CITY OF JOPLIN
COUNCIL AGENDA ITEM

ITEM
Council Bill 2022-119 – approving a contract with Matrix Consulting Group, Ltd. for professional consulting services for preparing the City of Joplin's Benchmark Study.

MEETING DATE
March 21, 2022

ORIGINATING DEPARTMENT
Public Works - Operations

ATTACHMENTS
Council Bill 2022-119 Ordinance, contract, Scoring Sheet, Submittals

REVIEWED BY
Director of Public Works: David Hertzberg; Director of Finance: Leslie Haase; City Attorney: Peter Edwards; City Manager: Nicholas Edwards.

SUMMARY
This Council Bill authorizes the City Manager or his designee to approve a contract with Matrix Consulting Group, Ltd. in the not to exceed amount of Ninety-Nine Thousand and 00/100 Dollars ($99,000.00) for professional consulting services for the City of Joplin's Benchmark Study.

BACKGROUND
On December 16, 2021, City Staff published a Request for Proposal for the development of a Comprehensive Benchmark Study. The City of Joplin was looking for a firm that would evaluate the current services and level of services including manpower, contracts, procedures, policies, as well as internal and external services. Moreover, as part of this evaluation process, Staff is needing to collect input data pertaining to level of services offered and compare these with cities of comparable size, services provided, and high-growth communities within the Midwest. This Study will receive feedback from both stakeholders and shareholders of our city. Ultimately, Staff is looking to develop established level of services which could be implemented to provide better levels of service to the citizens. The firm will provide a comprehensive final report outlining their methodologies used with findings and conclusions. City staff used the procurement process to request proposals and conducted interviews with three of the firms that submitted RFP's. The Benchmark Study Committee reviewed packages after receiving the RFP's, graded interviews and selected Matrix Consulting Group on March 3rd. Staff has reviewed the qualifications and submittal by Matrix Consulting Group and find them to be within industry standards and the best candidate to represent the city in this study.

FUNDING SOURCE
General Fund.

RECOMMENDATION
Staff recommends passage of this Council Bill on first reading.

Proposal to Conduct a Benchmark and Level of Service Study

JOPLIN, MISSOURI

Original

January 25, 2022

matrix consulting group

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matrix
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

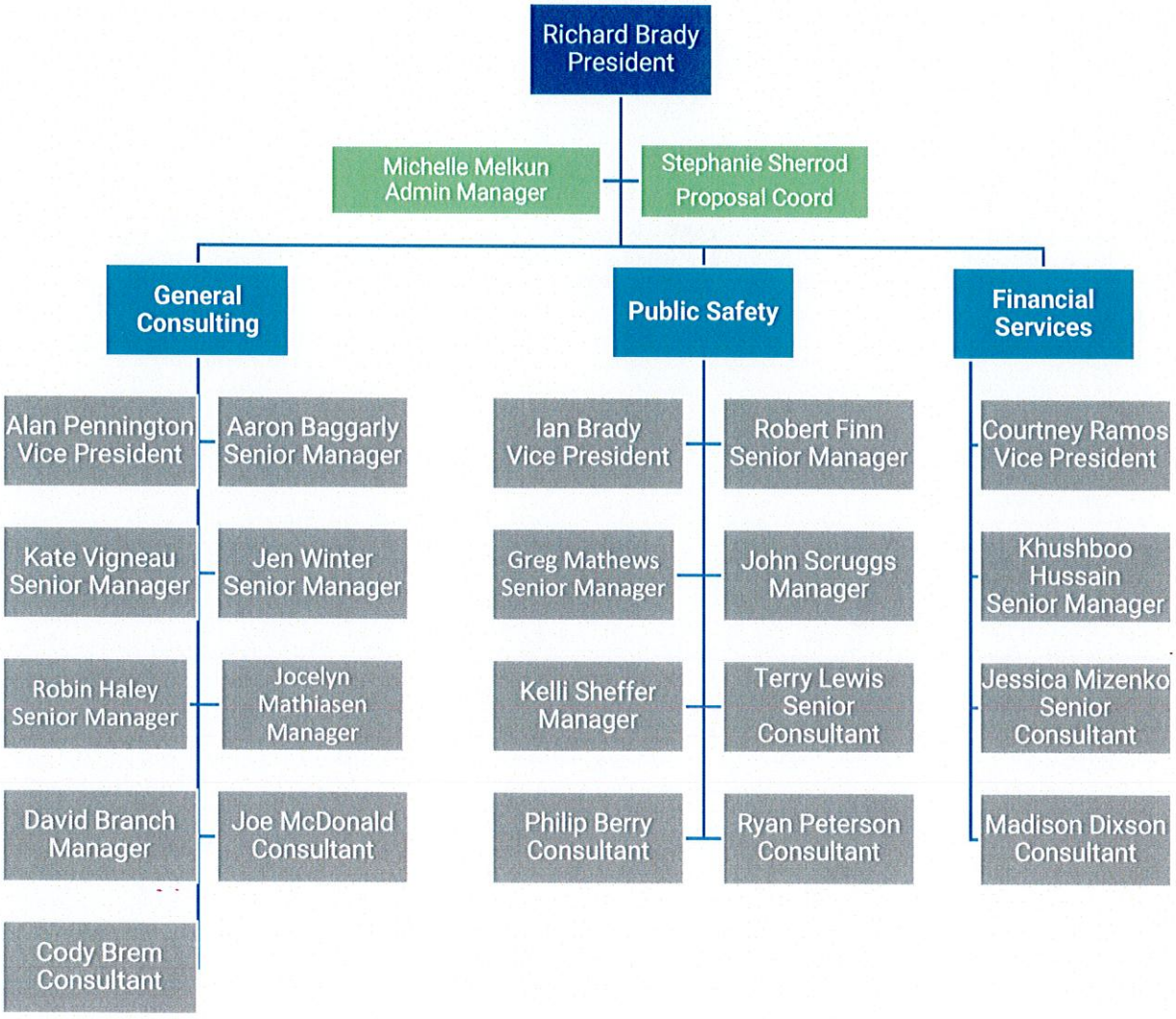
This section of our proposal will outline the requested information for the Matrix Consulting Group.

