



February 1, 2026

**To:** Michael McCoy, Deputy City Manager

**From:** Sarah Schirmer, Managing Director

**RE:** City of Stonecrest Finance Department Operational Assessment

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Based on discussions with you about the City of Stonecrest's desire to enhance the Finance Department's operations, we are pleased to submit this proposed scope of services to conduct a comprehensive assessment and provide concrete, actionable recommendations for continuous improvement. At the completion of PFM's assessment, the City will be able to define its indicators of success for the Finance Department and make organizational and process improvements that will strengthen its core financial operations and maintain sound governance.

The work on this project will include a focused scope of services primarily comprised of benchmarking, stakeholder interviews and process mapping, including in person support. Following completion of these urgent tasks, the City may consider a Phase II of services to include targeted implementation support to ensure that recommended improvements are successfully put into practice.

### **About PFM**

With offices in Atlanta, Huntsville, Memphis, and New Orleans, PFM works closely with local government clients across the South. Our Management and Budget Consulting practice (part of PFM Group Consulting, or PFMGC) specializes in organizational assessments and operational reviews for municipal finance departments. Our team has completed numerous engagements for cities across the country focused on evaluating finance, budget, and purchasing functions, and developing practical, implementable recommendations.

### **Deep Local Government Experience**

PFM offers our clients a unique advantage: a deep understanding of the ways in which local government finance, budgeting and operations intersect in practice. This knowledge is proven by our decades-long track record of helping local government leaders as they address complex operational and financial challenges. Many members of our consulting practice joined PFM after serving in critical local and state government leadership roles.

Our experience spans finance-related initiatives that address both operational and financial needs – from developing policies and guiding documents, to assessing organizational processes, analyzing financial performance, and informing strategic and long-term financial forecasts. This work connects how finance departments operate in practice with how financial decisions are planned, evaluated, and communicated. Through our ongoing work with local governments across the U.S., we bring current, real-world insights into effective finance department structures and management practices. PFM's national presence and extensive public sector network further enhance our ability to identify best practices and support successful implementation tailored to each client's needs.



## **Scope of Services**

We always begin our engagements with client dialogue, a project kick-off meeting, and an initial discussion of information needs. The kick-off meeting provides an opportunity to confirm the project approach and stakeholder engagement strategy. Our approach will emphasize listening, observation, and dialogue with staff to understand how work is currently performed.

### Stakeholder Engagement and Process Mapping

Following the kick-off meeting, we will conduct stakeholder interviews to establish a clear understanding of current operations. This work will be structured interviews with Finance and Purchasing staff, department leadership, and key internal stakeholders. Interviews will focus on clarifying roles and responsibilities, understanding workload demands and communication patterns, and identifying operational pain points. We will conduct these interviews in person and virtually.

As part of these discussions, staff will be asked to walk through how routine tasks are executed in practice. These walkthroughs will allow us to document the step-by-step processes currently in place, what we refer to as process mapping. The resulting process maps will provide a visual representation of current workflows and serve as a foundation for identifying inefficiencies and developing practical recommendations.

As part of the Finance operational assessment, we will incorporate a high-level review of the City's management of Special Purpose Local Option Sales Tax (SPLOST) revenues and expenditures. This work will be integrated into stakeholder interviews and process discussions with Finance staff and relevant departments involved in SPLOST planning, budgeting, tracking, and reporting. The review will focus on processes, roles, and governance structures, and on alignment with common practices used by peer governments in Georgia.

### Benchmarking Analysis

In parallel with stakeholder interviews and process mapping, we will conduct a high-level benchmarking exercise to compare the City's Finance Department's organizational structure and responsibilities to peer jurisdictions. We will coordinate with the City to identify six appropriate comparators in the State of Georgia and nationally, as relevant. The benchmarking analysis will focus on the strengths and weaknesses of the staffing approaches used in other jurisdictions to inform our recommendations.

