorganization, and recommendations for workforce skill sets or additional training needed to enhance service delivery.

Table 4. Reporting

<b>Estimated Hours</b>	21
<b>Expected Duration</b>	November 22, 2023, to December 15, 2023
<b>Representative Activities</b>	<ul style="list-style-type: none"> <li>• Deliver monthly status report</li> <li>• Develop a Draft and a Final Report with findings and recommendations for next steps</li> <li>• Present findings</li> </ul>



Table 4. Reporting

	<ul style="list-style-type: none"> <li>• Solicit feedback and edits</li> <li>• Revise the Final Report based on feedback</li> </ul>
<b>Assumptions</b>	<ul style="list-style-type: none"> <li>• The City of Breezy Point will review and provide timely input to drafts.</li> <li>• No onsite work is planned for this task. Remote work, when appropriate, provides cost savings and increases flexibility for all stakeholders.</li> </ul>
<b>Deliverables</b>	<ul style="list-style-type: none"> <li>• November Status Report</li> <li>• Draft Findings Report</li> <li>• Final Findings Report</li> </ul>

### Task 5: Project Management

As we noted above, to manage client projects, we supplement the Project Management Institute’s (PMI) Project Management Body of Knowledge (PMBOK) guidelines with our proprietary **DitDah™ Method**. The **DitDah™ Method** strengthens PMBOK’s task-based approach to project strategy with a focus on the people side of projects through strategic partnerships, healthy project teams, and individual contributions. We also bring 35 years of project management experience to customize and improve on PMBOK’s performance reporting techniques and repeatable project management processes.

Table 5. Project Management

<b>Expected Duration</b>	Throughout project duration
<b>Representative Activities</b>	<ul style="list-style-type: none"> <li>• Confirm initial timeline and project responsibilities based on the project requirements</li> <li>• Finalize the work plan and schedule with the City of Breezy Point team</li> <li>• Determine the project reporting and communication protocols</li> <li>• Conduct regular project status meetings and communicate the status of the project to the City of Breezy Point project managers and team</li> <li>• Assist in identifying, documenting, prioritizing, and managing project issues and risks</li> <li>• Track, manage, and follow up on action items for project team members</li> </ul>



<p><b>Assumptions</b></p>	<ul style="list-style-type: none"> <li>• The City of Breezy Point will identify stakeholders and key project participants and provide PK with their contact information.</li> <li>• The City of Breezy Point will have a project manager dedicated to the organizational assessment who will serve as a point of contact for PK.</li> <li>• The appropriate City of Breezy Point representatives will be available for the project kickoff and closeout meetings, status update meetings, and any other relevant meetings.</li> <li>• The City of Breezy Point will coordinate reviews of deliverables and will review deliverables within five days of submission.</li> <li>• The City of Breezy Point will provide PK with requested performance measurement data as requested or provide access to relevant artifacts, stakeholders, processes, and meetings.</li> </ul>
<p><b>Deliverables</b></p>	<ul style="list-style-type: none"> <li>• Kickoff meeting agenda and minutes</li> <li>• Final timeline and task plan</li> <li>• Agendas and minutes for project status meetings</li> <li>• Project plan and/or scope updates</li> <li>• Closeout letter</li> </ul>

## 2.4 Cost

PK will be pleased to work in partnership with the City of Breezy Point to complete an organizational assessment. We will lead, manage, and complete a comprehensive assessment of the city’s operations to improve performance and optimize services provided to its citizens.

Table 6 offers a breakdown of each task and its corresponding deliverables, the estimated number of consultant hours required, each consultant’s hourly rate, and the total not to exceed fee per deliverable. Our total cost to complete the work is **\$29,335** (please note travel expenses are not included in the below table but can be added if on-site work is required).





Table 6. Anticipated Tasks and Deliverables

Task	Deliverable	Consultant	Hours	Rate	Total Cost
Task 1: Project Kickoff	Project Kickoff Meeting	Lamar	2	\$285	\$570
		Melissa	2	\$160	\$320
		Monique	2	\$160	\$320
		Taylor	2	\$135	\$270
		<b>Total Deliverable Cost</b>			
Task 1: Project Kickoff	Draft Project Schedule and Implementation Plan	Lamar	-	\$285	\$0
		Melissa	4	\$160	\$640
		Monique	-	\$160	\$0
		Taylor	2	\$135	\$270
		<b>Total Deliverable Cost</b>			
Task 1: Project Kickoff	Finalize Project Schedule and Implementation Plan	Lamar	1	\$285	\$285
		Melissa	1	\$160	\$160
		Monique	1	\$160	\$160
		Taylor	1	\$135	\$135
		<b>Total Deliverable Cost</b>			
Task 2: Analysis of Current Staff and Service Provisions	Report: Assessment Methodology, Protocols and Processes	Lamar	-	\$285	\$0
		Melissa	14	\$160	\$2,240
		Monique	29	\$160	\$4,640
		Taylor	59	\$135	\$7,965
		<b>Total Deliverable Cost</b>			
Task 3:	Report: Gap Analysis	Lamar	1	\$285	\$285
		Melissa	6	\$160	\$960



