

A Proposal to Conduct a Management, Organizational Structure and Efficiency Study for all Town Departments for the Town of Carolina Beach, NC

ORIGINAL



Evergreen Solutions, LLC

June 4, 2020

Table of Contents

- 1. Statement of Qualifications and Level of Experience.....1**
 - 1.1 Select Relevant Experience.....3
 - 1.2 References 4
 - 1.3 Qualifications of Project Team 4

- 2. Description of the Firm’s Overall Approach to the Project8**

- 3. Assistance from Town Staff and Elected Officials.....16**

- 4. Detailed Timeline17**

- 5 Deliverables17**

- 6. Proof of Insurance and Disclosure of any Litigation17**

- 7. Staffing Continuity.....17**

- 8. Preliminary Cost Proposal.....18**



Evergreen Solutions is well qualified to conduct a Management, Organizational Structure and Efficiency Study for all Town Departments within the Town of Carolina Beach due to our experience in providing similar services to other public sector organizations throughout the country, including North Carolina. In our response to the Request for Proposals (RFP), we have provided the following sections: 1) Statement of Qualifications and Level of Experience; 2) Detailed Description of the Firm's Overall Approach to the Project; 3) Assistance from Town Staff and Elected Officials; 4) Detailed Timeline; 5) Deliverables; 6) Proof of Insurance and Disclosure of any Litigation; 7) Staffing Continuity; and 8) Preliminary Cost Proposal. **We have kept our proposal to no more than 20 pages, including the cover letter and executive summary.**

1) Statement of Qualifications and Level of Experience

Evergreen Solutions, LLC is a national, multidisciplinary, public sector management consulting firm, which specializes in working with public sector organizations, including hundreds of local governments, across the nation. We provide a unique approach, rather than the "consulting as usual" approach, by partnering with our clients to find innovative, real world solutions to public management.

Evergreen Solutions was formed in 2004 provide a modern, practical alternative to the typical consulting options. The firm is made up of management and human resource professionals as well as strategic partners who came together to form an innovative alternative that places clients and their needs before any individual, model, or corporate goal.

Evergreen's philosophy is based on an understanding that there is not a "one size that fits all" solution to compensation management. Our approach is built on working collaboratively with all parties to make sound, implementation-focused recommendations.

Evergreen Solutions is a female-owned business, certified as a W/MBE in many states and municipalities across the country. Evergreen is certified as a HUB in the State of North Carolina.

Our main focus is on people, management, and technology. This focus allows our team to provide a broad variety of services, including, but not limited to: efficiency studies; staffing studies and workload analyses; HR department reviews; Ofication and compensation studies; performance evaluation and appraisal system design; recruitment, hiring, and retention studies; strategic and workforce planning; and labor pool availability.

Evergreen Solutions assists public sector professionals in exercising control over the inter-related elements that determine success or failure. We do that by applying a situation-responsive discipline that emphasizes: full visibility into the entire organization through research and discovery; a spirit of partnership with staff and leadership; sound recommendations based on best practices and proven methods; and a practical go-forward plan that leads to quantifiable results.

Collectively, the members of the Evergreen Solutions Team have: extensive experience conducting management, organizational structure, and efficiency studies for public sector organizations throughout the country, including many in the State of North Carolina; comprehensive experience in all components vital to the successful completion of this engagement; knowledge of relevant North Carolina statutes and regulations as well as federal regulations; objectivity and flexibility due to the fact that we have no vested interests; and specialized analytical tools that we bring to the project.

Clients nationwide have been successfully implementing recommendations from our team of professional consultants for decades. Evergreen has contracted with public sector, quasi-governmental, and non-profit organizations in 46 states throughout the country.

Exhibit 1 includes a sample list of local government clients that Evergreen has worked with, or is currently on contract to work with, in a variety of management and human resources consulting capacities, including management, organizational structure, and efficiency studies.