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

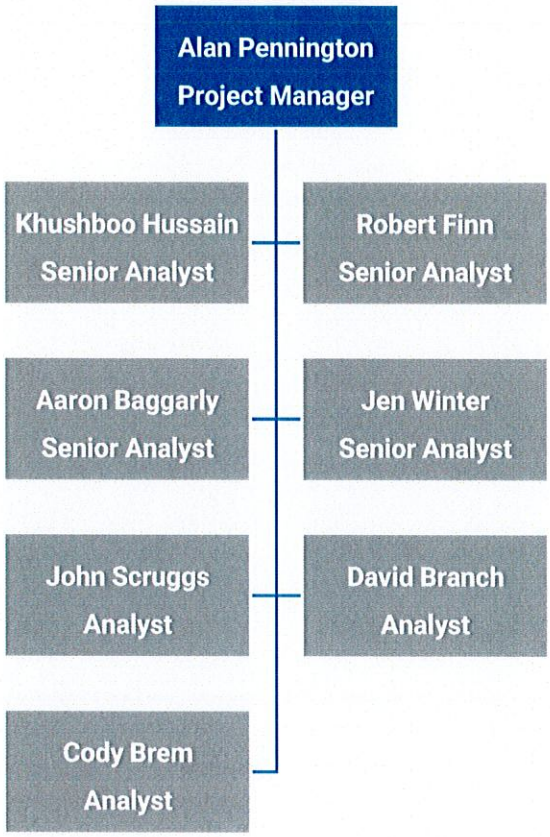
	Email	rbrady@matrixcg.net
	Phone	650-823-3174
Project Manager	Name	Alan Pennington, Vice President
	Email	apennington@matrixcg.net
	Phone	618-795-1995
Office Locations	Edwardsville, IL	101 Southpointe Dr, Suite E Edwardsville, IL 62025 Phone: 618-692.9085
	Charlotte, NC	8022 Providence Road, Suite 500-106 Charlotte, NC 28277 Phone: 803-622-9910
	Portland, OR	329 NE Couch Street, Suite 307 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 **Staffing and Operational Analysis and Projections (2019)** Clint Colvin Project Manager ccolvin@gulfshoresal.gov 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. 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 **Organizational Assessment** Joe LaMargo, City Manager Now Manager of Niles, IL Manager@vniles.com 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 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 **Performance Audit Review** Marty Wine Former City Manager, now CM Monmouth, OR mwine@ci.monmouth.or.us 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. 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 **Operational and Staffing Analysis** Scott Sorrell, County Administrator ssorrel@peoriacounty.org 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. 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.