Task	Deliverable	Consultant	Hours	Rate	Total Cost
Gap Analysis for Future Projects		Monique	15	\$160	\$2,400
		Taylor	30	\$135	\$4,050
		<b>Total Deliverable Cost</b>			
Task 4: Report Findings	November Status Report	Lamar	-	\$285	\$0
		Melissa	1	\$160	\$160
		Monique	2	\$160	\$320
		Taylor	-	\$135	\$0
		<b>Total Deliverable Cost</b>			
Task 4: Report Findings	Draft Findings Report	Lamar	-	\$285	\$0
		Melissa	2	\$160	\$320
		Monique	5	\$160	\$800
		Taylor	10	\$135	\$1,350
		<b>Total Deliverable Cost</b>			
Task 4: Report Findings	Final Findings Report	Lamar	1	\$285	\$285
		Melissa	1	\$160	\$160
		Monique	-	\$160	\$0
		Taylor	2	\$135	\$270
		<b>Total Deliverable Cost</b>			
<b>Total Project Cost</b>					\$29,335



### 3 Key Tasks Not Included

Provide and elaborate on key tasks this RFP may not include. Provide costs to each as alternative options.

Below we provide the option for as-is and to-be business process mapping. Business process mapping allows your team to deeply consider whether your existing business processes can support your current business needs and the vision you have for the future. Mapping business processes provides additional data to determine how to best align processes; business needs; your vision; and your staff’s current skills, training needs and hiring needs.

The cost to perform both optional tasks is **\$3,980**.

#### Optional Task 1: Document Current State Process Model

To make recommendations for improving processes and workflows, we will begin by mapping existing processes end to end. We will create Microsoft (MS) Visio charts depicting current processes and provide time for staff to validate (and edit) the charts, including estimating the time needed for the various steps in the end-to-end process. Through this activity, we will look for inefficiencies and estimate the time savings that could be achieved through changing processes. In similar engagements, we found that a picture is worth a thousand words. Often, the staff involved in a particular process are the first to identify the easy fixes. We will produce an “As Is” report from our work under this Task. That Report will become part of the Operational Assessment final report.

Table 7. Document Current State Process Model

Representative Activities	
	<ul style="list-style-type: none"> <li>• Identify members of focus groups by program area (e.g., Intake, Establishment, Enforcement, etc.) and schedule focus groups</li> <li>• Conduct focus groups</li> <li>• Conduct individual follow-up interviews for clarification as needed</li> <li>• Create MS Vision charts depicting end-to-end processes</li> <li>• Produce poster-size versions of the Visio charts to be hung in each office</li> <li>• Invite all staff to mark up the charts, including the time they estimate a step in the process takes</li> <li>• Revise the Visio charts as needed</li> <li>• Gather existing outcomes data</li> </ul>



	<ul style="list-style-type: none"> <li>• Produce “As Is” Report, with initial analysis of process costs, and areas for process improvement</li> </ul>
<b>Assumptions</b>	<ul style="list-style-type: none"> <li>• The City of Breezy Point will identify members for the various focus groups and provide PK with names and contact information.</li> <li>• Focus groups will be conducted virtually.</li> <li>• PK may elect to host multiple focus groups for a given process to keep the group size small.</li> <li>• The City of Breezy Point will make available any existing relevant performance data related to the various business processes.</li> </ul>
<b>Deliverables</b>	<ul style="list-style-type: none"> <li>• Process flow charts</li> <li>• Draft “As Is” Report</li> <li>• Final “As Is” Report</li> </ul>

### Optional Task 2: Document Future State Process Model

Future state process models serve dual purposes from informing future system vendors, helping end users navigate the system, and improving processes over time. Before these processes are implemented and assessed against your needs, the City of Breezy Point resources will have the opportunity to review and rethink the new processes. This step means that processes with unintended impacts or unique change management needs can be discussed before implementation.

