# Proposal to Conduct a Benchmark and Level of Service Study

JOPLIN, MISSOURI

**Original**

January 25, 2022

matrix consulting group

# Table of Contents


| | | |
|---|---|---|
| | Letter of Transmittal | i |
| 1. | Company Profile | 1 |
| 2. | Organizational Structure, Project Team and Resumes | 3 |
| 3. | Experience and Qualifications | 12 |
| 4. | References | 17 |
| 5. | Proposed Task Plan | 19 |
| 6. | Timeline to Conduct Study | 28 |
| 7. | Project Cost | 29 |

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consulting group

January 25, 2022

Lynden Lawson
Assistant Public Works Director
City of Joplin
602 South Main Street
Joplin, MO 64801

Dear Mr. Lawson:

The Matrix Consulting Group is pleased to present our proposal to conduct a benchmark and level of service study for the City of Joplin. Our proposal is based on our review of the City's request for proposal, our research on the City's operations, and our extensive experience analyzing other similar operations in Missouri and across the country.

We understand that the City is seeking a comprehensive assessment of service levels, including staffing implications and operational efficiencies, for the organization. A key component of this study is evaluating the service levels provided and aligning these for a sustainable future state that takes into consideration community input and service levels of comparable communities.

We have proposed a highly experienced project team including members who have previously served in local government in executive management positions as well as career consultants with hundreds of studies as experience. Our key qualifications are:

- Our exclusive market and service focus is on assisting local governments with staffing and operational assessments. Since being founded in 2002, our project team has conducted over 90 organization-wide studies. Representative clients are provided in the following table:

| | | |
|---|---|---|
| Brattleboro, Vermont | Johnson County, Kansas | Rancho Palos Verdes, CA |
| Carroll County, NH | Monroe County, Michigan | Roseville, California |
| DeKalb County, Georgia | Montpelier, Vermont | Schertz, Texas |
| Deltona, Florida | Orland Park, Illinois | Sunnyvale, California |
| Greenbelt, Maryland | Orting, Washington | Tigard, Oregon |
| Gulf Shores, Alabama | Portage, Michigan | Tinley Park, Illinois |
| Half Moon Bay, California | Rancho Mirage, California | Waxhaw, North Carolina |

We are currently completing similar studies for Coventry, RI and Takoma Park, MD.

- In addition, we have completed over 1,400 departmental studies covering every area of local government operations.

- Our project team consists of highly experienced subject matter experts. Our proposed project manager has prior local government experience in addition to his extensive consulting experience. Our proposed project team members are all staff with the firm, there are no subcontractors.

We have fully reviewed the issued RFP and agree to all conditions, requirements, and terms outlined. As President of the firm, I am authorized to submit this proposal and execute a contract for services on behalf of the Matrix Consulting Group. Our proposal and pricing will remain valid for at least 120 days from the submittal date.

We appreciate this opportunity to provide a proposal for the City's consideration. I can be reached at either the address and phone number listed in the footer or at rbrady@matrixcg.net.

Richard P. Brady

**Matrix Consulting Group**
Richard Brady, President

# 1. Company Profile

This section of our proposal will provide an overview of the Matrix Consulting Group and our experience conducting similar organizational-wide operations including benchmarking and level of service evaluations.

## 1. About the Matrix Consulting Group

The Matrix Consulting Group is a management consulting firm dedicated to providing quality analytical assistance to local government. Our company was formed in 2002 by experienced consultants in order to pursue an operating model in which analytical work is performed by senior level staff. Our firm can be summarized as follows:

- We are incorporated in California with a Bay Area headquarters and have regional offices in Edwardsville (St. Louis metro area) (IL), Charlotte (NC), Dallas-Fort Worth (TX), Fort Myers (FL), and Portland (OR). It should be noted that we are incorporated in Missouri as a foreign corporation.
- We are comprised of 20 full time and four part time staff.
- While the Matrix Consulting Group provides a variety of analytical services to local government, one of our most significant areas of expertise is in the evaluation of levels of service in a community. We have conducted over 90 organization-wide assessment and over 1,400 department specific studies since our founding

We take a holistic approach to evaluating local government service levels and staffing needs both to meet the current and projected workload.

## 2. Company Profile

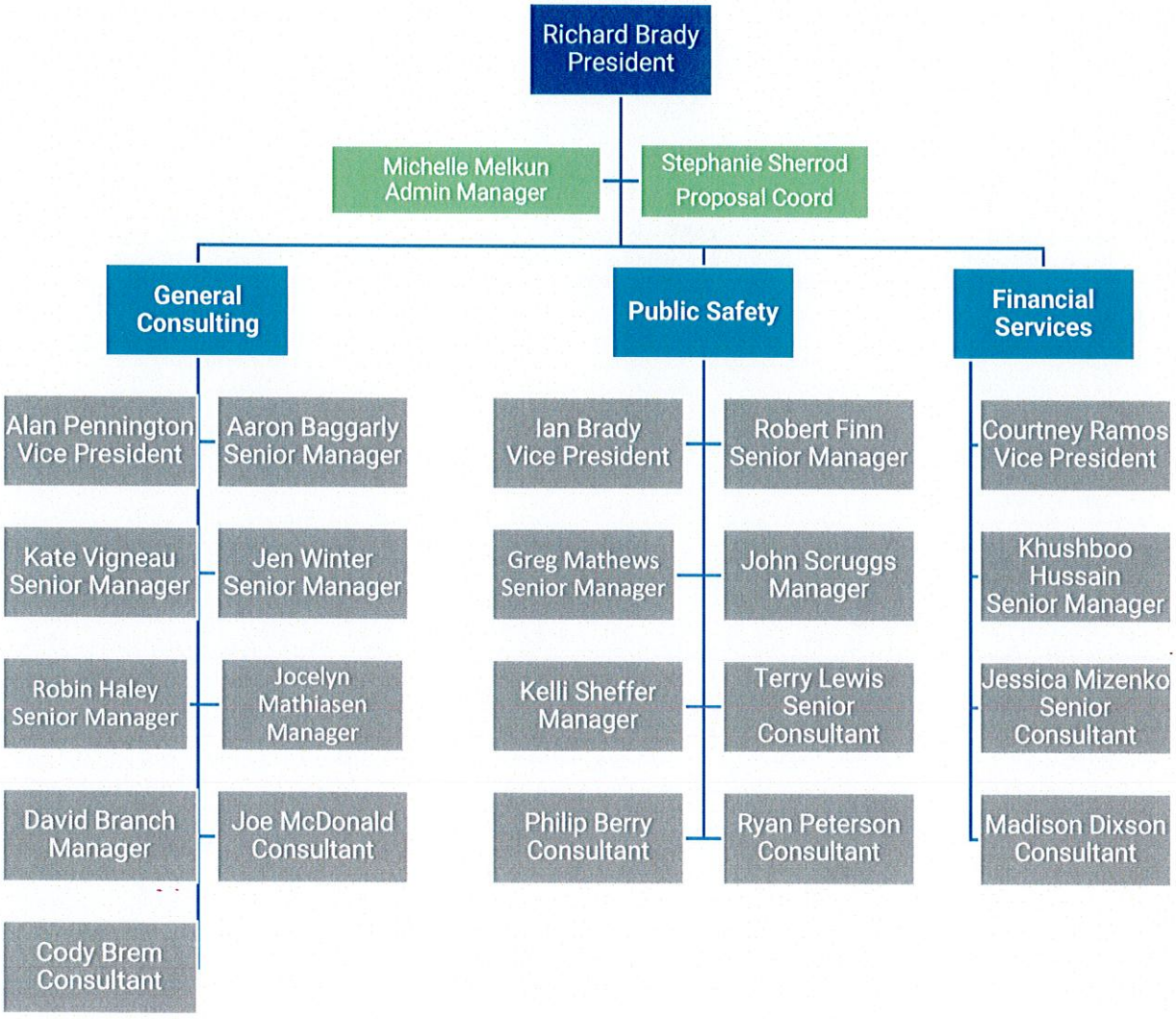
This section of our proposal will outline the requested information for the Matrix Consulting Group.