RESPONSE TO REQUEST FOR PROPOSALS

Exhibit 1: Sample List of Local Government Clients

Spokane County, WA	Carter County, TN	Transylvania County, NC	City of Daytona Beach, FL
City of Albany, OR	Blount County, TN	Union County, NC	City of Cape Coral, FL
City of Beaverton, OR	Mahoning County, TN	City of Chester, SC	City of Destin, FL
Columbia County, OR	City of Kalamazoo, MI	City of Columbia, SC	City of Doral, FL
City of Reno, NV	City of Pittsburgh, PA	City of Conway, SC	City of Fort Walton Beach, FL
City of Flagstaff, AZ	County of Allegheny, PA	City of Goose Creek, SC	City of Ft. Myers, FL
City of Page, AZ	County of Montgomery, PA	City of Lancaster, SC	City of Gainesville, FL
City of Prescott, AZ	Ulster County, NY	City of Mauldin, SC	City of Holmes Beach, FL
Town of Sahuarita, AZ	Town of Colchester, VT	Town of Cheraw, SC	City of Jacksonville Bch, FL
Pima County, AZ	City of Annapolis, MD	Town of Hilton Head Island, SC	City of Jacksonville, FL
City of Carlsbad, NM	City of Hagerstown, MD	Town of Moncks Corner, SC	City of Key West, FL
City of Hobbs, NM	City of Hyattsville, MD	Town of Mount Pleasant, SC	City of Lake City, FL
City of Santa Fe, NM	City of Westminster, MD	Berkeley County, SC	City of Largo, FL
Ouray County, CO	Alleghany County, MD	Charleston County, SC	City of Orlando, FL
City of Fountain, CO	Charles County, MD	Dorchester County, SC	City of Palm Beach Gardens, FL
City of Manitou Springs, CO	Washington County, MD	Spartanburg County, SC	City of Panama City Beach, FL
Ogden City Corporation, UT	Kent County Levy Court, DE	Beaufort County, SC	City of Panama City, FL
City of Amarillo, TX	City of Covington, VA	Marshall County, AL	City of Kissimmee, FL
City of Austin, TX	City of Fredericksburg, VA	Baldwin County, AL	City of Sarasota, FL
City of Buda, TX	City of Newport News, VA	Lee County, AL	City of Parkland, FL
City of Conroe, TX	City of Suffolk, VA	City of Foley, AL	City of Pensacola, FL
City of Duncanville, TX	City of Williamsburg, VA	City of Alpharetta, GA	City of Plant City, FL
City of Farmers Branch, TX	Alleghany County, VA	City of Brookhaven, GA	City of Plantation, FL
City of Fate, TX	Chesterfield County, VA	City of Chamblee, GA	City of Sunny Isles Beach, FL
City of Fredericksburg, TX	County of Culpeper, VA	City of Commerce, GA	City of Temple Terrace, FL
City of Lakeway, TX	County of Northampton, VA	City of Dahlonga, GA	City of Venice, FL
City of Lockhart, TX	County of York, VA	City of Dalton, GA	City of North Miami Beach, FL
City of Mont Belvieu, TX	Essex County, VA	City of Douglasville, GA	Alachua County, FL
City of Pflugerville, TX	Gloucester County, VA	City of Dublin, GA	Bay County, FL
City of Rowlett, TX	Isle of Wight County, VA	City of Duluth, GA	Brevard County, FL
City of Sachse, TX	James City County, VA	City of Dunwoody, GA	Charlotte County, FL
City of Seguin, TX	King George County, VA	City of Fayetteville, GA	Citrus County, FL
City of Sunset Valley, TX	Loudoun County, VA	City of Forest Park, GA	Flagler County, FL
City of Portland, TX	Louisa County, VA	City of Garden City, GA	Gadsden County, FL
City of Padre Island, TX	Montgomery County, VA	City of Kingsland, GA	Gulf County, FL
Town of Little Elm, TX	Prince George County, VA	City of Roswell, GA	Hernando County, FL
Brazoria County, TX	Prince William County, VA	City of Savannah, GA	Highlands County, FL
Denton County, TX	Shenandoah County, VA	City of Statesboro, GA	Leon County, FL
Fort Bend County, TX	Spotsylvania County, VA	City of Stockbridge, GA	Manatee County, FL
Hood County, TX	Surry County, VA	City of Tybee Island, GA	Martin County, FL
Kaufman County, TX	City of Goldsboro, NC	City of Woodstock, GA	Miami-Dade County, FL
City of Broken Arrow, OK	City of Raleigh, NC	Cherokee County, GA	Monroe County, FL
Sedgwick County, KS	Buncombe County, NC	Douglas County, GA	Osceola County, FL
City of Branson, MO	Davie County, NC	Forsyth County, GA	Palm Beach County, FL
City of Lee's Summit, MO	Duplin County, NC	Lumpkin County, GA	Pinellas County, FL
Clay County, MO	Franklin County, NC	Worth County, GA	Santa Rosa County, FL
Jackson County, MO	Gaston County, NC	City of Winter Park, FL	Sarasota County, FL
Jefferson County, MO	Guilford County, NC	City of St. Petersburg, FL	Seminole County, FL
St. Charles County, MO	Haywood County, NC	City of Alachua, FL	Sumter County, FL
City of Bloomington, IN	Lee County, NC	City of Coral Springs, FL	
City of Urbana, IL	New Hanover County, NC	City of Dania Beach, FL	



1.1 Select Relevant Experience

The following is a list of the projects that we have conducted for public sector clients that are similar in scope to those services being requested by the Town of Carolina Beach. We chose only those similar local government projects in the State of North Carolina due to the page limitation requirements. Evergreen has also performed similar studies for many school districts in the State of North Carolina as well as similar work in other states. **A sample final report from any of these studies is available upon request.**

Performance Audit and Financial Review – Davie County

Evergreen Solutions was retained by Davie County to conduct a comprehensive Performance Audit of Davie County Departments as well as a detailed Financial Review of Davie County Public Schools. The first part of the study, the performance audit, focused on the organizational, operational, and financial efficiency and effectiveness of Davie County operations from a departmental standpoint. The second segment of the study, the financial review of school operations, aimed at assisting Davie County Public Schools in continuing to succeed and improve in its primary mission, the education of all students. In the end, Evergreen presented findings and recommendations to key stakeholders on containing costs, improving management strategies, and improving the overall efficiency, effectiveness, and productivity of the county and the school district.

The initial phase of the study involved a careful analysis of county government operations in each department, including human resources, information technology, public safety, health, social services, solid waste and water, tax, and several other departments. Specifically, Evergreen reviewed past reports and existing data sources, conducted interviews, and established a channel for community input to begin the analysis. Next, Evergreen's team benchmarked Davie County operations to operations in peer districts using comparative data and statistical analysis. Pairing the outcome of this analysis with findings from on-site reviews and interviews, Evergreen determined areas where the county could make improvements to existing processes, plans, and procedures.

Performance Audit and Financial Review - Lee County

Lee County hired Evergreen Solutions to conduct a comprehensive Performance Audit of Lee County Departments as well as a detailed Financial Review of Lee County Public Schools (LCPS). The first section of the study, the financial review of school operations, aimed at assisting Lee County Public Schools in continuing to succeed and improve in its primary mission, the education of all students. The second part of the study, the performance audit, focused on the organizational, operational, and financial efficiency and effectiveness of Lee County operations from a departmental standpoint. In the end, Evergreen presented findings and recommendations to key stakeholders on containing costs, improving management strategies, and improving the overall efficiency, effectiveness, and productivity of the county and the school district.

Concurrent with the review of school district financial operations, Evergreen conducted phase two of the study; an analysis of county government operations in each department. Specifically, Evergreen reviewed past reports and existing data sources (policies, organizational charts, financial audits, job descriptions, salary schedules, employee handbook, etc.), conducted interviews, and established a channel for community input to begin the analysis. Next, Evergreen's team benchmarked Lee County operations to operations in peer districts using comparative data and statistical analysis. Pairing the outcome of this analysis with findings from on-site reviews and interviews, Evergreen determined areas where the county could make improvements to existing processes, plans, and procedures.