Table 8. Document Future State Process Model

<b>Representative Activities</b>	<ul style="list-style-type: none"> <li>• Document “to be” process flows for each provision, ensuring: <ul style="list-style-type: none"> <li>• Process maps include process flow diagrams and documentation of resources used to execute the process, which can be easily understood and confirmed by the City of Breezy Point</li> <li>• Process maps include all agreed-upon the City of Breezy Point business processes</li> <li>• Process maps and supporting documentation delivered electronically to the City of Breezy Point</li> <li>• Relevant members can independently access and edit process maps and supporting documentation</li> </ul> </li> <li>• Review “to be” processes with the City of Breezy Point leadership</li> <li>• Revise process flows in response to project feedback</li> </ul>
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	<ul style="list-style-type: none"> <li>• Submit final “to be” process flows</li> </ul>
<b>Assumptions</b>	<ul style="list-style-type: none"> <li>• No onsite work is planned for this task. Remote work, when appropriate, provides cost savings and increases flexibility for all stakeholders.</li> </ul>
<b>Deliverables</b>	<ul style="list-style-type: none"> <li>• Draft Future State Process Models</li> <li>• Final Future State Process Models</li> </ul>

## 4 City Involvement

Identify anticipated involvement required by the City.

We discuss anticipated City involvement in Sections 2 and 3 under the Assumptions section of each task.

## 5 Experience and Qualifications

### 5.1 Firm Experience and Qualifications

Summarize the firm’s relevant qualifications and experience related to similar projects.

We have the experience, history, and expertise that will enable our proposed team to conduct a successful operational assessment for the City of Breezy Point. We have vast experience in initiating and implementing operational enhancements and training professionals to improve job performance by using advanced program techniques, automated systems, and enhanced skills. We have worked with state and local agencies in all 50 states. We have produced a wide range of reports and guides that have proven valuable resources for state and local child support staff and officials. Audiences for our materials have included policymakers, legislators, state and local public agency staff, employers, social services providers, and children’s advocates. Products include manuals, workbooks, handbooks, guides, monographs, computer-based training, and a range of audiovisual products.

“Public Knowledge® was successful because of the expertise they brought to the table. They brought the best of both worlds—consultants who had national expertise but also people who understood the complexities of our state and local system and our operational nuances.”

~North Carolina State Department of Health and Human Services Leader



**PUBLIC KNOWLEDGE®**  
YOUR CATALYST FOR CHANGE

A Multinational Management Consulting Firm Focusing on

**Systems**

We build consensus and commitment to help your team plan, procure, and implement transformational technology projects.

**Programs**

We integrate people, processes, policies, systems, and structures to improve outcomes.

**People**

We build high-performing organizations, teams, and individuals focused on impact.

**30 + Years Experience**

**We exist to solve tough problems and thrive in complex environments.**

Our vision is to be the catalyst for change, leaving each person, project, client, colleague, and community better than we started.

We summarize some relevant project experience below.



**North Carolina Department of Health and Human Services  
Comprehensive Child Welfare and Social Services Transformation**

North Carolina embarked on a journey to improve services to families and stakeholders across DHHS social services programs, particularly with Child Welfare Services and Aging and Adult Services. In the Child Welfare Services arena due, in part, to legislation after the death of a child in the child welfare system, state and county leaders came together to assess ways to improve service delivery, cross-agency collaboration, data sharing, and funding options across multiple programs. Realizing that a reform initiative is not an easy undertaking, the legislation required an independent third party to facilitate and inform the effort. PK was selected to help.

To achieve North Carolina's goals, we conducted a comprehensive review of North Carolina's social services and child welfare systems and developed recommendations. We completed an organizational assessment using individual and group interviews, surveys of all North Carolina's 100 counties, and analyzing staffing and salaries for counties providing services locally. Our assessment resulted in comprehensive reform plans for both social services and child welfare.<sup>1</sup>

<sup>1</sup> <https://www.osbm.nc.gov/stewardship-services/archived-reports/social-services-and-child-welfare-reform-reports> (PK was formerly known as the Center for the Support of Families, or CSF.)



## California San Bernardino County Child Support Services Operational Assessment

PK is completing an end-to-end assessment of San Bernardino, California's, Child Support Services program. Our team is charged with identifying operational efficiencies and ways the agency can improve customer engagement, leading to improved performance. The work involves conducting individual interviews and focus groups to map the agency's business processes: "As Is". We are also assessing the agency's training team and reports team. We will also look for best practices in other jurisdictions. The final deliverable is a "To Be" report, incorporating the vision and recommendations for the agency.

We have identified operational inefficiencies in current business practices to achieve enhanced alignment with the Department of Child Support Services' holistic case management approach, expanded customer engagement strategies, and improved performance results. Our team developed findings and recommendations that will result in improved operational efficiencies, responsive and timely customer service, and compliance with all regulatory and legal requirements.



## Wyoming Department of Health Division of Healthcare Financing Development Disabilities Section Organizational Redesign

The Wyoming Department of Health Behavioral Health Division, Developmental Disabilities Section (DD) has an increasing number of automated processes within the division. Subsequently, the number of manual processes employees must perform is decreasing. As the operations of the DD Section are being streamlined and automated through IT enhancements, job roles and duties must be re-assessed and aligned so that employees are being utilized in a way that adds value and meets the division's needs.