| | | |
|---|---|---|
| **Firm Information** | Company Name | Matrix Consulting Group, Ltd. |
| | Address | 1650 S Amphlett, Suite 213 San Mateo, CA 94402 |
| | Phone | 650-858-0507 |
| | Fax | 650-397-4050 |
| | Incorporated | State of California in 2003 (a partnership in 2002) |
| | Enterprise Type | C-Corporation |
| | Firm Representative | Richard Brady, President |

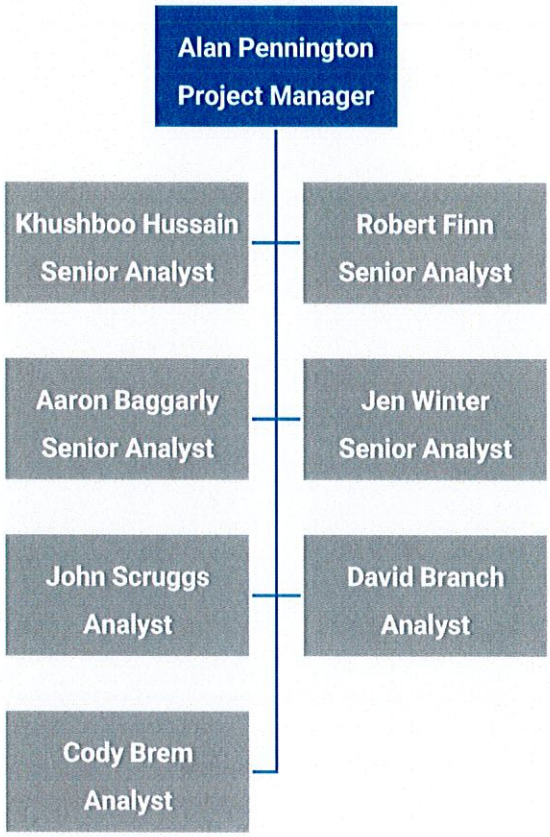
| | | |
|---|---|---|
| | Email | rbrady@matrixcg.net |
| | Phone | 650-823-3174 |
| **Project Manager** | Name | Alan Pennington, Vice President |
| | Email | apennington@matrixcg.net |
| | Phone | 618-795-1995 |
| **Office Locations** | Edwardsville, IL | 101 Southpointe Dr, Suite E Edwardsville, IL 62025<br>Phone: 618-692.9085 |
| | Charlotte, NC | 8022 Providence Road, Suite 500-106 Charlotte, NC 28277<br>Phone: 803-622-9910 |
| | Portland, OR | 329 NE Couch Street, Suite 307<br>Phone: 650-575-5129 |

## 2. Organizational Structure

The Matrix Consulting Group is comprised of three primary teams. Our three teams include a Public Safety, Financial Services, and General Consulting practices. General Consulting includes all local government functions except public safety, cost allocation, and fee schedule studies. The proposed project team for this study will be comprised of members of our General Consulting Group with representatives from our Public Safety team included for subject matter expertise. The following graphic outlines the organizational structure of the Matrix Consulting Group.



The following graphic shows are proposed project team on this engagement.




The following table outlines the specific areas that each individual would primarily focus on during this engagement.

| Employee | Service Area |
|---|---|
| Alan Pennington | Administrative |
| Khushboo Hussain | Finance / Admin |
| Aaron Baggarly | Community Development |
| Jen Winter | Public Works / Infrastructure |
| John Scruggs | Police |
| Robert Finn | Fire |
| David Branch | Administrative / Community Services |
| Cody Brem | Support to all team members |

Resumes for senior staff are provided in the following pages.

# ALAN PENNINGTON

VICE PRESIDENT, MATRIX CONSULTING GROUP

**Alan Pennington** leads our General Consulting Practice which includes organization-wide assessment. He has served as the Project Manager or Lead Analyst on over 300 local government studies since joining the firm including many for smaller organizations.

Alan's relevant experience include:

- Completed over 300 local government assessments including almost two dozen organization-wide assessments.
- Extensive experience leading benchmarking efforts to understand how municipalities compare to peer local governments in staffing, operational practices, and service delivery approach.
- Extensive experience evaluating parks and recreation services including ensuring maintenance of existing programs and facilities, and opportunities to expand to meet identified community needs in a financially sustainable manner.

## Experience Highlights

**Tigard, OR**: Alan was the Project Manager on this Performance Audit for the City of Tigard that evaluated all operational aspects of the City and included the development of a staffing model based upon adjusted services and service levels, recommendations for operational improvements, and the development of performance indicators for each functional area. This study was undertaken in advance of a ballot measure to increase funding to support required municipal operations. We provided an implementation plan that structured all recommendations based upon priority (impact on operations) and the timeframe for implementation (developed to align with organizational capacity). The report and recommendations were fully adopted by the City Council.

**DeKalb County, GA:** Alan was a senior analyst on this project which evaluated the organizational functions under the control of the County's Chief Executive. The focus of the study was on identifying process improvement opportunities, staffing changes and organizational structure changes. The impetus of the study was the potential incorporation of a significant portion of the County which would have resulted in substantial revenue loss and the need for the County to reduce services. Alan focused primarily on administrative and non-public safety function operations. The study examined in detail the financial and organizational impacts associated with large portions of the County incorporating into new cities.

**Role on This Engagement:**
Alan will serve as a project manager and senior analyst.

### Relevant Clients:

| | |
|---|---|
| CA | Half Moon Bay |
| CA | Rancho Mirage |
| CA | Rancho Palos Verdes |
| CA | Roseville |
| CO | Fort Morgan |
| FL | St. Cloud |
| GA | DeKalb County |
| IL | Orland Park |
| IL | Tinley Park |
| MA | Orleans |
| MA | Framingham |
| MI | Portage |
| MO | Raymore |
| NC | Waxhaw |
| NH | Carroll County |
| NJ | Franklin Township |
| NJ | West Milford |
| OR | Tigard |
| PA | Mt. Lebanon |
| TX | Ft. Worth |
| TX | Schertz |
| VT | Montpelier |

### Years of Consulting Experience: 14

### Years of Government Experience: 13

### Education:

BA, University of Maine, Public Management.

MPA, University of Maine

### Professional Association:

Association of Local Government Auditors (ALGA)

International City-County Management Association (ICMA)

## AARON BAGGARLY, AICP

SENIOR MANAGER, MATRIX CONSULTING GROUP

**Aaron Baggarly** has served as an analyst on a wide variety of local government studies. Aaron has extensive experience conducting organizational, operational, and staffing assessments for local government operations covering a wide variety of government operations in his 14 years of experience. Prior to joining the firm, he was a Planning Manager in Oklahoma.

Relevant experience highlights include:

- Completed over 120 studies for local government entities, with over 45 studies for administrative and/or organizational wide staffing and operational assessments.
- Analysis focuses on staffing and workload, process improvement, organizational review, and needs assessments.
- Has conducted over 50 master and strategic planning projects for all facets of local government operations.

### Experience Highlights

Gulf Shores, AL: Aaron was the project manager to develop a staffing and facility needs assessment to guide the City over the next 20 years. Key tasks of this project included:

- Reviewing all City operations and projecting future workload and staffing needs to support the fast-growing community.
- Developed 20-year staffing and space projections to meet future facility needs.
- Developed multiple scenarios to address the 20-year space and facility needs of the City.