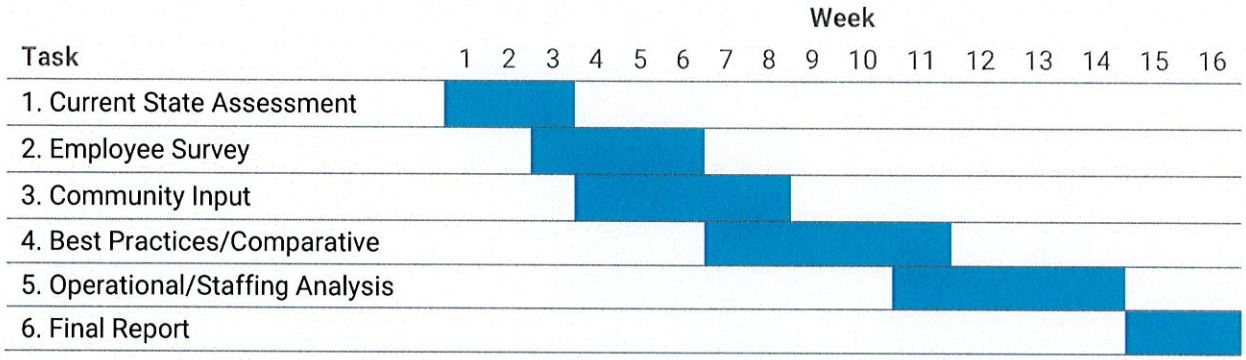
The analysis would be reviewed in draft form with the internal review team. Once this review is completed, the project team will review all comments received, edit and finalize the report and present the final report to the City leadership team, and City Council.

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

Public Works
602 S Main Street
Joplin, Missouri 64801
417-624-0820

MEMORANDUM:

March 11, 2022

From: Lynden Lawson, Assistant Director of Public Works for Operations
To: Nick Edwards, City Manager City of Joplin

Subj: FINAL SCORING FOR BENCHMARK STUDY

PANEL		**Baker Tilley**	**Matrix**	**Management Partners**
1		38	43	42
2		44	50	30
3		41	45	44
4		35	40	30
5		45	47	44
6		40	45	35
7		50	41	33
8		45	48	42
9		40	50	45
10		42	48	43
TOTAL		420	457	388
AVR Score		42	45.70	38.80

1. Any questions or comments can be addressed through the Assistant Director of Public Works - Operations at (417) 625-0820 ext. 1560.

Lynden Lawson

AGREEMENT
FOR CONSULTING SERVICES

THIS AGREEMENT is made and entered into this _____ day of _____, 2022, by and between the City of Joplin, Missouri, a Missouri Municipal Corporation, hereinafter referred to as "City," and Matrix Consulting Group, Ltd, a California Corporation, hereinafter referred to as "Consultant," and with City and Consultant being referred to collectively as "the Parties."

WITNESSETH:

WHEREAS, City desires to engage Consultant to perform the services described in Request for Proposal 2022-RFP-03, attached hereto and incorporated by reference as Exhibit A; and

WHEREAS, Consultant submitted its proposal dated January 25, 2022, attached hereto and incorporated by reference as Exhibit B; and

WHEREAS, Consultant has become the lowest and best Offeror for performing said services.

NOW, THEREFORE, in exchange for valuable consideration each received from the other, the receipt and sufficiency of which are hereby acknowledged, the Parties do hereby agree as follows:

1. Scope of Work and Payment.

a. City agrees to engage Consultant for performance, and Consultant agrees to perform, the services described in Exhibit A within the time specified therein.

b. The services of Consultant shall commence only as authorized in writing by City and shall be undertaken and completed as promised by Consultant as described in Exhibit B.

c. City agrees to pay Consultant in accordance with the prices and terms set forth in Exhibit B for work authorized by City upon presentation of proper invoice and inspection by City of work completed by Consultant. However, in no event shall the total payment for the scope of work exceed $99,000.00.