Organizational Structure Review - City of Raleigh

Evergreen Solutions is engaged with the City of Raleigh to review the organizational structure of the Transportation Planning service unit. For this review, Evergreen consultants will: review the overall organizational structure of the Transportation Planning service unit; meet with and gain an understanding of the team members in the service unit; determine if the current organizational structure best meets the needs of the service unit; and make recommendations on how to improve the organizational structure to enhance efficiency and effectiveness.



Efficiency and Effectiveness Study - Land-of-Sky Regional Council

Evergreen Solutions was hired by the Land-of-Sky Regional Council in North Carolina to conduct an Efficiency and Effectiveness Study. The foundation of Evergreen's approach to conducting this study centered on the simple premise of aligning needs with resources in an optimal manner. Strategic needs were the main driving force for the Council in examining its direction and alignment. Strategic needs included the expectations of citizens, the needs of the community, and the relative resources available to the Council. Therefore, in conducting the performance audit, Evergreen consultants: assessed the organizational effectiveness and operational performance levels of the Regional Council; assisted the Regional Council in continuing accomplishments through a steadfast commitment to efficient and effective support operations; identified, initiated, and institutionalized best practices, which could be identified from other government or private industry providers of similar service or functions, throughout the Regional Council; identified potential savings associated with implementing best practices; identified costs to implement recommendations; and developed an implementation plan to realize quickly the maximum benefits.

In the end, Evergreen developed findings, commendations, and recommendations for containing costs and improving management strategies that led to better and more efficient expenditures of funds.

Performance Audit of the Health Department - Yadkin County

The purpose of the Performance Audit was to conduct an objective and systemic examination of the Health Department using a structured and professionally adopted methodology to evaluate overall efficiency, effectiveness, and productivity. The foundation of Evergreen's approach methodology for this study was based on the simple premise of aligning needs with resources in an optimal manner; specifically, alignment of communication, resources, processes, and organizational objectives. Evergreen's conceptual model for completing such a study was designed with a top down approach. That is, higher level strategic needs such as citizen expectations, community needs, and relative resources are first assessed during the audit. Then, individual service models for specific functional areas are analyzed. Finally, operational components such as organization and management, resources management, and policies and procedures are assessed for inefficiencies. This top down approach is optimal for identifying areas in which the Health Department can become more efficient, effective, and productive.

In the end, Evergreen presented a final report of the findings, commendations, and recommendations to the Yadkin County Board of County Commissioners which will provide specific recommendations and implementation plans to optimize Yadkin Health Department's overall performance.



1.2 References

Efficiency and Effectiveness Study - Land-of-Sky Regional Council, NC

Contact Information: Justin Hembree, Former Executive Director, Land and Sky Regional Council, He is now the Executive Director of Mid-Carolina Council of Governments, (828) 772-7947 (cell)

Performance Audit of Nash-Rocky Mount Schools – Nash County Board of County Commissioners, NC

Contact Information: Zee Lamb, County Manager, Nash County Board of County Commissioners, 120 West Washington Street, Suite 3072, Nashville, North Carolina 27856, (252) 459-9800, zee.lamb@nashcountync.gov

1.3 Qualifications of Project Team

The Evergreen Team is able to fully comprehend the challenges and goals of the Town of Carolina Beach because of our vast understanding of public sector operations, best practices in resource allocation, and measuring processes and performance. The following includes the qualifications of our proposed project team and the department they will review for this efficiency study. Detailed resumes are available upon request.



Project Director (Town Clerk/Planning and Development) – Dr. Linda Recio. Dr. Recio is the President Emeritus of Evergreen Solutions, and has over 30 years of experience working in the public sector and as a consultant. She has directed efficiency reviews/performance audits for Evergreen in the States of North Carolina, South Carolina, Oklahoma, Florida, Massachusetts, Virginia, Washington, Pennsylvania, Ohio, Texas, California, and several other states. For example, In the State of North Carolina, she directed performance/efficiency audits for the following local governments: Burke County, NC; Beaufort County, NC; Wayne County, NC; Lee County, NC; Davie County, NC; Yadkin County, NC; and the North Carolina General Assembly. She has also directed numerous efficiency studies for school districts throughout the country, including many in the Stat of North Carolina.

Early in her career, after serving as a middle school teacher, she worked as a consultant with the Florida Department of Education. While at the Department of Education, Dr. Recio was instrumental in developing the comprehensive audit criteria and data collection instruments utilized for conducting performance audits/reviews in Florida's 67 school districts. Following the development of the audit criteria, she served as team leader for audits that involved examining and evaluating procedures, records, and programs to determine compliance with federal, state, and local rules and regulations; providing assistance to the district administration in correcting deficiencies; adjusting staffing patterns; and assisting school districts in operating efficiently and effectively. She conducted audits in Florida's 67 school districts, including audits of Florida's large school districts of Miami-Dade, Broward, Duval, and Palm Beach County.

Dr. Recio is also an experienced program administrator. With the Florida Department of Education, she administered several special statewide programs, including the Community and Business Involvement Program and the State Compensatory Education Program. Following a 14-year career with the Department of Education, she joined the Leon County School System as an Assistant Superintendent where she was responsible for the district's strategic plan, school board policies and administrative procedures, staff plan, interagency and legislative planning, grants administration, and program evaluation.

For 15 years Dr. Recio was in charge of efficiency and performance audits, strategic planning, and marketing as a Senior Partner with MGT of America, a national consulting firm, where she oversaw many studies with work similar in scope to that which is being asked by the Town of Carolina Beach.

Dr. Recio is the primary author of the Evergreen Solutions Procedures for Conducting Management and Performance Audits of Local Governments and School Districts, as well as Evergreen's Best Practices Manual.