Fort Worth, TX: Aaron was a lead analyst on this engagement of the Code Compliance Department which included a current and projected staffing assessment of Health, Environmental, Code Enforcement, Solid Waste, and Animal Control operations. Key tasks and recommendations included:

- Analyzed workload and service levels to develop staffing models to address current and future staffing needs.
- Recommended several changes to organizational structure to provide better supervisor oversight and reasonable spans of control to help enhance customer service levels.
- Review current technology systems and identified challenges that impact operations. Provided recommendations to increase technology and operational efficiencies.

**Role on This Engagement:**

Relevant Clients:

| | |
|---|---|
| AL | Gulf Shores |
| AZ | Buckeye |
| CA | Menlo Park |
| CA | Milpitas |
| CA | San Mateo County |
| CA | Ventura |
| FL | Miami Beach |
| FL | Toho Water Auth. |
| FL | Fort Myers |
| FL | Monroe County |
| FL | Pasco County |
| GA | East Point |
| IL | Orland Park |
| IL | Tinley Park |
| MA | Boston |
| MT | Billings |
| NC | Rowan County |
| NC | Wake County |
| NY | Mamaroneck |
| PA | Franklin County |
| TX | Dallas |
| TX | Flower Mound |
| TX | Fort Worth |
| UT | Grand County |
| VA | Blacksburg |
| VT | Burlington |
| WA | Everett |
| WI | Waukesha County |

Years of Experience: 14

Education:

BS, Appalachian State University, Community and Regional Planning, Minor in GIS.

Professional Association:

American Institute of Certified Planners (AICP)

American Planning Association

Aaron will serve as a senior analyst on this engagement.

## JEN WINTER, P.E.

SENIOR MANAGER, MATRIX CONSULTING GROUP

**Jen Winter** just joined our firm to lead our Public Works and Infrastructure Practice area. She leads all public works studies including asset management, engineering, streets, public utilities, and related services.

Prior to joining Matrix Jen served within local government as the Public Works Director for the City of Cedar Rapids, Iowa. She has also previously served as the Regional Director for an engineering consulting firm. Her local government experience includes:

Relevant Clients:

| | |
|---|---|
| CA | Vacaville |
| CA | Marin County |
| CA | Santa Barbara |
| NC | Fayetteville |

- Strategic planning, organizational and staffing assessments, data, and workload analysis, needs assessments, public engagement, and best management practices evaluation and implementation.
- Process studies within public works and development activities, organizational review, and process evaluation and reengineering.
- Asset management strategies critical to the planning and measurement of infrastructure maintenance, repair, and replacement.
- Extensive training in and experience implementing organizational health initiatives.
- Crises management and disaster response.

## Experience Highlights

Cedar Rapids, IA: Jen led the implementation of the organizational and operational review for the City of Cedar Rapids Public Works Department which included engineering, streets, traffic, stormwater, sanitary sewer, real estate, and right of way management.

- Authored the departments first Strategic Plan to align the department goals with those of the City Council.
- Reorganized the department to create divisions with better aligned teams and opportunities for career development and succession planning.
- Outlined process improvements for a more predictable and efficient work process.
- Implemented and participated in emergency response training and development. Experience with multiple federally declared disasters.
- Developed and implemented an asset management system for all public infrastructure.
- Introduced and led formal project management training.

**Role on This Engagement:** Jen will serve as a Senior Analyst on this engagement.

Years of Experience: 24

Education:

BS, Iowa State University, Civil Engineering

Professional Association:

American Public Works Association (APWA)

APWA Center for Sustainability (Past Chair)

APWA Iowa Chapter Board Member

# KHUSHBOO HUSSAIN

SENIOR MANAGER, MATRIX CONSULTING GROUP

Relevant Clients:

**Ms. Hussain** is a Senior Manager who manages cost allocation plan, user fee, development impact fee, and cost of service engagements. Her experience with the firm also includes participation in operational audit engagements focusing on reviewing organizational, staffing, and internal processes to enhance development services.

Khushboo's relevant experience include:

- Completed over 100 cost of service studies for clients across the United States.
- Analysis focuses on process flows, staffing structure, workload review, and policy development for planning, building, engineering, and fire prevention services.
- Expertise also includes development of fiscal policies and procedures relating to deposit-based fees and deferred revenues.

## Experience Highlights

Milpitas, CA: Khushboo served as a lead analyst on this engagement, which evaluated both the organizational structure and operational efficiencies of the community development department and its fees for service. Key analysis includes:

- Review of current workflows and staffing levels.
- Modification of current fee schedule to better reflect existing and proposed service levels due to staffing modifications.
- Provided recommendations for staffing a permit coordinator to guide applicants through the development process.

Adelanto, CA: Khushboo served as a project manager on this engagement, which reviewed overhead allocation of indirect costs, determined costs of services, including cannabis licensing and fees, and evaluated impacts associated with new development. Key analysis includes:

- Expanded building permit fees to include permits associated with cannabis-related businesses, i.e., fans, CO2 Infusion System, etc.
- Developed cannabis-related fees covering the annual review of cannabis businesses, including any auditing and compliance components.

**Role on This Engagement:**

Khushboo will serve as an analyst on this engagement, leading interviews and analyzing current policies, procedures, and processes.

AL Gulf Shores
CA Adelanto
CA Downey
CA Fresno
CA Humboldt County
CA Milpitas
CA Mountain View
CA Pasadena
CA Redwood City
CA Sacramento
CA San Clemente
FL Fort Lauderdale
FL Miami Beach
HI Maui County
NC Asheville
OR Ashland
OR Tigard
TX Austin
TX Dallas
TX Flower Mound
WA Lynnwood
WI Dodge County

Years of Experience: 9

Education:

B.A., University of California – San Diego, International Economics

M.A., University of California – San Diego, International Affairs

Professional Association / Certification:

California Society of Municipal Finance Officers

Government Finance Officers Association

Revenue Enhancement Best Practices

# JOHN SCRUGGS

MANAGER, MATRIX CONSULTING GROUP

Relevant Clients:

**John Scruggs** is a manager / analyst on law enforcement, public safety, and criminal justice engagements.

John's relevant experience include:

- Completed over 50 studies for law enforcement, public safety, and criminal justice clients.
- Analysis focuses on operational and staffing review, workload analysis, net annual work hour determination, and alternative scheduling analysis.
- Expertise also includes the evaluation of administrative, dispatch, investigations, patrol, records, and property and evidence functions.
- Retired Captain with 26 years of Law Enforcement Experience.

## Experience Highlights

Kawartha Lakes, Ontario: John served as the lead analyst of the on this engagement which reviewed the current staffing and developed staffing projections for a facilities study. Key recommendations included:

- Identified two patrol positions needed in the next 4 years and six positions over the next 20 years to better meet adopted proactive policing thresholds.
- Identified a shortage of detectives assigned to investigate crimes committed at the Central East Correctional Center.
- Identified an alternative fixed post staffing plan for the jail and a revised shift schedule to increase supervision in the jail.

Kansas City, MO: This study evaluated the staffing needs of the Police Department. Key findings included:

- Opportunity for greater fiscal savings by transitioning 30 positions from sworn to civilian staff, primarily in administrative areas (e.g., finance, records, fleet maintenance, security, IT, and HR).
- Provided insight into alternative organizational structures and span of control in administrative functions.
- Conducting workload analysis to determine staffing needs for non-patrol and investigative units.