d. All information, data, and reports as are existing, available, and necessary for the carrying out of the work, shall be furnished to Consultant without charge, and the Parties shall cooperate with each other in every way possible in carrying out the scope of services.

e. Consultant shall fully coordinate its activities in the performance of this contract with the activities of City.

f. Consultant represents that Consultant will secure the following at Consultant's own expense: all personnel required to perform the services called for under this contract by Consultant. Such personnel shall not be employees of or have any contractual relationship with City except as employees of Consultant. All the services required hereunder will be performed by Consultant or under Consultant's direct supervision and all personnel engaged in the work shall be fully qualified and shall be authorized under state and local law to perform such services. None of the work or services covered by this contract shall be subcontracted without the written approval of City.

2. Amendments. The covenants and obligations herein contained are the full and complete terms of this Agreement, and no alteration, amendments, or changes to such terms shall be binding unless first reduced to writing and executed with the same formality as this Agreement.

3. Assignment. This Agreement, including payment hereunder, shall not be sub-let, assigned, or otherwise disposed of, except with the prior written consent of the City.

4. Attorney's Fees and Expenses. If City files suit in order to enforce any term of this Agreement and is the prevailing party, Consultant shall be liable for City's reasonable attorney's fees and expenses. In no event shall City be liable for Consultant's reasonable attorney's fees and expenses.

5. Binding Effect. This Agreement shall be binding upon the parties hereto, their heirs, executors, administrators, legal representatives, successors, and assigns, and shall be binding in the event of the death or legal disability of the parties. Provided, however, that nothing in this paragraph shall be construed as a consent by City to any assignment of this Agreement or any interest therein by Consultant.

6. Choice of Law and Venue. This Agreement has been made, and its validity, performance and effect shall be determined, in accordance with the laws of the State of Missouri and venue for litigation between the parties shall be solely and exclusively in Jasper County, Missouri.

7. Compliance with Laws. Consultant shall observe and comply with all Federal, State, and local laws and ordinances that affect those employed or engaged by it on the project, or the material or equipment used, or the conduct of the work, and shall procure all necessary licenses, permits, and insurance.

8. Confidentiality. Any reports, data, or similar information given to or prepared or assembled by the Consultant under this contract which the City requests to be kept as confidential shall not be made available to any individual or organization by the Consultant without prior written approval of the City.

9. Contract Documents. The contract documents shall consist of the following: this Agreement, City's Request for Proposal, and Consultant's Response to City's Request for Proposal. In the event of conflict between the contract documents, this Agreement will prevail.

In the event of conflict between the City's Request for Proposal and Consultant's Response to City's Request for Proposal, City's Request for Proposal will prevail.

10. Entire Agreement. This Agreement (including any Exhibits) contains the entire understanding of the parties with respect to the subject matter hereof. It may not be altered or amended except by an agreement in writing signed by both parties.

11. Ethics. Consultant warrants that it has not employed or retained any company or person, other than a bona fide employee working solely for Consultant, to solicit or secure this Agreement, and that it has not paid or agreed to pay any company or person, other than a bona fide employee working solely for Consultant, any fee, commission, gift, or contingent fee.

12. Headings. The headings of paragraphs in this Agreement are for convenience only. The headings form no part of this Agreement and shall not affect its interpretation.

13. Indemnification.

a. In no event shall the City be liable to the Consultant for special, indirect, or consequential damages, except those caused by the City's gross negligence or willful or wanton misconduct arising out of or in any way connected with a breach of this contract. The maximum liability of the City shall be limited to the amount of money to be paid or received by the City under this contract.

b. The Consultant shall defend, indemnify, and hold the City harmless, its elected or appointed officials, agents, and employees from and against any and all liability, suits, damages, costs (including attorney fees), losses, outlays, and expenses from claims in any manner caused by, or allegedly caused by, or arising out of, or connected with, this contract, or the work or any subcontract there under (the Consultant hereby assuming full responsibility for relations with subcontractors), including, but not limited to, claims for personal injuries, death, property damage, or for damages from the award of this contract to Consultant.

c. The Consultant shall indemnify and hold the City harmless from all wages or overtime compensation due any employees in rendering services pursuant to this agreement or any subcontract, including payment of reasonable attorneys' fees and costs in the defense of any claim made under the Fair Labor Standards Act, the Missouri Prevailing Wage Law or any other federal or state law.