Project Consultant (Human Resources) – Ms. Nancy Berkley. Ms. Berkley is the Vice-President of Evergreen Solutions who has over 30 years human resources experience demonstrating a thorough knowledge of multiple HR disciplines including, staffing reviews, workforce planning and retention, on-boarding, compensation and benefits, employee and labor relations, employee leave administration, voluntary and in-voluntary employee separations, performance management, employee surveys, organizational design and development, organization effectiveness, employee learning, training, and development, employee records administration and retention, and awards and recognition programs. She has consistently enhanced organizational capability by integrating HR with strategic business planning, development and assessment. She has provided individualized executive coaching and led HR team development and high performance teams. She has led corporate change initiatives and built talent-rich organizations by strengthening people and integrating processes and has directed human resources in high-volume, transactional service organizations and high-level, consulting organizations. She has excellent conflict resolution, negotiation, and influencing skills. **She has directed over 200 studies with Evergreen Solutions over the past seven and a half years, including many in the State of North Carolina.** Ms. Berkley possesses expertise in the following HR areas:

- Designing and implementing a shared service, centralized virtual staffing organization, increasing efficiency of staffing function for hiring managers.
- Conceptualizing and implementing complex workforce reduction plans—then redeployed ~50 percent of the affected employees.
- Analyzing and responding to employee relation trends—positively influenced work environments reducing employee complaints by ~90 percent.



RESPONSE TO REQUEST FOR PROPOSALS

- Consulting with senior leaders and successfully leading project teams to develop new policies, programs and tools—including total revision and communication of a company’s HR policies and practices to be in accordance with state and federal laws;
- Creating HR metrics reviews utilizing business goals and human resources information systems data—set improvement goals and developed action plans for unique business requirements.
- Representing companies in state and federal agency reviews, e.g. Office of Federal Contract Compliance Program (OFCCP) reviews—Equal Employment Opportunity Commission (EEOC) charges, workers compensation charges, and unemployment compensation claims.

Ms. Berkley has a Bachelor’s Degree in Psychology from Florida State University.

Project Consultant (Finance) – Ms. Betty Ressel, CPA. Ms. Ressel is a Managing Partner of Ressel and Associates, LLC, located in Austin Texas, who has served on the Evergreen Team for more than eight years. She is a Certified Public Accountant.

Ms. Ressel has served on the Evergreen team for the following projects: a Performance Audit and Financial Review for Lee County Government, NC (Asst. Project Director); a Performance Audit of Nash-Rocky Mount Schools for the Nash County Board of Commissioners, NC; a Performance Audit and Financial Review of Davie County Government, NC; a Performance Audit of the Land of Sky Regional Council, NC; a Performance Audit of the Health Department for Yadkin County, NC; a Feasibility Study for the Consolidation of School Systems within the County of Halifax, NC; a Compensation, Classification, and Benefits Study for Spotsylvania County and Spotsylvania County Public Schools, VA; a Compensation Study for York County, VA; a Comprehensive Audit of Special Education for Virginia Beach City Public Schools; a Temporary Work Assignment and Stipend Study for Goochland County Public Schools, VA; a Classification and Compensation Study for the Prince George County Public Schools, VA; an Efficiency Study for Stafford County Public Schools, VA; a Compensation Study for Roanoke County Public Schools, VA; and Compensation Study for Jefferson County Schools, WV; a Salary Survey for Chapel Hill-Carrboro City Schools, NC; a Performance Audit of the Richland Two School District, SC; Consulting Services for Facility Department Processes for Horry County Schools, SC; a Classification and Compensation Study for Charleston County, SC; a Districtwide Strategic Plan for the Caddo Parish School Board, LA; a Classification and Compensation Study for the City of Amarillo, TX; a Non-Faculty Compensation Review for Austin Community College, TX; Job Classification, Salary Survey, Compensation Plan Study Services for the City of Duncanville, TX; a Job Classification and Compensation Study for the El Paso Community College District, TX; a Classification and Compensation Study for the Lone Star College System, TX; Compensation Consultant Services for Dallas Area Rapid Transit; a Salary Survey for the Los Angeles Unified School District, CA; a Job Classification and Compensation Study for the Davis School District, UT; a Job Analysis, Classification, and Compensation Study for the Ogden City School District, UT; a Classification and Compensation and Equal Pay Study for the City of Albany, OR; a Total Compensation Study for Spokane County, WA; a Compensation Study for the City of Sebring, FL; a Districtwide Job Classification and Compensation Study for the Escambia County School District, FL; Evaluation of the Race to the Top Grant Program for the Florida Department of Education (Team Leader); a Compensation Study for the City of North Miami Beach, FL; a Classification and Compensation Study for the Martin County, FL; an External Audit of Special Education for Broward County Public Schools, FL; a Classification and Compensation Study for Riviera Utilities, AL; a Compensation and Pay Classification Plan Study for the City of Foley, AL; an Organizational, Efficiency, and Effectiveness Study for Manchester Public Schools, CT; a Performance Audit of District Operations for Toledo Public Schools, OH; a Human Resources Department Review/Audit and an Administrative Salary Study for Akron Public Schools, OH; a Compensation and Benefits Study for the Springfield R-12 School District, Missouri, MO; and a Classification and Compensation Study for the Lorain Metropolitan Housing Authority, OH. She has served as the project lead for state-mandated Performance Audits of the Lee County Public Schools, Florida and the Martin County Public Schools, Florida, on behalf of the Office of Program Policy Analysis & Government Accountability (OPPAGA).

Ms. Ressel has participated in and managed 105 efficiency, performance, and academic audits conducted by the Texas Comptroller’s Office in school districts (100) and Higher Education Institutions (5), as well as reviews of state and local governmental agencies.



RESPONSE TO REQUEST FOR PROPOSALS

In addition to directing audits/reviews, Ms. Ressel has personally gathered data for the audits in each of the functional areas, administered surveys, conducted interviews as well as small and large group facilitated sessions as part of the review process, formulated fully supported recommendations and commendations, and has written and edited entire reports.

Project Consultant (Fire and Rescue /Police) – Mr. Tom Maureau. Mr. Tom Maureau is a retired law enforcement Division Commander (27 years) who possesses a unique combination of IT, Law Enforcement, Fire Department, EMS, and Emergency Management expertise developed through numerous Police and Fire Department assignments and as a Florida Registered EMT/Paramedic. Additionally, Mr. Maureau has an MBA in Technology Management and brings an Operations Management/Business Case Analysis approach to all projects.