### Role on This Engagement:

John will serve as an analyst on this engagement focusing on Police operations.

| | |
|---|---|
| AL | Gulf Shores |
| AZ | Buckeye |
| CA | Los Angeles |
| CA | San Jose |
| CA | Santa Clara |
| FL | St. Cloud |
| KS | Kansas City |
| KS | Wyandotte County |
| MA | Yarmouth |
| MN | Hennepin County |
| MO | Kansas City |
| OR | Tigard |
| PA | Lower Saucon |
| PA | Narberth |
| PA | Upper Macungie |
| NC | Waxhaw |
| NC | Raleigh |
| TX | Denton |
| TX | Fort Worth |
| TX | Glen Heights |
| TX | Lewisville |
| TX | Sunnyvale |
| WA | Monroe |
| WA | Tacoma |
| WI | Dodge County |

Years of Experience: 6

Education:

BA, Portland State University

MPA, Portland State University:

# ROBERT FINN

SENIOR MANAGER, MATRIX CONSULTING GROUP

**ROBERT FINN** Robert Finn is a Senior Manager with the Matrix Consulting Group and previously served as the Chief of the Southlake (TX) Department of Public Safety. Mr. Finn has a strong educational background coupled with a successful track record that includes strategic planning, budgeting, change management, community relations, and building collaborative partnerships. Robert has over 30 years of fire service and consulting experience covering all aspects of the fire service industry.

Robert's relevant experience includes serving the City of Southlake, Texas for 25 years in the following roles:

- Chief of Police (2008 to 2011)
- Chief of Fire Services (2004 to 2008)
- Lieutenant of Professional Standards (1999 to 2004)
- Lieutenant of Training (1995 to 1999)
- Coordinator of Emergency Medical Services (1993 to 1995)
- Firefighter / Driver / Paramedic (1987 to 1993)

**Billerica, MA:** Robert was the lead analyst on this project aimed at an assessment of the Fire Department. Key findings/ achievements of the project:

- Increasing minimum staffing on engine companies to 3 personnel.
- Relocation of a station to improve response times and reduce risk of flooding.
- Elimination of a redundant Captain position.

**Westport, CT:** Robert was the lead analyst on this study develop a strategic plan for the Fire Department. Key findings/achievements include:

- Changes to the deployment model to improve services.
- Improvements to the record keeping and data reporting systems
- Relocating Fire Prevention to centralize the service in the Town.
- Implementing electronic inspection and plan review processes.

Role on This Engagement: Robert will be the lead analyst on this project.

Relevant Clients:

| | |
|---|---|
| AK | Anchorage |
| CA | Big Bear |
| CA | Huntington Beach |
| CA | Mercer County |
| CA | Monterey |
| CO | Mesa County |
| CO | Steamboat Springs |
| CT | Greenwich |
| CT | Westport |
| GA | DeKalb County |
| IA | Davenport |
| MA | Billerica |
| MA | Boston |
| MA | Chelsea |
| MA | Yarmouth |
| MI | Sterling Heights |
| NC | Raleigh |
| NY | Bedford |
| NY | New Rochelle |
| OH | Cleveland |
| TX | Possum Kingdom |
| TX | San Antonio |
| WA | Bellingham |
| WI | Oshkosh |

Years of Experience: 30

Education:

MBA, and BS, Public Safety Administration, Grand Canyon University

Professional Association:

National Fire Protection Association (NFPA)

International Association of Fire Chiefs (IAFC)

Center for Public Safety Excellence (CPSE)

# DAVID BRANCH

MANAGER, MATRIX CONSULTING GROUP

**David Branch** has served as an analyst and project lead on a wide range of government studies covering a variety of county and municipal functions such as human resources, finance and purchasing, public works and utilities, fleet and facilities, parks and recreation, code enforcement, and community development. David has extensive experience conducting organizational, operational, and staffing assessments during his 8 years with our firm.

Relevant experience highlights include:

- Completed over 100 studies for local government entities, including numerous department- and agency-wide assessments.
- Analysis focuses on workload and staffing, organizational structure, asset management, and process improvement using recognized best practices and quantitative metrics.

## Experience Highlights

Tigard, OR: David served as an analyst in this citywide performance audit and operational review, leading the assessments of the community development, parks, and public works departments. The study examined performance measures, staffing, organizational structure, and use of technology. It included:

- Analysis of departments' performance reporting and use of technology, and recommendations for routine level of service benchmarks and the utilization of the existing application processing software.
- Recommendations to routinely track and report on workload, implement an asset management software system, systematize the capital planning process, and enhance the regular collection of stakeholder feedback through a satisfaction survey.

Aurora, CO: David was the lead analyst and point of contact for the code enforcement portion of this two-part study on the City's code enforcement and animal control functions. Key elements included:

- Analysis of proactive and complaint-based workload by geographical location, and recommendations of new geographic area assignments to equalize workloads.
- Assessment of technology utilization in the division and recommendation for expanded use of the City's code enforcement case management system.
- Evaluation of and recommendations for appropriate code enforcement and graffiti removal staffing to

**Role on This Engagement:**

David will serve as an analyst on this engagement.

Relevant Clients:

| | |
|---|---|
| AZ | Buckeye |
| CA | Riverside |
| CA | Watsonville |
| CO | Aurora |
| CO | Pueblo County |
| FL | Fort Myers |
| GA | Forsyth County |
| IL | Niles |
| IL | Tinley Park |
| IL | Lake County |
| IL | Chatham |
| MA | Haverhill |
| NH | Carroll County |
| NM | Gallup |
| OR | Tigard |
| OR | Tualatin Valley Water |
| PA | Pittsburgh |
| SC | Anderson County |
| TX | Garland |
| TX | Austin |
| UT | Ogden |
| VA | Virginia Beach |
| WI | Rock County |
| WI | Waukesha County |
| WV | Marshall University |

Years of Experience: 8

Education:

BS, University of Southern California; Policy, Management, and Planning.

Professional Association:

American Public Works Association (APWA)

Association of Public Safety Communications Officials (APCO)

# 3. Experience and Qualifications

This section of our proposal will provide an overview of the Matrix Consulting Group experience conducting organizational assessments that include evaluations of level of service, staffing and included benchmarking efforts. We also have evaluated development review processes as part of organization-wide studies and assessments.

## 1. Firm Experience Conducting Similar Organization-wide Assessments.

Our proposed project team has conducted over ninety organization-wide studies since our founding. Notable clients include:

| | | |
|---|---|---|
| Albuquerque, New Mexico | Gulf Shores, Alabama | Rancho Mirage, California |
| Augusta, Georgia | Half Moon Bay, California | Rancho Palos Verdes, CA |
| Avon, Connecticut | Hall County, Georgia | Raymore, Missouri |
| Barstow, California | Johnson County, Kansas | Roseville, California |
| Brattleboro, Vermont | Monroe County, Michigan | Salt Lake County, Utah |
| Carroll County, NH | Monrovia, California | Schertz, Texas |
| Corp. for Public Broadcasting | Montgomery College, MD | St. Cloud, Florida |
| DeKalb County, Georgia | Montpelier, Vermont | Sunnyvale, California |
| Deltona, Florida | Orland Park, Illinois | Tigard, Oregon |
| Franklin Township, NJ | Orleans, Massachusetts | Tinley Park, Illinois |
| Greenbelt, Maryland | Orting, Washington | Waxhaw, North Carolina |
| Groton, Massachusetts | Palos Verdes Estates, CA | West Milford, New Jersey |

We are currently conducting organization-wide studies for Coventry, Rhode Island and Takoma Park, Maryland that include an assessment of community service levels and staffing requirements.