d. The indemnification obligations of Consultant hereunder shall not be limited by any limitations as to the amount or type of damages, compensation or benefits payable by or for the Consultant, under any federal or state law, to any person asserting the claim against City, its elected or appointed officials, agents and employees, for which indemnification is sought.

e. The indemnification obligations herein shall not negate, abridge, or reduce in any way any additional indemnification rights of the City, its elected or appointed officials, agents and employees, which are otherwise available under statute, or in law or equity.

f. Consultant affirms that it has had the opportunity to recover the costs of the liability insurance required in this agreement in its contract price. Consultant's obligation under this agreement to defend, indemnify and hold harmless any person from that person's own negligence or wrongdoing is limited to the coverage and limits of the applicable insurance.

14. Independent Contractor. This Agreement does not create an employer-employee relationship between the parties. Consultant is an independent contractor and is not entitled to any benefits including health, dental, vision, disability, life, and unemployment insurance, worker's compensation coverage, and LAGERS. Consultant is an independent contractor and not an employee for all purposes including the application of the Fair Labor Standards Act Minimum Wage and Overtime Payments, Federal Insurance Contribution Act, Social Security Act, Federal Unemployment Tax Act, and the provisions of the Internal Revenue Code, Missouri Revenue and Taxation Laws, and Missouri's Worker Compensation Laws and Unemployment Insurance Laws.

15. Insurance. Consultant shall secure and maintain at its own cost and expense, throughout the duration of this Agreement, insurance of such types and in such amounts as may be necessary to protect it and the interests of City against all hazards or risks of loss as hereunder specified or which may arise out of the performance of this Agreement. Such policies shall name City as an additional insured, with limits of liability not less than the sovereign immunity limits for Missouri public entities calculated by the Missouri Department of Insurance as of January 1 each calendar year and published annually in the Missouri Register pursuant to Section 537.610, RSMo. (See, http://insurance.mo.gov/industry/sovimmunity.php)

16. Intellectual Property. Any information, know-how, data, results, inventions, and any associated intellectual property, that is made, discovered, created, invented, or generated by Consultant in any activities or work under this Agreement shall be owned by City.

17. Non-Discrimination. In performance of the work covered by this Agreement, Consultant shall not discriminate against any worker because of race, creed, color, political affiliation, handicap, or national origin.

18. Notices. All notices required or permitted hereinunder and required to be in writing may be given by first class mail addressed to City and Consultant at the addresses as follows:

City of Joplin
ATTN: City Attorney
602 S. Main St.
Joplin, MO 64801

Matrix Consulting Group, Ltd
ATTN: Richard P. Brady
1650 S Amphlett, Suite 213
San Mateo, CA 94402

The date of delivery of any notice given by mail shall be the date falling on the second full day after the day of its mailing.

19. Records and Audits. The Consultant shall maintain accounts and records, including personnel, property, and financial records, adequate to identify and account for all costs pertaining to the Contract and such other records as may be deemed necessary by the City to assure proper accounting for all project funds. These records will be made available for audit purposes to the City or any authorized representative, and will be retained for three years after the expiration of this Contract.

20. Representations. The signatories hereto represent and warrant that they have read this Agreement, that they are fully authorized in the capacities shown, that they understand the terms of this Agreement, and that they are executing the same voluntarily and solely for the consideration described herein.

21. Severability. If any of the provisions of this Agreement shall be construed to be invalid or illegal, the legality or validity of the other provisions of this Agreement shall not be effected thereby. Any illegal or invalid provision of this Agreement shall be severable and any other provisions shall remain in full force and effect.

22. Subcontractors. Consultant shall be as fully responsible to City for the acts and omissions of its subcontractors, and of persons either directly or indirectly employed by them, as Consultant is for the acts and omissions of persons it directly employs. Consultant shall cause appropriate provisions to be inserted in all subcontracts relating to this work, to bind all subcontractors to Consultant by all the terms herein set forth, and insofar as applicable to the work of subcontractors and to give Consultant the same power regarding termination of any subcontract as City may exercise over Consultant under any provisions of this Agreement. Nothing contained in this Agreement shall create any contractual relation between the subcontractor and City or between any subcontractors.