### Findings and Recommendations

Building on information gathered through stakeholder interviews, process mapping, and benchmarking, we will synthesize our observations into a clear set of findings. Based on these findings, we will develop actionable, prioritized recommendations to improve operational consistency and effectiveness within Finance.

We will present our major findings and recommendations in a brief memo that serves as the final deliverable, summarizing benchmarking comparisons, current state challenges, and prioritized



opportunities to improve efficiency while achieving the City's and the Department's strategic and operational goals.

Following completion of the assessment, the City may engage us for targeted implementation support as a Phase II of this effort to help ensure that recommended improvements are successfully put into practice. Implementation support could include developing standard operating procedures, facilitating process redesign workshops, or other activities identified as priorities during the assessment phase.

### **Project Team**

The PFMGC team will be led by Sarah Schirmer, Managing Director, and Ashley Anyu, Senior Managing Consultant will serve as the day-to-day Project Manager.

#### **Sarah Schirmer, Managing Director, Engagement Manager**

Sarah is the Executive Director of PFMGC's Center for Justice & Safety Finance and brings to PFM more than 15 years of experience working in and with local government. She supports government clients with budget and public safety priorities that bridge policy, finance, and operations including organizational and operational assessments, performance management, and policy improvements. In the municipal budgeting and organizational assessment space, Sarah recently led development of the FY2026 budget in New Orleans, LA for Mayor-elect Helena Moreno's transition team, a multi-year financial planning process and Finance Department organizational and process assessment in Roanoke, VA, and an organizational assessment of the Cobb County, GA police and human resources departments.

Prior to joining PFM, Sarah was the Criminal Justice Policy Advisor to New Orleans Mayor Mitch Landrieu, where she was responsible for cross-agency coordination of the mayor's priorities for the criminal and juvenile justice systems. Sarah started her career with the New York City Office of Management and Budget as a budget liaison to the City's five district attorneys and New York Police Department.

Sarah holds a B.A in Political Science from Temple University and an M.P.A. from Cornell University.

#### **Ashley Anyu, Senior Managing Consultant, Project Manager**

Ashley Anyu is a Senior Managing Consultant in PFM's Management and Budget Consulting practice. She provides quantitative, analytical, and research support for PFM's engagements with a focus on fiscally constrained and economically challenged municipalities. Ashley regularly collaborates with senior government officials to assess fiscal conditions, identify risks to fiscal and operational performance, and develop actionable strategies to improve long-term sustainability.

Ashley recently played a lead role in PFM's ongoing work with Marin County, CA, where she supported a comprehensive review of the County's budget policies and procurement processes. This work included benchmarking Marin County's policies and practices against peer jurisdictions, assessing the alignment between adopted policies and day-to-day operations, and identifying



opportunities to clarify roles, streamline workflows, and improve consistency and accountability across departments.

Ashley also recently served as a project co-lead for the City of Roanoke, VA's multi-year financial planning engagement, where she led the development of a long-term baseline forecast informed by ten years of historical financial performance. In addition to the financial analysis, she supported organizational and process improvement efforts. In addition to her policy and process improvement work, Ashley has supported several analytical engagements, including select fee studies for the City of Atlanta. Across engagements, her work emphasizes practical implementation, clear documentation, and governance structures that support effective financial management over time.

Ashley holds a B.A in Urban Affairs and Public Policy and an M.P.A., both from the Joseph R. Biden School of Public Policy at the University of Delaware.

### **Timeline**

The engagement is anticipated to be completed within 3 months, with the following general timeline:

- Weeks 1-5 – Current state assessment and stakeholder interviews
- Weeks 6-8 – Benchmarking and staffing assessment
- Weeks 9-12 – Recommendations, roadmap development, and final deliverables

### **Proposed Project Cost**

Based on the project scope described in this memo and proposed timeline, PFM proposes a total project cost of \$74,580, inclusive of travel costs. This proposed cost assumes up to three trips for the project team to conduct interviews in person and review draft process maps in person. If the City wishes to engage PFM for Phase II implementation support, we would be happy to prepare a new scope of work and associated cost for that body of work.