## 2. Firm Experience Conducting Departmental Assessments.

As previously noted, the Matrix Consulting Group has conducted over 1,400 studies since our founding. The following table shows the type and variety of engagements conducted by the firm over just the last three years to demonstrate the depth and breadth of our experience.

| Year | Client | Project Scope Focus |
|---|---|---|
| 2020 | Albany, NY | 911 Project |
| 2020 | Bakersfield, CA | Police Facilities |
| 2020 | Beaufort-Jasper Authority | Fleet Study |
| 2020 | Bexar County, TX | Sheriff's Fleet |

| Year | Client | Project Scope Focus |
|---|---|---|
| 2020 | Christiana Fire Company | Fire Study |
| 2020 | Conshohocken, PA | Police Study |
| 2020 | DFW International Airport | Shift Optimization Study |
| 2020 | Forest Grove, OR | Development Review Study |
| 2020 | Garland, TX | Fleet Study |
| 2020 | Greenwich, CT | Fire Study |
| 2020 | Haverhill, MA | Facilities Study |
| 2020 | Hennepin County, MN | Sheriff's Office Staffing and Facility Study |
| 2020 | Highland Beach, FL | Fire Study |
| 2020 | Kawartha Lakes, ON | Police Facility Study |
| 2020 | Kettering, OH | 911 Study |
| 2020 | La Quinta, CA | Fire Study |
| 2020 | La Quinta, CA | Regional Policing #2 |
| 2020 | Maui County, HI | Development Review Study |
| 2020 | Medina, MN | Fire Study |
| 2020 | Metro Council | Org Study of Facility Operations |
| 2020 | Montgomery County, MD | Performance Management |
| 2020 | Mountain Brook, AL | 911 Study |
| 2020 | Mt. Pleasant, SC | Fleet Study |
| 2020 | NAFA | Fleet Manual |
| 2020 | North County Dispatch | Dispatch Admin Study |
| 2020 | Oklahoma City, OK | Street Maintenance Study |
| 2020 | Ossining, NY | Police Study |
| 2020 | Palm Beach County, FL | 911 Study |
| 2020 | Portage, MI | Organizational Study |
| 2020 | Redmond, WA | Fire Study |
| 2020 | SABIC | Fire Study |
| 2020 | San Carlos Apache Tribe | Police Study |
| 2020 | St. Cloud, FL | Citywide Staffing Assessment |
| 2020 | Stafford County, VA | Fire Study |
| 2020 | Sterling Heights, MI | Fire Dept. Manpower Study |
| 2020 | Suisun, CA | Police Study |
| 2020 | Upper Macungie, PA | Police Recruitment |
| 2020 | Watsonville, CA | Implementation Assistance for Fleet |
| 2019 | Albany, CA | Fire Study |
| 2019 | Bellingham, WA | Fire Department Strategic Plan |
| 2019 | Bloomington, MN | Fleet Operations Evaluation |
| 2019 | Boise Forestry | Parks Study |
| 2019 | Boulder, CO | FAM- Staffing Analysis and Real Estate Services |
| 2019 | BREC | Technical Expert Services |
| 2019 | Buckeye, AZ | Construction and Contracts |
| 2019 | Cabarrus County, NC | Internal Controls Diagnostic Assessment |

| Year | Client | Project Scope Focus |
|---|---|---|
| 2019 | Calistoga, CA | Police Service Alternatives |
| 2019 | Cherry Hill, NJ | Fire Financial Review |
| 2019 | Citrus County, FL | Jail Study |
| 2019 | Clinton, MA | Fire Department EMS Study |
| 2019 | Columbia River, OR | Cooperative Services Study |
| 2019 | Commerce, CA | Police Study |
| 2019 | Denton, TX | Police Study |
| 2019 | Dinwiddie County, VA | Fire Study |
| 2019 | Dodge County | Sheriff's Office Operational and Financial Review |
| 2019 | Edmonton, Alberta | Police Consulting Services |
| 2019 | Flower Mound, TX | Assessment of Development Review Process |
| 2019 | Fremont, CA | Police Study |
| 2019 | Gallup NM | Police Organization |
| 2019 | Gallup, NM | HR and Finance Study |
| 2019 | Gallup, NM | Internal Controls |
| 2019 | Gallup, NM | Public Works Study |
| 2019 | Gallup, NM | Warehousing Audit |
| 2019 | Gulf Shores, AL | Space Needs and Building Program Analysis |
| 2019 | Haverhill, MA | Organizational Assessment of the Highway Division |
| 2019 | Hennepin County, MN | Emergency Management |
| 2019 | INCOG | Fire Consolidation & Automatic Aid Feasibility Study |
| 2019 | Key Biscayne | Fleet |
| 2019 | Kirkland, WA | Fleet Rate Cost Recovery Model |
| 2019 | La Cañada Flintridge, CA | Finance Dept and Internal Controls |
| 2019 | La Quinta Regional, CA | Regional Policing #1 |
| 2019 | La Quinta, CA | Police Study Update |
| 2019 | Lake County, IL | Facilities and Construction Services |
| 2019 | Lebanon, MO | Fire Dept Response Time & Station Location |
| 2019 | Lewisville, TX | Police Staffing and Scheduling |
| 2019 | Littleton, CO | Fleet Replacement Plan |
| 2019 | Littleton, CO | Staffing & Service Level Analysis of Grounds Maintenance |
| 2019 | Los Angeles County, CA | Fleet Rates |
| 2019 | Los Angeles, CA | Bureau of Street Lighting |
| 2019 | Milpitas, CA | Milpitas Parks Master Plan |
| 2019 | Milpitas, CA | Communications Study |
| 2019 | Monroe, WA | Police Organization/Staffing Study |
| 2019 | Mountain View, CA | Police Dept. Organizational Workload Study |
| 2019 | MRPC | 911 Consolidation Feasibility Study |
| 2019 | Nanaimo, BC | Maintenance and Vehicle Asset Review |
| 2019 | Nebraska DOT | Fleet Study |
| 2019 | Nebraska DOT | Fleet Study |
| 2019 | Oshkosh, WI | Fire Study |

| Year | Client | Project Scope Focus |
|---|---|---|
| 2019 | Palo Alto, CA | Business License Tax |
| 2019 | Perkasie, PA | Police Operations Study |
| 2019 | Raleigh, NC | Fire Personnel Resources Analysis |
| 2019 | Raleigh, NC | Police Personnel Resources Analysis |
| 2019 | Red River Regional, ND | 911 Spatial Needs Assessment |
| 2019 | Riverside, CA | CD Performance and Financial Review |
| 2019 | Riverside, CA | IT Performance Assessment and Financial Review |
| 2019 | Rowan County, NC | Centralized Permitting |
| 2019 | Santa Clara County, CA | Fleet Study |
| 2019 | Santa Clara, CA | Street Racing Study |
| 2019 | Schertz, TX | Staffing Level Study |
| 2019 | Scott County, IA | Sheriff's Office Staffing Study |
| 2019 | Stanislaus, CA | 911 Study |
| 2019 | Sunnyvale, TX | Police Service Options |
| 2019 | Tigard, OR | Performance Management |
| 2019 | Travis County, TX | Sheriff's Office Staffing Study |
| 2019 | Trent Lakes, ON | Fleet Audit |
| 2019 | Ventura, CA | Developmental Services Review |
| 2019 | Warrenville, IL | Performance of Service Levels and Staffing |
| 2019 | West Virginia University | Purchasing Performance Audit |
| 2019 | Wichita, KS | Fleet Study |
| 2018 | Aurora, CO | Animal Services & Code Enforcement Study |
| 2018 | Berlin, NH | Fire Service & EMS Integration & Consolidation Study |
| 2018 | Buckeye, AZ | Police Master Plan |
| 2018 | Carroll County, NH | Organizational Study |
| 2018 | Columbus, OH | Police Study |
| 2018 | Cooper City, FL | Public Safety Contract Alternative |
| 2018 | Costa Mesa, CA | Audits |
| 2018 | Denton, TX | Engineering Study |
| 2018 | Dixon, CA | Fire Master Plan |
| 2018 | Estacada RFD, OR | Audit |
| 2018 | Everett, WA | Public Works Study |
| 2018 | Forsyth County, GA | Fleet Study |
| 2018 | Fort Worth, TX | Code Enforcement Study |
| 2018 | Fort Worth, TX | Police Department Study |
| 2018 | Glenn Heights, TX | Police Department Study |
| 2018 | Grand County, UT | County Facility Plan |
| 2018 | Grants Pass, OR | Fire Study |
| 2018 | Harford County, MD | Sheriff Staffing Study |
| 2018 | Jefferson County, OR | Fire Study |
| 2018 | Libertyville, IL | Parks and Rec Study |
| 2018 | Los Angeles County, CA | Custodial Study |