We assisted the DD Section by joining the effort to align job roles to division needs through an organizational assessment, a findings and recommendations report, developing a staff communication plan that will prepare staff for the change, and assisting with the development of an implementation plan.

## 5.2 Personnel Qualifications

List all personnel who will conduct the project, detailing their training, work experience, and job title. The project manager assigned to the project must be stated in the proposal



and shall continue as such throughout the project, as long as he/she is still employed by the firm.

In this section, we include an organizational depiction of the proposed project team and the hierarchy of the members. The chart below identifies the staff members and their roles. We identify key personnel, their qualifications, education, and experience in the table that follows.

Figure 5. Organizational Chart



Table 9. Staff Responsibilities and Qualifications


Consultant	Responsibilities	Summary of Qualifications
	<ul style="list-style-type: none"> <li>• Responsible for overall project delivery</li> <li>• Acts as a liaison to the City of Breezy Point</li> <li>• Manages project initiation and planning</li> </ul>	<p>As a regional vice president and child welfare industry leader at PK, Lamar is a seasoned child welfare and public services professional. He is an expert at optimizing fiscal activities and funding strategies and securing federal</p>





Table 9. Staff Responsibilities and Qualifications

Consultant	Responsibilities	Summary of Qualifications
<p>Lamar Smith Engagement Officer</p>	<ul style="list-style-type: none"> <li>• Assigns and monitors organizational assessment tasks</li> <li>• Oversees the development of project deliverables</li> <li>• Responds to special requests from the City of Breezy Point</li> <li>• Submits deliverables</li> <li>• Monitors and responds to scope change requests</li> <li>• Identifies quality issues and risks</li> <li>• Escalates issues and risks to the project sponsor or engagement officer for decision-making and risk mitigation strategies</li> </ul>	<p>funding to enhance child welfare services. His leadership at the Georgia Department of Human Services reflects his holistic approach, encompassing education, youth development, and healthcare coordination. His strategic planning prowess, regulatory compliance skills, and skill with fostering collaborative networks highlight his commitment to empowering children and families and the agencies that serve them. Lamar holds a bachelor’s degree in mass media arts and public relations. He is trained Government Communication by the Performance Institute, and Hogan Assessment certified.</p>



Melissa Murphy, MSW, MPH  
Project Manager

- Responsible for overall project delivery
- Acts as a liaison to the City of Breezy Point
- Manages project initiation and planning
- Assigns and monitors organizational assessment tasks
- Oversees the development of project deliverables

Melissa has six years of experience conducting organizational needs assessments, program evaluation, research design, and implementation. Her expertise extends to strategic planning, where she has dedicated five years of her career to helping organizations chart their course for the future with precision and foresight.



Table 9. Staff Responsibilities and Qualifications


Consultant	Responsibilities	Summary of Qualifications
	<ul style="list-style-type: none"> <li>• Responds to special requests from the City of Breezy Point</li> <li>• Submits deliverables to the City of Breezy Point</li> <li>• Monitors and responds to scope change requests</li> <li>• Identifies quality issues and risks</li> <li>• Escalates issues and risks to the project sponsor or engagement officer for decision-making and risk mitigation strategies</li> </ul>	<p>Melissa has led and authored reports for statewide initiatives, including environmental scans, health publications, and critical state reports. Her role in producing and disseminating statewide health publications ensures crucial information reaches its intended audience. Her dedication to quality is also evident in her work on state reports, where her meticulous attention to detail and commitment to accuracy stand out. Melissa completed coursework toward a Doctor of Philosophy in Public and Community Health, Medical College of Wisconsin. She holds both a Master of Social Work and a Master of Public Health.</p>
 <p>Monique Magee, MS Analyst and Human Resources Subject Matter Expert</p>	<ul style="list-style-type: none"> <li>• Reviews and contributes to PK deliverables</li> <li>• Conducts analysis of the City of Breezy organization and staffing</li> <li>• Supports the project manager in identifying risks and process improvements</li> <li>• Facilitates interviews and focus group sessions</li> <li>• Offers expertise in Human Resources</li> </ul>	<p>Monique boasts over a decade of expertise in successful performance management and leadership. She excels at leading high-performing teams, talent acquisition, and driving organizational change. Her pivotal role in implementing Michigan statewide initiatives and computer programs has significantly advanced that state's progress. With five</p>