During his last 10 years of service, Mr. Maureau served as Chief Information Officer (CIO) for Public Safety IT and was the Technical Services Division Commander comprised of Records Management, Crime Analysis, Criminal Intelligence and Property & Evidence. Previous law enforcement assignments include Watch Commander, Criminal Investigations, SWAT, Narcotics/Organized Crime Drug Enforcement Task Force, Armed Robbery Task Force, Career Criminal Unit, Training and Emergency Management.

Subsequent to his retirement, Mr. Maureau developed new skills, experience and expertise from over 13 years' as a consultant to state, city and county agencies and public safety Information Technology companies.

Mr. Maureau has experience in a variety of projects including:

- Strategic planning; gap, risk, and cost benefit analysis
- Leveraging public safety technology systems for maximum operational effectiveness and time efficiency
- Technology Master Plan – Development through implementation
- The procurement, design, configuration, implementation and support of public safety technology systems including CAD, RMS, Mobile, GIS, JMS, Information Sharing, Criminal/Business Intelligence, In-Car Camera/Body Worn Camera, Logging & Recording; and Radio
- 9-1-1/PSAP, Law Enforcement, Fire and EMS operations analysis
- 9-1-1/PSAP consolidation feasibility studies
- PSAP/Public safety staffing analysis
- Project management
- Improvement of public safety software

Mr. Maureau has worked with a wide spectrum of large, medium, and small public safety agencies including New York City, Los Angeles County and City, Boston, Miami-Dade County and City of Milwaukee.

Project Consultant (Fire and Rescue/Police) - Mr. Michael Misrahi. Mr. Misrahi will assist Mr. Maureau in reviewing the efficiency of the Fire and Rescue and Police Departments. He is a Senior Consultant at Evergreen who possesses an academic background in operations management, public safety staffing, and labor relations studies, which is coupled with professional experience analyzing quantitative and qualitative data. He has worked with the firm for more than six years. He is very knowledgeable of the operations of fire and police departments, having worked with more than 100 clients, many of which, that included a police and/or fire in the overall study. Some of the recent large municipalities that included the police department in its study includes the City of Raleigh, NC and City of Orlando, Florida. He has an MBA and a Bachelor's Degree in History from Florida State University.

Project Consultant (Operations/Parks and Recreation) – Dr. Jeff Ling. Dr. Ling is the President of Evergreen Solutions has been with the firm since its inception in 2004. He has more than 25 years consulting experience in the following areas: efficiency reviews; human resources management; performance improvement; process analysis; strategic planning, and organizational design.



Dr. Ling has worked with a multitude of clients on hundreds of engagements across the nation including, work with state and local governments, school districts, institutions of higher education, quasi-governmental agencies, and private industry. He has been instrumental in creating, reviewing, and evaluating the methodology employed by Evergreen Solutions. His background and skill set make him uniquely qualified for assessing organizational critical needs and strategy. He is also an expert in policy development and long-term planning.

A sample of the types of studies Dr. Ling has been involved with include: **Management and Efficiency Reviews.** He developed and employed the methodology for assessing the strategic alignment used by Evergreen Solutions for public sector organizations. He provided guidance as well as feedback regarding future growth, potential cost savings as it relates to the optimization of certain departments for a number of diverse organizations across the country. He has served on the Evergreen Team for several efficiency reviews in the State of North Carolina, including Davie and Lee County. In addition, he directed a management review for the City of Fountain in Colorado which included looking at the optimization of certain departmental functions. **Strategic Planning** – He led a number of research teams on engagements to create strategic visioning. **Classification/Compensation Studies:** He developed the methodology and techniques for organizations to employee for successful data collection and implementation based on internal and external equity needs. **Pay for Performance**– He has provided the framework for many organizations transitioning into goal-based performance evaluation systems or fully functional merit-based pay structures. He understands the importance of a well stratified, objective based review process and has been instrumental in assisting a number of large organizations transition from traditional systems into merit-based pay structures with minimal transitional costs and interruption. He has worked with public works departments and utilities on strategy development, job analysis, staffing, and organizational design in more than 300 organizations.

Dr. Ling holds a Doctorate's Degree from Florida State University in Political Science and has taught courses addressing research methodology, statistical analysis, public management, and political economy at various universities.

Project Consultant (Parks and Recreation) - Dr. Angele Yazbec. Dr. Yazbec is a Consultant with Evergreen who will assist Dr. Ling in reviewing the efficiency of the Parks and Recreation Department. She possesses a Ph.D. in Cognitive Psychology from Florida State University, and has a strong background in quantitative and qualitative analysis. She is able to apply her knowledge and skills as a Consultant for Evergreen through various functions including: designing surveys, conducting market survey research, conducting focus group sessions and interviews, and preparing reports and presentations in a variety of formats for multiple audiences.

Dr. Yazbec also has experience in evaluating the efficiency of service delivery in a variety of public organizations. Some of her recent municipal experience includes: Franklin County, NC; City of Goldsboro, NC; Transylvania County, NC; Charles County Government, MD; Town of Hilton Head Island, SC; Beaufort County, SC; City of Brookhaven, GA; City of Woodstock, GA; City of Dalton, GA; City of Forest Park, GA; City of Duluth, GA; City of Dunwoody, GA; City of Roswell, GA; City of Tybee Island, GA; Lee County Commission, AL; City of Jacksonville Beach, FL; City of Orlando, FL; City of New Smyrna Beach, FL; Town of Surfside, FL; Brazoria County, TX; Hood County, TX; City of Portland, TX; City of Lockhart, TX; City of South Padre Island, TX; and Columbia County, OR.

2) Description of the Firm's Overall Approach to the Project

Evergreen's methodology is organized into the following study areas to ensure that the key criteria are met: Project Initiation; Diagnostic Review; Detailed Review; Analysis and Recommendations; and Presentation and Feedback.

The first step in a study of this type is to develop a comprehensive understanding of the project requirements during the Project Initiation Phase. Our team will meet with key stakeholders including managers, department heads, and council members to gather information leading to a more clearly defined project scope, objectives, and time lines. Next, we will submit a list of needed data items to provide additional background information for use as we conduct research for the study.