| Year | Client | Project Scope Focus |
|---|---|---|
| 2018 | Los Angeles County, CA | Fleet Study |
| 2018 | Los Angeles, CA | Police Study |
| 2018 | Los Banos, CA | Fire Department Strategic Plan |
| 2018 | Los Lunas, NM | Police and Fire Study |
| 2018 | Menlo Park, CA | Public Works and Community Development Study |
| 2018 | Miami Beach, FL | Development Review Study |
| 2018 | Milpitas, CA | Development Review and Fee Study |
| 2018 | Milpitas, CA | Public Works Study |
| 2018 | Milwaukee Metro San District | Fleet Study |
| 2018 | Orland Park, IL | Management Study |
| 2018 | Oshkosh, WI | Police Study |
| 2018 | Palm Desert, CA | Police Study |
| 2018 | Placer County, CA | Fire Study |
| 2018 | Provincetown, MA | Building Permitting Study |
| 2018 | Quesnel, BC | Fleet Study |
| 2018 | Red Deer, Canada | Fleet Study |
| 2018 | Rockford, IL | Police Study |
| 2018 | Sac Reg Sanitation District, CA | Utility Staffing Study |
| 2018 | Salt Lake City, UT | 911 Study |
| 2018 | San Francisco, CA | Police Department Study |
| 2018 | San Mateo County, CA | Probation Study |
| 2018 | Santa Clara, CA | Fleet Study |
| 2018 | Seal Beach, CA | Police Staffing Study |
| 2018 | South Gate, CA | Fleet Study |
| 2018 | South Pasadena, CA | Planning Study |
| 2018 | Steamboat Springs, CO | Fire Department Operational Analysis |
| 2018 | Toho Water Authority, FL | Permitting Study Update |
| 2018 | Upper Macungie Twp, PA | Police Study |
| 2018 | Vernon, CA | Fire Standards of Coverage |
| 2018 | Waukesha County, WI | Permit Processing Study |
| 2018 | West Milford, NJ | Organization-wide Study |

We would be happy to provide information about any of these projects or any completed by the firm since our founding upon request.

# 5. References

The following chart provides summaries and reference contacts for organization-wide studies conducted by the firm and key members of the proposed project team.

| Client | Project Summary |
|---|---|
| **Gulf Shores, Alabama**<br><br>**Staffing and Operational Analysis and Projections (2019)**<br><br>Clint Colvin<br>Project Manager<br>ccolvin@gulfshoresal.gov<br>251.968.3715 | The Matrix Consulting Group conducted a comprehensive staffing and facility study for all City departments and projected staffing needs for the next 20 years. The City of Gulf Shores has experienced steady population growth in addition to increased tourism over the last decade which resulted in increased workload and a need to adjust staffing and facility usage. Additionally, with the recent addition of City Schools the number of voluntary annexations has increased, creating additional workload for all City staff.<br><br>The project team meet with representatives from each of the City's department to understand their current operations, workload, and staffing levels. Upon completion of the staffing analysis for the current fiscal year, the project team projected workload and future staffing needs by division and employee classification. The current and projected staffing needs were used as the framework to develop future facility space needs over the 20-year planning horizon. |
| **Portage, Michigan**<br><br>**Organizational Assessment**<br><br>Joe LaMargo, City Manager<br>Now Manager of Niles, IL<br>Manager@vniles.com<br>847.588.8010 | This study focused on evaluating staffing levels, organizational structure, and service delivery for all service areas of this full-service community. While generally service levels were found to be appropriate for the organization, staffing allocations and organizational structure modifications were recommended<br><br>Key recommendations included: enhancing analytical capabilities in the City Manager's Office with a Management Analyst, brining legal counsel in-house, enhancing skill sets in Finance, moving risk management functions to HR, and several new positions to enhance service levels in Community Development and Police. A recommendation was also made to consolidate Public Works and Engineering. Staffing analysis was based on addressing skill gaps and were aligned with workload. |

| Client | Project Summary |
|---|---|
| **Tigard, Oregon**<br><br>**Performance Audit Review**<br><br>Marty Wine<br>Former City Manager, now CM Monmouth, OR<br>mwine@ci.monmouth.or.us<br>503.751.0146 | This study focused on evaluating staffing levels, operational practices, and performance management for the entire City organization. This study was conducted to provide the City Council and staff input regarding opportunities to enhance operational practices and efficiency and effectiveness of service delivery.<br><br>Key recommendations in addition to staffing modifications, included the development of a set of recommended performance measures for the entire organization and the annual workplans for each department. |
| **Peoria County, Illinois**<br><br>**Operational and Staffing Analysis**<br><br>Scott Sorrell,<br>County Administrator<br>ssorrel@peoriacounty.org<br>309.692.6056 | In this study, we evaluated staffing, organizational structure and operational practices for the entire County operation (with the exclusion of the Health Department) including operations overseen by elected officials such as the Treasurer. The focus of the evaluation was to identify staffing requirements, effective utilization of supervisory/ managerial positions, development of an appropriate organizational structure for the organization, and efficiency enhancements to improve operations.<br><br>Recommendations were provided for efficiency improvements, technology enhancements, reallocation of duties between departments (where appropriate), and recommended staffing levels and organizational structure. |

We would be happy to provide additional references upon request.

# 6. Proposed Task Plan

This section of our proposal outlines our approach to providing services and a detailed task plan that outlines the services to be provided.

## 1. Approach to Providing Services

Our approach to providing the requested services includes close cooperation with our client including extensive interviewing, evaluation of City documents (budgets, organizational charts, work processes), data collection; and evaluation of policies, procedures, and technology utilization to fully understand the current service delivery approaches, challenges, and opportunities. We work closely with our clients to meet all schedule and scope of work elements for our projects.

Our place in the government consulting industry is based on our experience and our approach. While more fully explained in later sections of the proposal these strengths can be summarized as follows:

- We have conducted over 90 organization-wide studies for local government. In addition, the firm has conducted over 1,400 studies of other governmental service areas. These studies have spanned the entire country assisting clients address organizational and operational challenges and position their organization for future success.

- We are specialists, not generalists. Each staff member of our proposed team has experience conducting dozens of studies related specifically to functions under assessment. Additionally, our team includes members who have previously served as local government executives in a variety of disciplines.

- Our detailed approach to providing consulting services is client centered, recognizing that each client environment is unique.

Our firm's reputation is based on providing detailed analysis through extensive data collection, input, and interaction with our clients. The cornerstone of our philosophy in conducting organization and management studies is summarized in the following points:

- **A principal of the firm is always involved on each project.** For this project, we would commit a Vice President of the firm as Project Manager and several of our

Senior Managers as leads over each major functional area. A project of this prominence deserves the attention of the top key executives of our firm.

- **We approach our projects with a firm grounding in formal analytical methodologies**. All impacts are identified and analyzed in detail to ensure that recommendations are implemented and our clients (and the public they serve) can understand the reasons for recommended changes. This is achieved by:

  - Use of proven project management techniques.
  - Input from staff through interviews and surveys; extensive input from other stakeholders (e.g., elected officials, community representatives).
  - Detailed data collection and analysis derived from primary sources.
  - Extensive internal reviews of facts, findings, conclusions, and recommendations as studies proceed.
  - Detailed implementation plans.

This approach has provided our clients with valuable assistance and advice in dealing with important public policy issues.

## 2. Project Management and Controls

We believe very strongly in the science of our craft. As a result, we utilize formal project management techniques in our studies. These techniques include:

- All project work activities are defined in advance and tied to each project team member, deliverables, the schedule and the budget.