Table 9. Staff Responsibilities and Qualifications


Consultant	Responsibilities	Summary of Qualifications
		<p>years of personnel management guidance, especially in labor-employment and staffing relations, Monique's multifaceted experience and commitment to excellence distinguish her as a standout professional. Monique holds a Master of Science in Administration and Human Resources Management from Central Michigan University. She is Franklin Covey trained in Project Management Essentials.</p>
 <p>Taylor Carroll, JD Analyst and Legal Subject Matter Expert</p>	<ul style="list-style-type: none"> <li>• Reviews and contributes to PK deliverables</li> <li>• Conducts analysis of the City of Breezy organization and staffing</li> <li>• Supports the Project Manager in identifying risks and process improvements</li> <li>• Facilitates interviews and focus group sessions</li> <li>• Offers Legal and Reporting expertise</li> </ul>	<p>With a deep expertise in military procurement law and criminal defense, Taylor has honed her skills to provide exceptional legal counsel. She assists Michigan municipalities in tackling various legal challenges, including zoning, land use, drainage districts, and compliance with the Open Meetings Act (OMA) and Freedom of Information Act (FOIA). Notably, Taylor has collaborated closely with city councils to navigate the complex landscape of evolving state regulations, leveraging city ordinances and resolutions to safeguard the rights of citizens. Her strategic acumen</p>



Table 9. Staff Responsibilities and Qualifications

Consultant	Responsibilities	Summary of Qualifications
		<p>shines through Michigan counties, devising comprehensive plans to meet specific metrics for state grant deadlines, such as post-secondary education attainment through the College Access Network. Taylor holds a Juris Doctorate, University of Toledo School of Law.</p>



## Appendix A: Resumes

Resumes for our team are included in the following order:

- Melissa Murphy, Project Manager
- Monique Magee, Analyst and Human Resources Subject Matter Expert
- Taylor Carroll, Analyst and Legal Subject Matter Expert



## Melissa Murphy, MSW, MPH

Project Manager

### Key Qualifications

- **Project Management:**
  - 13 years of experience, including roles as Director of Public Health and Senior Research Analyst, for she successfully led initiatives, conducted data analysis, and collaborated with diverse stakeholders to advance public health objectives
- **Strategic Planning**
  - Assisted with strategic plan revisions and created action plans
  - Devised methodology for staff input on SWOT analysis
  - Revised and created mission, vision, and value statements
- **Organizational Assessments (six years):**
  - Conducting needs assessments, program evaluations, and research design and implementation
  - Leading and authoring reports for various statewide initiatives
- **Research Study Evaluation:**
  - Directed research design implementation to establish evidenced-based trauma-informed practice
  - Collaborated with program staff and external stakeholders for strategic direction
  - Developed and executed participant recruitment strategies
  - Designed qualitative data collection strategy
  - Managed operational planning, logistics, and evaluation activities

### Sample of Relevant Projects

<b>North Carolina Child Welfare Transformation, North Carolina Department of Health and Human Services, Project Controller</b>	7/2023 – 6/2024
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PK assists the Department of Human Services in planning and implementing comprehensive child welfare reform. This includes work to support the Child Welfare Reform Team, operationalize the Practice Model, maximize available funding, reinstate the Education Collaborative, and implement the Family First Prevention Services Act (FFPSA). Melissa’s responsibilities include:



## Melissa Murphy, MSW, MPH

### Project Manager

- Collaborate with North Carolina Department of Social Services staff to plan for the statewide implementation of new evidence-based prevention programs.
- Identifying counties for program roll-out based on available data
- Development and operationalizing of the statewide communication plan for the new prevention framework
- Goal monitoring and timeline setting for FFPSA implementation
- Implementation and coordination planning for the state Child and Family Services Review (CFSR)
- Qualitative data collection and analysis
- Updating policies and procedures consistent with new federal and state laws and regulations

**Annual Governor's Report**, Wisconsin Office of Children's Mental Health (OCMH), Senior Research Analyst

9/2019 –  
5/2021

The WI OCMH reports all children's mental health activities to the Governor's Office. The Senior Research Analyst is solely responsible for compiling data, interpreting findings, and presenting results to the public at a live event at the Capitol once a year. Melissa's responsibilities included:

- Data collecting, analysis, and dissemination of 42 child health and well-being indicators
- Selecting indicators and recommending measurements by using established criteria with a public health lens
- Preparing data and presentations to four Collective Impact Workgroups with state-wide membership from all sectors, including those with lived experience
- Responsible for the Office's strategic planning and consultation for workgroup execution of activities
- Co-collaborated with the First Lady of Wisconsin, Kathy Evers, to develop a social-emotional parental awareness campaign
- Developing OCMH survey and evaluation questions, data visualization, and technical report writing
- Researching and writing monthly fact sheets related to children's mental health subject matter, communicated to the public via media press release