The collected data along with additional interviews will be used to conduct a diagnostic review to determine strategic needs, major services areas, functional areas, and major programs (Diagnostic Review Phase). A key deliverable of the diagnostic review is the creation of the overall model of the services provided that serves as the basis for high level analysis and the foundation for lower level analysis.



In addition, the diagnostic review will define the parameters of each service area by describing the following:

- Demand – what is the level of demand per service area?
- Structure – what programs and organizational structure are in use?
- Activities – how is work organized at the process, task, and activity level?
- Resources – what financial, human capital, culture, knowledge, technology, space, and other inputs are in use?

The Detailed Review Phase follows the diagnostic review and includes the operational resource review and optimal utilization elements of the study. The service model tool will be further defined during the detailed review through an analysis of the exact resources utilized and the desired as well as actual outcomes. This process involves linking strategic needs, services, programs, processes, tasks, and activities. By linking tasks with strategic need, costs, and benefits can be calculated.

The Analysis and Recommendation Phase addresses the “gap” between the current state or “as is” and the future state or “to be” and lists the steps or recommendations necessary to close it. How well resources meet strategic needs and if the resources are being maximized is considered as part of the analysis. Linkages between strategic needs, services, and resources will be analyzed with tools that isolate the relative costs and benefits of service areas, programs, processes, and tasks. Some of the tools for analysis include service factoring, resource loading, benchmarking, and best practices modeling. Detailed analysis of operational resources utilization will indicate the desired structure, actual and desired flow of work, workload, service delivery mechanisms, management practices, staffing needs, and policy modifications.

The changes identified in this phase serve as the basis for findings and recommendations. Typically, recommendations address specific elements documented in the gap analysis. In order to make the recommendations implementable, action plans, costs, and responsibility should be assigned to each. The recommendations will be discussed with the Town of Carolina Beach (Town’s) Project Manager to determine the most practical solutions for the respective departments.

The final phase of the study will be to present the findings and recommendations to key stakeholders. A draft report will be prepared that shows the findings and recommendations for review and comment by key stakeholders. After making necessary corrections and edits to the draft report, a final report will be prepared and submitted for review. Once approved, key elements of the final report will be extracted and developed into a presentation that summarizes the project methodology, key project milestones, analytical findings and recommendations.

Detailed Work Plan

PHASE I: PROJECT INITIATION

Task 1.0: Confirm Scope, Objectives and Timing

TASK GOALS

- Develop an understanding of the organization and operations.
- Finalize project work plan, time lines, and deliverables that will lead to the successful accomplishment of all objectives of the study.
- Identify and interview key stakeholders to assess the organization’s operations.
- Prepare changes in the work plan, time lines or deliverables, as appropriate.

TASK ACTIVITIES

- 1.1 Finalize project design, contractual arrangements and schedule on-site arrangements for the study.



RESPONSE TO REQUEST FOR PROPOSALS

- 1.2 Meet on-site with key stakeholders to establish lines of communication and develop an initial assessment of operations in the Town of Carolina Beach. Identify areas of special concern to the key stakeholders.
- 1.3 Identify communication channels, reporting relationships, and responsibilities of project staff.
- 1.4 Review scope of work. Confirm the project objectives, tasks, and time lines.
- 1.5 Review products to be delivered.
- 1.6 Finalize project design and contractual arrangements, and schedule on-site arrangements for the study.
- 1.7 Revise original work plan and finalize the time lines for each project task with the Town's Project Manager. Disseminate revised work plan.
- 1.8 Develop a communication plan to govern the sharing of information in all phases of the project.
- 1.9 Conduct a briefing with key stakeholders, including the Town Manager and elected officials, appointees, directors, and managers regarding the project overview, roles and responsibilities, major deliverables and expected outcomes.

KEY PROJECT MILESTONES

- Identified communication channels and reporting relationships and responsibilities of project staff
- Confirmation of project objectives, tasks and time lines
- Clearly defined expectations for products to be delivered and the scope and form of delivery

PHASE II: DIAGNOSTIC REVIEW

Task 2.0: Collect Data

TASK GOALS

- Collect and review existing studies, reports and other pertinent data.
- Identify strategic needs and service areas.
- Identify concerns and clarify duties and responsibilities within the Town of Carolina Beach.

TASK ACTIVITIES

- 2.1 Meet with the Town's Project Manager for the Town of Carolina Beach and determine available and/or previously collected resources.
- 2.2 Obtain and analyze reports and background materials pertinent to the study, including:
 - strategic and department plans, mission, vision, goals, objectives and performance standards;
 - position descriptions;
 - organization charts and flow charts of work processes;
 - current and prior year's departmental budgets (previous two years);
 - independent financial audits;
 - recent financial audits and internal audit reports;



- expenditure reports;
 - staffing data that reflects resource allocation and utilization;
 - administrative and financial policies, procedures and practices;
 - personnel policies, procedures and practices;
 - current workload and workload trend information;
 - service level reports including performance measures;
 - citizen feedback or assessments;
 - operating statistics; and
 - other relevant data that may impact the findings and conclusions of this study.
- 2.3 Review current and past organizational structures and staffing levels.
- 2.4 Review and summarize current services provided and staff workloads for all departments both in the off-season (winter) and during the summer tourist season.
- 2.5 Create a draft list of strategic needs and service areas for the Town and share with the Town's Project Manager.
- 2.6 Revise the draft list of strategic needs and service areas based on feedback from the Town's Project Manager.
- 2.7 Design service model to be completed in the remainder of the phase based on the strategic needs and service areas.

KEY PROJECT MILESTONES

- Collection of existing data pertinent to this study
- Summary of high level strategic needs and services areas
- Framework for service model

Task 3.0: Document and Review Existing Organization and Operations

TASK GOALS

- Review current operations in the Town of Carolina Beach.
- Identify functional areas and major programs.
- Determine what is working well with the Town's current organizational structure and staffing levels, and determine the areas that may need improvement.