- The project manager and lead analysts develop general and project specific data collection plans and interview guides for all our staff.

- Project team and client expectations and results are managed on a weekly basis by developing and utilizing formal project schedules and reporting tools.

- At project initiation, we will establish a series of progress meetings with the City Manager, key stakeholders and the employee work group to review interim deliverables and findings as they are developed. This approach to collaboration throughout the engagement will ensure no surprises and provide multiple opportunities for input as the study progresses.

- The project manager designs and personally reviews all interim and final products before they are delivered to the client.

These project management approaches have resulted in all our projects being delivered at a high level of quality, on time and on budget. We are known for the depth and insight of our analysis and our client responsiveness.

## 3. Proposed Task Plan.

In the following task plan, we provide a summary of the proposed approach to providing services to the City of Joplin on this engagement. Following the description of each task is a defined deliverable for the task.

### Task 1 | Develop a Current State Assessment

To fully provide services to the City, we need to quickly develop an understanding of the key issues impacting and shaping service requirements for the community and the current organizational structures, staffing allocations, and service delivery approaches currently in place. To accomplish this, the project team will interview the City Administrator, elected officials, department heads, division managers and selected line staff to understand the overall operations of the City and individual departments. This effort will include focus on both internal and external focused service departments.

We will accomplish the following illustrative steps:

| |
|---|
| Meet with the City Manager and project steering committee to discuss project, initiation, and define specific project tasks and approaches. |
| Develop an understanding of the scope of the programs and services for each departmental function and identify for each program / service whether it is internal or external focused. |
| Conduct interviews within each department to understand the existing plans of organization as well as key organizational issues. |
| Review available information, including mission statements, budgets, workload data, union contracts, job descriptions, work rules, personnel rules, and other documents that provide insight into each department's service delivery approaches, regulatory constraints, and operational practices. |
| Develop understanding of the staffing and responsibilities for staff in each function. Document trends in staffing and identify gaps, if any, in key service areas / skills. |
| Document historical and current workloads, costs, and service levels for each functional area and the key performance indicators for each department / function. |

| |
|---|
| Develop an understanding of the major management systems to plan and schedule, monitor and adjust approaches to providing services. |
| Document the major software and technology employed throughout the City and develop an understanding of the current levels of utilization. |
| Review prior studies conducted on City operations, including the recently completed Police and Fire resource allocation studies, to understand prior analytical efforts and identify gaps in level of service, benchmarking, and operational practices from the analysis in these reports. |

During this task, we will also work with the City through a group meeting to ensure a thorough understanding of the current service level and staffing benchmarks that are currently in place. This inventory of benchmarks will then be used in later tasks (Best Practice and Comparative Assessment and the analytical phase) to determine if they are sufficient and appropriate for the organization. This discussion will also focus on identifying core functions, and the internal and external factors that are impacting the delivery of services and preventing the organization from best aligning operations with the organization's mission and vision and that result in difficulty achieving desired goals and objectives.

TASK RESULT

**Current state assessment of operational, organizational and staffing allocations for the City's Departments and overall organization.**

## Task 2 | Develop and Conduct a Survey of Employees

It is critical for the project team to develop strong input regarding current operational and organizational issues from staff. The use of an employee survey would provide all employees within the organization, beyond those individually interviewed, the opportunity to provide confidential input into this engagement. We will include a section in this survey to enable internal users of City services the ability to share input regarding the sufficiency and quality of the services received from internal service departments (for example, Human Resources, Finance, Purchasing, Facility Maintenance).

This survey will also enable the project team to develop an understanding of the current organizational culture, level of interaction between departments, workplace attitudes, potential staffing modifications, and changes in technology, tools or processes that would increase the efficiency and effectiveness of staff work efforts. The survey will also specifically request input from staff regarding the factors, internal or external, that are impacting service delivery in meeting the City's goals and objectives.

The survey would be conducted electronically through the use of SurveyMonkey and would be designed to ensure anonymity of all respondents.

TASK RESULT

**The product of this task would be a summary of the employee survey results.**

## Task 3 Conduct a Survey and Focus Group Meetings for Residents and Stakeholders.

In addition to staff input, it is critical for the project team to develop strong input regarding current operational and organizational issues from key stakeholders and residents regarding the services provided to users outside of the organization. The use of a stakeholder survey would provide all residents and service recipients to provide input into this study regarding the levels of service currently received and whether these are appropriate, from the customer perspective, for the City.

This survey will be an important component of understanding the public's perceptions regarding service levels. It will specifically request input from the public regarding specific service levels and the adequacy thereof of each operating department within the City and ask for input on changes in the service levels that should be made. The survey would be conducted electronically through the use of SurveyMonkey and would be designed to ensure anonymity of all respondents. We would also request the City to assist with promoting the survey through placement on its website and social media to ensure a high level of community awareness of the opportunity to provide input.

Following the completion of the public survey, the project team will conduct two community focus groups to gather further input regarding the public's service expectations. The focus groups will start with an overview of findings from the survey and then explore specific service areas identified as needing modifications.

The focus groups can be conducted either in person or virtually depending upon the desire of the City.

TASK RESULT

**The product of this task would be a summary of the community survey and focus group results.**

## Task 4 | Conduct a "Best Management Practices" and Comparative Assessment of Organization, Staffing and Management.

In this task, our project team will utilize "best management practices" and a comparative survey to evaluate staffing, productivity, processes, use of technology, management planning, as well as many other dimensions of organizational performance for the functions under review. We will utilize the existing benchmarks identified in Task 1 (current state assessment) to compare existing practice to both national/industry standards and those within comparable high-growth communities. To accomplish this, we would undertake the following activities:

**Best Practices Assessment** – The project team would develop a detailed list of "best management practices" for use in a diagnostic appraisal of organizational structure, staffing and service delivery for each department. This diagnostic appraisal would additionally utilize recognized industry staffing benchmarks to assess current staffing allocations based upon service levels, operational practices and staffing levels appropriate for the community. This effort will establish the initial benchmarks, service and staffing, based upon national standards. These will be used in the next effort, the comparative survey, to benchmark the City of Joplin against other peer entities.

**Comparative Survey** – Additionally, we would compare organizational structure, staffing levels, managerial spans of control, contracted services, key operational practices and management performance indicators with comparable communities. The comparative survey would provide insight regarding how the City compares to other comparable higher-growth organizations in Missouri and the Midwest and identify areas for further inquiry for potential modification of service levels, organizational structure or operational practices to enhance efficiency, effectiveness or competitiveness of service delivery and staffing utilization. This comparative research effort, in conjunction with the best practices assessment above, will provide a comprehensive analysis of the current benchmarks and the gap between existing levels and the recommended benchmark.

The results of this task will provide a strong understanding of current strengths of the organization and of potential improvement opportunities for further evaluation as well as an understanding of how the City of Joplin compares to peer communities from a benchmarking perspective. The specific recommendations for the City of Joplin in staffing and service levels will be developed in the next task based upon further analysis and incorporating our assessment of internal practices and technology utilization.

At the conclusion of this task, we propose reviewing the best practices and comparative effort findings and benchmarking with the City Manager, department heads and key stakeholders to ensure an understanding of the findings developed from this effort. This review will be important prior to our analysis and development, in the next task, of the specific recommendations for levels of service and staffing for each department.

TASK RESULT

**Comparison of the City's organizational structure, staffing, and service delivery to industry practices and comparable municipal entities.**

## Task 5 | Organizational, Operational and Staffing Assessment

In this important work task, opportunities for improving the organizational structure, management, operations and staffing will be analyzed. This task will include such approaches and methodologies as the following:

**Evaluate the organizational structure in each department and the City.** We will evaluate organizational structure in terms of gaps or overlaps in function, spans of control and appropriate organizational location.