**Melissa Murphy, MSW, MPH**  
Project Manager

- Researching all children’s mental health programs and funding in Wisconsin, highlighting where activities overlap to improve state agency and community collaboration

**Data Collection and Policy Development** Wisconsin Department of Health Services, Program and Policy Analyst 9/2018 – 4/2019

Wisconsin develops a State Health Plan every five years that informs future health Improvement priorities. Melissa’s responsibilities included:

- Completing the Community Themes and Strengths Assessment as part of the Mobilizing for Action through Planning and Partnerships Framework
- Collecting and analyzing qualitative data from state residents
- Providing coordination, technical assistance, and performance monitoring

**Work Experience**

**Public Knowledge®**, Management Consultant 5/2023 – Ongoing  
Providing management consulting services to help government agencies solve tough problems and thrive in complex situations

**STRYV365 Inc**, Director of Public Health 2/2020 – 1/2023  
STRYV365 is a non-profit organization that creates customized, non-clinical trauma-informed programming. The programs are designed to foster positive childhood relations, strengthen interpersonal skills, and increase the ability to be resilient during challenging times.

**Wisconsin Office of Children’s Mental Health**, Senior Research Analyst 9/2019 – 5/2021  
The Office of Children’s Mental Health supports Wisconsin’s children in achieving their optimal mental health and well-being. By encouraging collaboration across child and family service systems in WI, including state agencies, nongovernment mental health programs, advocates, and people with lived experience, OCMH supports children’s mental health system improvements.





**Melissa Murphy, MSW, MPH**  
Project Manager

**Wisconsin Department of Health Services, Senior Training Officer –** 4/2019 –  
**Bureau of Communicable Diseases** 9/2019

The Bureau is responsible for surveillance, control, and prevention of more than 70 reportable communicable diseases. In addition, the BCD provides education, outreach, and assistance to local departments.

**Wisconsin Department of Health Services, Program and Policy Analyst** 9/2019 –  
**– Office of Policy and Practice Alignment** 4/2019

The Office is responsible for building partnerships and providing leadership and support through the development and recommendations of statewide policy related to the Wisconsin Public Health System.

**Department of Health, Village of Greendale, Program Planner** 1/2018 –  
5/2018

The Village serves over 14,000 residents with a focus on mental health, physical activity and nutrition, and older adult health.

**Department of Health, City of Greenfield, Strategic Planner** 1/2018 –  
5/2018

The City of Greenfield serves over 38,000 residents with a focus on behavioral health, healthy aging, nutrition and physical activity

**Princeton Hospital, Princeton House, Quality Improvement Director/** 1/2000 –  
**Joint Commission Accreditation Manager** 12/2002

Princeton House Behavioral Health, a unit of Princeton Health, is a leading provider of inpatient, outpatient, and emergency services for adults with mental illness, substance use disorder, or both.

**Magellan Behavioral Health, NCQA and URAC Accreditation Manager** 5/1998 –  
12/2000 and  
12/2002–  
3/2004

Magellan Healthcare partners with states to manage behavioral health programs through care coordination, case and utilization management programs, and a vast network of behavioral health and specialty providers.



## Melissa Murphy, MSW, MPH

Project Manager

### Education

Doctor of Philosophy: Public and Community Health, Medical College of Wisconsin (coursework only) 2022

Master of Public Health: Community Health and Preventative Medicine, Medical College of Wisconsin 2019

Master of Social Work: Social Administration, Temple University School of Social Administration 1998

### Certifications and Training

Human Subject Research/Social Behavior Research, CITI 2020



**Monique N. Magee, MS**  
Human Resources Subject Matter Expert

**Key Qualifications**

- **Holistic HR Leadership (two years):** Orchestrated a dynamic initiative spanning comprehensive human resource functions, benefiting over 100 employees.
- **Training and Mentorship Pioneer (four years):** Spearheaded a transformative training program, elevating the capabilities of the Department of Human Services (DHHS) and private agency staff.

**Sample of Relevant Projects**

**Policy Oversight and Support Management for Social Service Programs, State of Michigan, Program Manager** 3/2020 – 8/2023

Provided support direction and served as a resource to over 50 subordinate supervisors and staff to properly apply policies, procedures, laws, and regulations for various social service programs. Monique’s responsibilities included:

- Providing ongoing interpretation of policy in place and new policy as issued that governs program functions
- Evaluating and monitoring policy implications across program areas
- Managing, monitoring, coordinating, and providing guidance on personnel actions within the organization structure
- Monitor and evaluate statistical/data reports and evaluate local trends to support the administration of programs and determine if objectives have been met

**Comprehensive HR Management and Employee Engagement Project, Lowes Companies, Inc., Human Resources Manager** 6/2008 – 5/2010