TASK ACTIVITIES

- 3.1 Interview key staff and stakeholders, identified in conjunction with the Town's Project Manager, to validate strategic needs and service areas, clarify duties and responsibilities, document current functional areas, summarize major programs, and answer specific questions regarding departmental organization and operations to assure that a valid understanding of the Town of Carolina Beach.
- 3.2 Develop, issues, and collect an employee survey that identifies the strengths, weaknesses, opportunities, and threats of the organization as well as asks about activities and resources. The survey can be web or paper-based, and will target all Town employees included in the study. The survey will be used to assess the health of the organization's culture, internal relationships, and attitudes towards the workplace.



RESPONSE TO REQUEST FOR PROPOSALS

- 3.3 Analyzed the survey data and create a profile of the Town of Carolina Beach as well as functional area levels that includes activities and resources.
- 3.4 Assign functional areas and major programs to the specific strategic needs and service areas, and weight the allocated resources. Review the associated activities for consistency and feasibility.
- 3.5 Update the service model and provide it to the Town's Project Manager for review and feedback.
- 3.6 Develop written profile for each service area that includes:
 - **Demand** – What is the level of demand per service area by internal and external customers?
 - **Structure** – What programs and organizational structure are in use and what other approaches have been utilized?
 - **Activities** – How is work organized at the process, task, and activity level?
 - **Resources** – What financial, human capital, culture, knowledge, technology, space, and other inputs are in use?
- 3.7 Prepare and submit summary of diagnostic review findings highlighting strategic needs, major services areas, functional areas, and major programs.
- 3.8 Discuss the results with the Town's Project Manager and other staff associated with the project to validate the results.

KEY PROJECT MILESTONES

- Completion of interviews
- Summary of employee survey results
- Completion of major sections of the service model
- Preliminary summary of operations

PHASE III: IN-DEPTH REVIEW

Task 4.0: Determine Operational Requirements and Best Practice Research

TASK GOALS

- Determine the major federal, state, and local requirements for each service, functional, and program area.
- Identify best practices that can be applied to the Town of Carolina Beach.
- Research best practices by each service, functional, and program area.
- Create a document that summarizes requirements and operational expectations.

TASK ACTIVITIES

- 4.1 Discuss with the Town's Project Manager the plan for reviewing the Town's operational requirements.



- 4.2 Conduct research on the major federal, state, and local requirements.
- 4.3 Create a detailed document which summarizes the major requirements by service, functional, and program area. The document will include a requirements matrix that can be readily used during later phases and discussion purposes.
- 4.4 Conduct best practices review for each service, functional and program area.
- 4.5 Assess the extent to which best practices could be applied to the Town of Carolina Beach.
- 4.6 Develop a list of possible improvements based on results of the best practices review.
- 4.7 Create a best practice matrix for reference in later phases.
- 4.8 Discuss the results with the Town's Project Manager.

KEY PROJECT MILESTONES

- Requirements matrix and document
- Best practice matrix

Task 5.0: Conduct Management, Organizational Structure, and Efficiency Review

TASK GOALS

- Assess linkage between resources, processes, and current outcomes.
- Collect relevant benchmarks for all operational phases.
- Determine areas where the Town exceeds or lags comparable benchmarks.
- Define the current and desired state of the Town.

TASK ACTIVITIES

- 5.1 Review the service model that includes strategic needs, service areas, functional areas, and major programs with the Town's Project Manager before beginning this task.
- 5.2 Discuss with and receive feedback from the Project Manager about the rating tools to be utilized during this task. Make any requested adjustments.
- 5.3 Conduct interviews and focus groups with managers and employees to identify the exact resources, processes utilized, supporting activities or tasks, and the desired as well as actual outcomes.
- 5.4 Compare and contrast the Town's organizational structure, services, and staffing levels with other similar sized cities in North Carolina and other industry staffing standards if available.
- 5.5 Review current and future Town tax structure to other towns of similar size and makeup.
- 5.6 Collect secondary benchmark data for each major element of a service operation: input, utilization, and outcomes.
- 5.7 If necessary, contact representatives of the benchmark agencies to identify the appropriate contact person(s).
- 5.8 Request benchmark data for comparison and integrate into the secondary data database.



RESPONSE TO REQUEST FOR PROPOSALS

- 5.9 Compare and contrast operational benchmark information such as staffing, staff relative to workload, function staff relative to total staff, customer satisfaction levels and uses of technology as well as operational elements such as inputs, utilization results, and outcomes.
- 5.10 Create a matrix that illustrates the Town's performance ratings by service, functional, and program area compared to the benchmark data.
- 5.11 Review benchmark data and legal requirements related to service offerings, availability, and levels based on the requirements matrix that was based on discussion with managers.
- 5.12 Review current and future Town services and workloads to determine the most effective and efficient management and organizational structure to meet the demands and expectations of elected officials, Town residents, business owners, and vacationers.
- 5.13 Identify current and desired level of outcomes of department operations and performance gaps based on the survey results, self evaluations, and benchmark data.
- 5.14 Discuss with managers the Town's desired state in comparison to where their service, functional, and operational area outcomes are currently. Categorize comments into: required by federal, state, or local law; high demand from citizens; or low demand from citizens.
- 5.15 Determine root causes and categorize findings into subgroups by service, functional, and program area.
- 5.16 Create a document summarizing information from this task.
- 5.17 Review findings with Project Manager for comment and approval.

KEY PROJECT MILESTONES

- Updated service model
- Benchmark identification and determination of key performance measures
- Benchmark database
- Benchmark matrix results
- Summary document of findings

PHASE IV: PROJECT REPORTING

Task 6.0: Conduct Gap Analysis and Make Recommendations

TASK GOALS

- Review policies and procedures used by the Town of Carolina Beach.
- Evaluate performance and management structure.
- Assess resource alignment.

TASK ACTIVITIES

- 6.1 Review findings document from the previous task.