- Is the organization structure too "tiered" or too "flat" from the management staffing perspective?
- Are functions placed too high or too low in regard to their importance in meeting operating and service objectives?
- Are services / functions appropriately located in the organization?
- Are there any overlapping or duplicated functions?

**Evaluation of the adequacy of major work practices.** The analysis will focus on identification of opportunities to streamline work practices to increase utilization levels and/or reduce staffing requirements. Through the analysis of major work practices, the consulting team will determine:

- The frequency of various work tasks now performed is unnecessary or can be reduced.
- Skill mix for positions can be improved.
- Effectiveness of the use of technology to simplify work activities and deliver services.
- Evaluate appropriateness of outsourced services, if any, to determine if they are being provided in the most cost-effective manner.

**Develop future service level, benchmarks and staffing recommendations.** This analytical effort will develop a staffing allocation for each department of the City based upon current and projected service levels, workload, and processes. Staffing metrics will be provided for use in evaluating future staffing modifications based on "trigger points", service requirements or workload increases. In all cases, staffing recommendations will be aligned with specific levels of service so that policy decisions can be made on service levels and understand the staffing required to successfully implement. This approach will enable policy determinations based upon current approaches, the recommended level of service or a level in-between if they differ.

For each operational area of the City, we will identify the benchmarks to be used as standards for the City of Joplin and indicate if these are based upon and align with the either the comparative effort, industry best practices or both. The recommended benchmarks will take into consideration the unique service demands and expectations present in the City of Joplin.

**Analyze the effectiveness of managing performance in the City.** Departmental operations require effective management to ensure that staff are appropriately scheduled, deployed, utilized and held accountable for performance. The project team will evaluate this in terms of the following:

- How do managers plan, schedule and control the work to be done in each of the City's organizational units?
- Do managers have accurate and timely measures of the performance of each unit?
- How are goals, objectives and service level targets developed?
- How is 'customer service' defined, promoted and supported?
- How is succession planning and continuation of institutional knowledge being managed?

At the conclusion of this analysis, we will provide a series of operational recommendations to improve performance management.

**Evaluate technology.** The project team will evaluate technology utilization to identify whether appropriate technology is in place to support service delivery and whether existing technology is being effective and fully utilized to minimize effort and support the effective use of staff resources.

During this task, the project team will also analyze those issued identified from the employee and comparative survey to determine if other operational changes should be implemented in the City to increase efficiency or effectiveness of service provision and staff utilization.

This analysis will include a performance plan that the City can utilize to monitor service levels moving forward. A portion of the performance plan would include a section outlining how the City should update and evaluate the benchmarks, levels of service and associated staffing requirements in the future.

The preliminary recommendations developed will be presented for review with the City prior to finalization. This would one opportunity to hold a formal progress meeting and briefing session with key stakeholders and the employee work group regarding the preliminary recommendations for input prior to development of the final report.

TASK RESULT

**The result of this task would be a detailed analysis of the organizational, management and operational choices in service delivery, service levels and the staffing needs in each department.**

## Task 6 | Prepare a Final Report and Provide an Implementation Plan.

Upon the conclusion of the assessment, we will prepare a detailed report which summarizes the results of each of the previous work tasks described above. This report

would include: a description of the study methodology, detailed evaluation of service levels for each department and recommended organizational structure, spans of control and staffing, operational improvements, and identification of opportunities to enhance service delivery through more effective technology utilization. For all recommendations, we will provide a suggested timeframe for implementation and estimated costs to implement or costs savings to be achieved from implementation.

The implementation plan provided in the executive summary can be utilized to evaluate the organization's progress towards implementation and a framework for maintaining the benchmarks, level of service and staffing requirements in the future. We will provide specific direction on the appropriate performance measures that can be utilized in assessing the effectiveness and impact of each implemented recommendation so that the organization can track and report out on the impact of changes made.

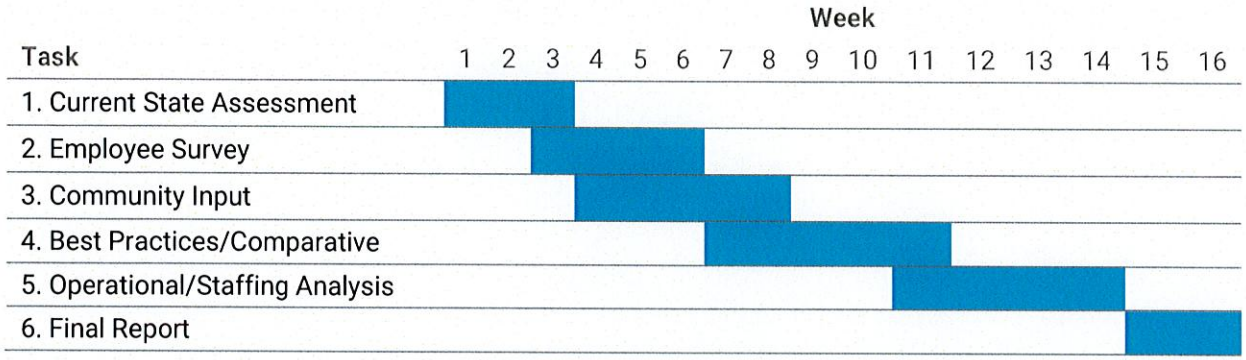
The analysis would be reviewed in draft form with the internal review team. Once this review is completed, the project team will review all comments received, edit and finalize the report and present the final report to the City leadership team, and City Council.

**TASK RESULT**

**The result of this task would be the draft and final report and implementation plan together with all of the technical documents developed during the study process.**

# 7. Timeline to Complete Study

Based on the task plan presented in the previous section, we propose to conduct this engagement over a sixteen-week period as outlined in the schedule below.




We are available to begin work immediately upon selection and would be able to allocate our team to start work on March 9, 2022, as outlined in the request for proposal.

# 8. Cost of Proposal

We are proposing to conduct this engagement for the defined at a not-to-exceed price of **$99,000.** This cost includes all the tasks outlined in the minimum scope of services in the request for proposal. The all-inclusive price is detailed in the following budget.

| Task | Project Manager | Lead Analyst | Senior Analyst | Analyst | Total |
|---|---|---|---|---|---|
| 1. Current State Assessment | 8 | 32 | 32 | 40 | **112** |
| 2. Employee Survey | 4 | 8 | 8 | 24 | **44** |
| 3. Community Survey/Focus Groups | 12 | 24 | 16 | 16 | **68** |
| 4. Best Practices/Comparative | 8 | 32 | 40 | 40 | **120** |
| 5. Operational and Staffing Analysis | 16 | 40 | 40 | 48 | **144** |
| 6. Final Report | 16 | 32 | 40 | 24 | **112** |
| Total Hours | **64** | **168** | **176** | **192** | **600** |
| Hourly Rate | **$240** | **$185** | **$150** | **$110** | |
| Total Professional Fees | **$15,360** | **$31,080** | **$26,400** | **$21,120** | **$93,960** |
| **Travel Expenses** | | | | | **$5,040** |
| **Total Project Cost** | | | | | **$99,000** |

For items that the City may request outside the scope of the workplan outlined in this proposal and in the minimum scope for this study, we propose to bill for actual time at the following hourly rate per employee.

The following table summarizes our hourly billing rates by employee.

| Employee | Title | Hourly Rate |
|---|---|---|
| Alan Pennington | Vice President | $240 |
| Khushboo Hussain | Senior Manager | $185 |
| Aaron Baggarly, AICP | Senior Manager | $185 |
| Jen Winter | Senior Manager | $185 |
| Robert Finn | Senior Manager | $185 |
| David Branch | Manager | $150 |
| John Scruggs | Manager | $150 |
| Joe McDonald | Consultant | $110 |