Led a dynamic initiative encompassing diverse human resource functions, benefiting over 100 employees. Her multifaceted role touched every aspect of employee well-being, from recruitment and training to fostering a positive workplace culture. Monique’s responsibilities included:

- Managing human resource functions, including staffing, training, employee relations, recognition programs, benefits, and initiatives



**Monique N. Magee, MS**  
Human Resources Subject Matter Expert

- Serving as the point of contact for managers and employees regarding the interpretation of benefits, departmental and corporate policies
- Maintaining all personnel files and following company requirements for record-keeping, assuring accuracy, compliance, and confidentiality
- Addressing job-related issues and performance improvement and consulted on salary increases and performance reviews
- Reestablished a mentoring program, which helped to improve employee retention and increase job satisfaction

**Strategic Training and Mentorship Initiative for Department of Human Services and Private Agency Staff, State of Michigan, Lead Human Resources Developer**

10/2004 –  
6/2008

Spearheaded a dynamic training program that significantly enhanced the knowledge and capabilities of the Department of Human Services (DHS) line and private agency staff. Through her innovative training design and mentorship efforts, she played a pivotal role in aligning staff practices with state policy and federal regulations. Monique’s responsibilities included:

- Designing and conducting classroom training for DHS line and private agency staff per state policy and federal regulations
- Providing staff with the skills and knowledge to perform their jobs and translating theory into practice to align with the agency’s policy, federal and state law
- Acting as the lead trainer responsible for supporting new trainees through mentoring, observation, and feedback through formal evaluation processes
- Responsible for developing assessment techniques and evaluating programs such as staff development and training to make recommendations for improvement
- Responsible for co-developing and co-training a segment to improve workplace safety injunction with the Governor’s Task Force to over 1,000 service workers statewide



**Monique N. Magee, MS**  
Human Resources Subject Matter Expert

**Work Experience**

**Public Knowledge®, Management Consultant** 8/2023 – Ongoing  
Providing management consulting and learning services to help our clients solve tough problems and thrive in complex situations

**State of Michigan, Services Program Manager 15** 3/2020– 8/2023  
Directly managed first-line TANF and child welfare supervisors to ensure the proper application of policies and procedures.

**State of Michigan, Services Program Manager 14** 5/2011 – 3/2020  
First-line supervisor in multiple programs, including foster care, protective services, juvenile justice, centralized intake, Michigan Youth Opportunity Initiatives, and child welfare funding specialist.

**State of Michigan, Services Specialist** 5/2010 – 5/2011  
Provided casework services to dependent, neglected, abused, and delinquent children, youth, and socially and economically disadvantaged and dependent clients.

**Lowe’s Companies Inc, Human Resources Manager** 6/2008 – 5/2010  
Led activities and ensured achievement of objectives related to employee engagement, workforce management, performance management, talent development succession planning, DEI (diversity, equity, and inclusion), and change management.

**State of Michigan, Lead Human Resource Developer** 10/2004 – 6/2008  
Provided staff with the skills and knowledge to perform their jobs and translated theory into practice to show alignment with federal and state law policy.



## **Monique N. Magee, MS**

Human Resources Subject Matter Expert

### **Education**

Master of Science: Administration and Human Resources Management, 2006  
Central Michigan University

Bachelor of Arts: Psychology Saginaw Valley State University 2004

### **Certifications and Training**

Project Management Essentials, Franklin Covey 2022

Middle Management Training Track, Franklin Covey 2020

Systemic Racism, ERRACE 2017



## Taylor Carroll, JD

Analyst and Legal Subject Matter Expert

### Key Qualifications

- **Legal Expertise (four years):**
  - Experience in various aspects of law, including municipal law, military criminal law, bankruptcy, and criminal defense, demonstrating a diverse legal skill set.
  - Experience working closely with local city council in a legal capacity to write and propose resolutions and city ordinances.
  - Success in identifying federal legal loopholes to reroute ARPA dollars to better support women affected by the recent abortion bans.
- **Research and Analysis:** Strong research background, enabling her to provide thorough and creative solutions to complex legal issues.
- **Litigation Support:** Actively contributed to legal proceedings, including conducting examinations, preparing memoranda, and filing legal documents.

### Sample of Relevant Projects

**Legal Solutions for Municipalities**, Fahey, Schultz, Burzych, Rhodes, LLC, Law Clerk 1 /2023 – 5/2023

Taylor worked with municipalities to solve legal issues involving zoning and land use matters, Open Meetings Act and Freedom of Information Act, county drains and drainage issues. Taylor’s responsibilities included:

- Researching and writing memorandums to creatively solve various legal issues presented to municipalities.
- Prepping for and attending Drain Commissioner meetings to assist supervising attorney to solve questions presented during the open forum.
- Drafting drainage affidavits on behalf of municipalities to properly notice landowners of easements and other land encroachments.