- 6.2 Create a matrix that identifies all gaps between the current and desired operations of the Town.
- 6.3 Conduct detailed efficiency and effectiveness analysis of the service, functional, and program areas. Include in the analysis the following elements:
 - objectives, priorities, and programs of the department;
 - current workload and workload trend information;
 - services and service levels provided by each organizational unit;
 - activity and task assignments;
 - staffing level and needs;
 - communications and workflow among the various Town departments;
 - the maximization of efficiency of existing resources;
 - operational cost per unit produced or outcome obtained; and
 - major functions, program, and work tasks improvements.
- 6.4 Identify areas of missing services, duplicate services, overlapping services, and potential opportunities and update the gap matrix.
- 6.5 Determine the best overall structure for the Town of Carolina Beach.
- 6.6 Create several proposed organizational structures to address the Town's needs. Determine the span of control and resource allocations necessary.
- 6.7 Estimate the overall resource and cost savings for each alternative.
- 6.8 Assign each previously identified gap a priority based on the cost and benefit analysis.
- 6.9 Select the best option for implementation.
- 6.10 Write recommendations and action plans for the highest priority areas.
- 6.11 Provide details on the action plan that includes a time line, resources needed, and assigned roles.
- 6.12 Identify if the recommendation is linked to another and how they are linked.
- 6.13 Create a summary document that links recommendations and outcomes from the study.
- 6.14 Discuss the recommendations with the Town's Project Manager, and provide a briefing to other stakeholders as designated.
- 6.15 Identify performance measures that may result in assessing the effectiveness of those recommendations that are implemented.

KEY PROJECT MILESTONES

- Efficiency and effectiveness analysis
- Updated gap analysis matrix
- List of potential improvements
- Recommendations and detailed action plans
- Performance measures to ensure recommendations are implemented



Task 7.0: Prepare Draft and Final Reports

TASK GOALS

- Prepare draft report.
- Prepare final report.
- Make presentation.

TASK ACTIVITIES

- 7.1 Prepare draft report of findings and recommendations.
- 7.2 Submit draft report.
- 7.3 Meet with Town Manager, Town’s Project Manager, and other key stakeholders, as appropriate, to review the draft report and to verify the accuracy of the findings.
- 7.4 Based on the comments on the initial report, make appropriate revisions.
- 7.5 Prepare final report.
- 7.6 Present final report.

KEY PROJECT MILESTONES

- Draft report
- Final report
- Final presentation

3. Assistance from Town Staff and Elected Officials

We will look to the Town’s staff for assistance throughout the duration of the project; however, we suspect most of the time that we will need staff involvement will occur near the initial commencement of work and will be fairly minimal. Evergreen Solutions will want a Project Manager to be designated at the Town office who would be our central point of contact. This will require more frequent interaction and involvement with Evergreen’s consultant team. As far as what will be needed from elected officials, we would expect only their participation in a one-hour interview during the onset of the project in order to gather information necessary to complete the project effectively and thereby deliver sound recommendations.

Some of the functions we anticipate needing assistance from Town staff will include: providing requested data and documents; meeting in-person with our consulting team when they are on-site in the Town of Carolina Beach; assisting with logistics and arranging space for interviews, focus groups, and meetings; facilitating components of the project communication plan—such as employee email lists, contact information, and other relevant data; reviewing interim deliverables and providing feedback; and resolving outstanding project issues with identifying supplemental information.

While the data collection and outreach coordination will represent the majority of the staff time that would be requested by Evergreen Solutions, we anticipate that overall staff time dedicated to the project will be minor—approximately three percent or less of total project hours.



In addition, Evergreen Solutions values feedback and will look to the Town's Project Manager and other decision makers for guidance at different milestones throughout the project.

4. Detailed Timeline

Evergreen Solutions possesses the staff, skills, and tools to complete the requested study for the Town of Carolina Beach and deliver final recommendations in four months. This time line correspond to the tasks and deliverables identified in our detailed work plan in **Section 2**. This time line is based on a tentative start date of July 1, 2020, and a completion date of October 31, 2020. This time line can be modified in any way to best meet the needs of the Town of Carolina Beach.

5. Deliverables

The following includes all of the deliverables that will result from the study:

- Identified communication channels and reporting relationships and responsibilities of project staff
- Confirmation of project objectives, tasks and time lines
- Clearly defined expectations for products to be delivered and the scope and form of delivery
- Collection of existing data pertinent to this study
- Summary of high level strategic needs and services areas
- Framework for service model
- Completion of interviews
- Summary of employee survey results
- Completion of major sections of the service model
- Preliminary summary of operations
- Requirements matrix and document
- Best practice matrix
- Updated service model
- Benchmark identification and determination of key performance measures
- Benchmark database
- Benchmark matrix results
- Summary document of findings
- Efficiency and effectiveness analysis
- Updated gap analysis matrix
- List of potential improvements
- Recommendations and detailed action plans
- Performance measures to ensure recommendations are implemented
- Draft and final report
- Final presentation

6. Proof of Insurance and Disclosure of any Litigation

We have attached a certificate of insurance naming the Town of Carolina Beach as the certificate holder in the **Appendix**. There has been no legal action taken against the firm nor is there any pending litigation.

7. Staffing Continuity

We at Evergreen Solutions pride ourselves on providing continuity of service and implementing quality control procedures to ensure a successful study. Our workload is never too heavy so as to compromise the quality of any project we are on contract to complete or place undue stress on our project team. Should Evergreen Solutions be



awarded this contract we give you our word that our consultants will be available to Town staff whenever they are needed to answer any questions regarding project deliverables.

8. Preliminary Cost Proposal

Evergreen Solutions is committed to providing the highest quality consulting services to our client partners for a reasonable price. Evergreen Solutions is fortunate that our overhead is minimal and our expenses are reasonable so we can pass that cost savings on to our clients. Our total, not-to-exceed, fixed fee to complete the study is **\$30,000**. This total cost is all inclusive, and includes travel costs, fringe benefits, indirect cost (overhead), and all other out-of-pocket expenses.

We are willing to negotiate the time, scope, and cost of the basic tasks, or any other options that the Town of Carolina Beach wishes to identify. Evergreen Solutions federal employer identification number is 20-1833438.



Appendix:
Certificate of Insurance