23. Termination. If, through any cause, Consultant shall fail to fulfill in a timely and proper manner Consultant's obligations under this contract, or if Consultant shall violate any of the covenants, agreements, or stipulations of this contract, City shall thereupon have the right to terminate this contract by giving written notice to Consultant of such termination and specifying the effective date thereof, at least five (5) days before the effective day of such termination. City may, without cause, terminate this contract upon thirty (30) day's prior written notice. In either such event, all finished or unfinished documents, data, studies, reports, or other materials prepared by the Consultant shall, at the option of City, become its property. Consultant shall be entitled to receive just and equitable compensation for any satisfactory work completed. Notwithstanding the above, Consultant shall not be relieved of liability to City for damages sustained by City by virtue of any such breach of the contract by Consultant.

24. Third-Party Beneficiaries. This Agreement shall not confer any rights or remedies upon any person other than the parties and their respective successors and permitted assigns.

25. Unauthorized Aliens. That pursuant to Missouri Revised Statute Sections 285.525 through 285.555, if this contract exceeds the amount of $5,000.00 and Consultant is associated with a business entity, Consultant shall provide an acceptable notarized affidavit

stating that the associated business entity is enrolled in and participates in a federal work authorization program with respect to the employees working in connection with the contracted services, and that said business entity does not knowingly employ any person who is an unauthorized alien in connection with the contracted services. Additionally, Consultant must provide documentation for said business entity evidencing current enrollment in a federal work authorization program.

26. Waiver. Waiver of any provision of this Agreement or breach of this Agreement shall not thereafter be deemed to be a consent by the waiving party to any further waiver, modification or breach by the other party, whether new or continuing, of the same or any other covenant, condition or provision of this Agreement. Failure by one of the parties to this Agreement to assert its rights for any breach of this Agreement shall not be deemed a waiver of such rights.

IN WITNESS WHEREOF, the Parties have hereunto set their hands the date first above written.

CITY OF JOPLIN, MISSOURI	Matrix Consulting Group, Ltd.
_____	_____
Nick Edwards, City Manager	Richard P. Brady, President

ATTEST:

_____
Holly Nagy, City Clerk

APPROVED AS TO FORM:

_____
Peter C. Edwards, City Attorney

COUNCIL BILL NO. 2022-119 ORDINANCE NO

AN ORDINANCE approving a Contract by and between the City of Joplin and Matrix Consulting Group, Ltd. to perform a Benchmark Study in the amount not to exceed amount Ninety-Nine Thousand and 00/100 Dollars ($99,000.00) for consulting services; authorizing the City Manager or his designee to execute the same by and on behalf of the City of Joplin.

BE IT ORDAINED BY THE COUNCIL OF THE CITY OF JOPLIN, as follows:

Section 1. That the Contract with Matrix Consulting Group, Ltd. in the not to exceed amount of Ninety-Nine Thousand and 00/100 Dollars ($99,000.00) for professional consulting services for preparing the City of Joplin's Benchmark Study, a true and accurate copy of said contract being attached hereto and incorporated herein, be, and the same is hereby approved.

Section 2. That the City Manager of the City of Joplin, Missouri, or his designee, is hereby authorized and directed to execute said contract, in substantially similar form, by and on behalf of the City of Joplin.

Section 3. That the Director of Finance is hereby directed to make all necessary entries on the City records to show the increase in appropriations.

Section 4. That upon the final approval and acceptance of the consultant's work under said contract, in substantial conformance with the attached work authorization, in writing by the Director of Public Works and his certification to the effect to the Director of Finance, the consultant shall be paid from the General Fund.

Section 5: That the ordinance is adopted on First Reading and will be moved to Second and Third Reading.

Passed by the Council of the City of Joplin, Missouri, this _____ day of

_____, 2022 by a _____ vote.

_____

Ryan D. Stanley, Mayor

ATTEST:

_____

Holly Nagy, City Clerk

APPROVED AS TO FORM:

_____
Peter C. Edwards, City Attorney

Council Bill 2022-119

I hereby certify that a sufficient amount is available in the General Fund to pay the amounts called for on the basis of the negotiated fee.

_____
Leslie Haase, Director of Finance