**Military Criminal Law Analysis and Advocacy**, United States Army Judge Advocate General's Corps, 2L Internship 6/2022 – 8/2022



Taylor worked as a civilian in the office of the XVIII Airborne Corps Staff Judge Advocate, assisting JAG attorneys in prosecuting criminal matters on behalf of the Military Justice Department. Taylor’s responsibilities included:

- Researching military criminal matters and reporting to the Staff Judge Advocate and 2–star Commanding General at Fort Bragg.
- Prepared for and conducted direct examination of testifying witnesses—including two court martials on Fort Bragg military base.
- Prepared prosecution memoranda to be submitted to the Eastern District of NC Federal Court under direct supervision of the Special Assistant U.S. Attorney.
- Co–authored with Maj. Sean Zehtab, an article addressing the competitive advantage of former government employees arising from personal conflicts as former government employees, was published in the Procurement Lawyer Vol. 58, No. 1.

**Bankruptcy and Debt Resolution Support, Perez Conrique Law,**  
Bankruptcy Law Clerk

6/2021 –  
1/2022

Taylor helped clients better understand and navigate the bankruptcy, debt defense, and debt negotiation process. Taylor’s responsibilities included:

- Assisting supervising attorney to file Chapter 7 and Chapter 13 bankruptcies on behalf of clients.
- Working directly with the advising attorney to draft and answer requests for admission, interrogatories, requests for documents, and other discovery tools.
- Negotiated to accomplish debt settlement on behalf of clients involving debts up to \$500,000.
- Researched complex issues arising from matters involving foreclosure, defense of homeowners against HOA’s, and bankruptcy matters at the height of COVID–19 regulations.

**Criminal Defense and Victim Representation Support, Sarah Anjum**  
Attorney at Law, Legal Intern

9/2017 –  
1/2018

Taylor worked with the lead attorney to provide criminal defense and victim representation. Taylor’s responsibilities included:

9/2022 –  
1/2023





- Conducting criminal defense research, writing legal memorandums, and filing pleadings for the supervising attorney.
- Aiding supervising attorney throughout the litigation of criminal defense matters, including a high-profile death penalty case.

## Work Experience

**Public Knowledge®, Management Consultant** 8/2023 – Ongoing  
 Providing management consulting services to help government agencies solve tough problems and thrive in complex situations

**Fahey, Schultz, Burzych, Rhodes, LLC, Law Clerk** 1/2023 – 5/2023  
 Assisted Michigan municipalities in solving legal issues involving zoning and land use matters, the Open Meetings Act and Freedom of Information Act, and county drains and drainage issues

**United States Army Judge Advocate General's Corps, 2L Internship** 6/2022 – 8/2022  
 Worked as a civilian in the office of the XVIII Airborne Corps Staff Judge Advocate, assisting in prosecuting criminal matters on behalf of the Military Justice Department.

**Perez Conrique Law, Bankruptcy Law Clerk** 6/2021 – 1/2022  
 Assisted clients to understand better and navigate the process of bankruptcy, debt defense, and debt negotiation.

**Orange County Legal Aid, Intake Volunteer for Pro-Bono** 5/2021 – 9/2021  
 Assisted low-income and elderly individuals with their legal problems regarding the following areas: Bankruptcy, Family Law, and Property Law.

**Sarah Anjum Attorney at Law, Legal Intern** 9/2017 – 1/2018  
 Assisted in helping the lead attorney provide criminal defense and victim representation. 9/2022 – 1/2023

## Education

Juris Doctorate, University of Toledo School of Law 2023



Masters in Islamic Studies, University of Sarajevo (coursework only)	2019
Bachelor of Arts: Middle Eastern Studies, University of Toledo	2018

## Professional Affiliations

### Barry Law Rotaract Club, President, 2021

Taylor founded the Barry Law Rotaract club during her first year of law school with the help of the Orlando Rotary Club. Working alongside the parent club, the Barry Law Rotaractors were able to participate in legislative reform surrounding police sexual abuse of detainees and various philanthropic projects aimed at bettering the City of Orlando.

### United Way of Monroe and Lenawee County, Volunteer, 2010–2018

Taylor has worked with the United Way's dedicated team for many years to accomplish day-to-day administrative tasks and annual fundraising campaigns.

### Girls Varsity Basketball, Assistant Coach, 2021–2022 Season

Taylor volunteers her time helping out with the varsity girls' practices and hosting little girls' basketball camps. However, in mid-season, the team unexpectedly lost their head coach, and Taylor gladly filled in as coach for the remainder of the season.