

PROPOSAL TO PERFORM A
REVIEW OF THE RESOURCE
MANAGEMENT AGENCY

COUNTY OF MONTEREY, CA

NOVEMBER 11, 2019





CITYGATE ASSOCIATES, LLC

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November 11, 2019

Nick Chiulos
Assistant County Administrative Officer
County of Monterey
chiulosn@co.monterey.ca.us

RE: PROPOSAL TO PERFORM A REVIEW OF THE RESOURCE MANAGEMENT AGENCY FOR MONTEREY COUNTY

Dear Mr. Chiulos:

Citygate Associates, LLC, founded in 1990, is pleased to present this proposal to perform a review of the Resource Management Agency (RMA) for Monterey County. Citygate has conducted over 500 consulting reviews for over 300 government agencies primarily in the West, with a specialization in land use, community development, and other functions found in RMAs. (Please visit our website at www.citygateassociates.com/cdd for further information.)

“I really, really enjoyed reading your work product. I appreciate the fact that it was direct, it was constructive, and...it wasn't finger-pointing, it was just...the facts. And I think that the money was well spent.”

J.T. Martin
Council Member, Salt Lake City

In Citygate's 30 years of conducting studies for the full range of local government functions, we observe that planning and building functions, with their related functions often found in RMAs, are possibly the most complex set of services local governments deliver to the public. These intertwined and interdependent services (think permit processing!) are extremely challenging to deliver in a timely, consistent, and reliable manner. Processing backlogs and a whole host of other problems result. No wonder that these functions are often the source of the highest number of complaints to elected officials. Citygate will build on the existing strengths of the services under study, and leverage these through findings and recommendations to enhance organizational performance and excellence!

EXTENSIVE LOCAL GOVERNMENT PRACTITIONER / CONSULTANT EXPERIENCE

Our project consultants have in-depth experience in the functions within the scope of this project, both as practitioners and consultants. We are unique in that our proposal relies on a team of

practitioners with over 250 years of combined experience as executives in local government. Our consultants have served at the executive level in land use and community development programs, as well as parks, public works, economic development, housing, and other functions often found in California county Resource Management Agencies. Our team has the diversity of experience to deal with all the elements necessary in this unique project!

- ◆ *Evert Palmer, ICMA-CM, MPA*, our Project Manager, has 23 years in local government including serving as City Manager, Assistant City Manager, Director of Administrative Services, and Assistant Finance Director / Information Technology for the City of Folsom. Mr. Palmer is currently leading Citygate's citywide staffing analysis and optimization plan for the City of West Hollywood. Mr. Palmer has significant experience with alternative service delivery, contracting, efficiency measures, and public/private partnerships, which he utilized to lead the City of Folsom, including its dynamic and potent Community Development Department, through the Great Recession.
- ◆ *Jane Chambers, ICMA-CM, MPA*, our Lead Consultant, has 25 years of local government experience including executive leadership as a City Manager, Assistant City Manager, Public Works Director, and Human Resources Director in full-service urban, suburban, and rural communities. She recently led our community development reviews for Goleta, CA and Healdsburg, CA and brings operational, financial, and public works experiences in a variety of communities.
- ◆ *Julee Conway, MBA, CPRP*, our Parks and Recreation Specialist, has over 25 years of county and municipal government experience. Having directed numerous local government parks and recreation agencies, she has extensive local, regional, and national exposure and insight related to all facets of community engagement and consensus building associated with creating, developing, managing, and promoting a sustainable and nimble parks, recreation, and community services agency.
- ◆ Citygate's Project Team will also include: *John Hester, MCRP, AICP*, our Planning and Building Specialist and Technical Advisor, who has over 30 years of experience in planning, building, and community development functions within local government, many as an executive, and is currently the Chief Operating Officer for the bi-state Tahoe Regional Planning Agency (TRPA); *Connie Jackson*, our Local Government Specialist, who has over 32 years of local government experience and served as City Manager in the City of San Bruno for 15 years and the coastal City of Fort Bragg for four years; *Dr. Nicholas Pinhey, DPA*, our Public Works Specialist and Technical Advisor, who has over 33 years of experience in the management of public works and municipal utility

departments and has served as a Director of Public Works or Assistant Public Works Director for the majority of his career; *Andrew Green, MBA*, our Fiscal Specialist, who has over 35 years of experience in all aspects of local government finance, and had primary responsibility for the development and monitoring of agency-wide budgets as Finance Director for four agencies; *Chief Samuel Mazza*, our Local Client Coordinator, who is the former Fire Chief for the City of Monterey, has directed two Citygate projects for Monterey County, and resides locally in Salinas; and finally, *David DeRoos, MPA, CMC*, Citygate's President, who has led over 500 consulting engagements, including every community development study Citygate has performed.

- ◆ We are committed to producing outcomes and results, not reports with recommendations that may never be implemented. We have unmatched experience in implementation, since our team includes practitioners who have implemented the types of changes associated with continuous improvement recommendations, and we understand the many challenges that local governments face as they make changes to current policies, processes, procedures, staffing, etc.
- ◆ We have successfully conducted related land use and community development studies for counties such as Sacramento, San Diego, and Solano Counties, CA; Jackson County, OR; Clark County, WA; and Lee County, FL. Our engagements for cities have included Salinas, San Luis Obispo, Albany, Glendale, Delano, Colton, Los Altos, Pittsburg, Healdsburg, Modesto, Corona, Vista, Carlsbad, Atwater, Goleta, and Ojai, CA; Salt Lake City and Ogden City, UT; and Grants Pass, Beaverton, and West Linn, OR. In working for these and other local governments, we have developed an extensive database of standards and best practices for benchmarking and comparing performance between jurisdictions.
- ◆ Our local project expertise is also extensive, having served Monterey County six times since 2013 on the following projects: Winter Storm Response Plan Update (2019); Comprehensive Services Delivery and Staffing Review of the Sheriff's Department (2017); Update of the Monterey County EMS Communications Plan (2016); Office of Emergency Services Tabletop Exercise for Elkhorn Slough (2015); EMS Agency Ambulance System Issues Review and Analysis of Options (2013); and Healthcare Preparedness Partnership Training, Education, and Exercise Analysis (2013). Citygate also performed a Community Development Organizational Analysis and Strategic Plan for the City of Salinas in 2013.
- ◆ Our Final Report will focus on implementation based on concrete, evidenced-based findings and recommendations. Our specific recommendations will be presented in an Implementation Action Plan: a tabular form beginning with a

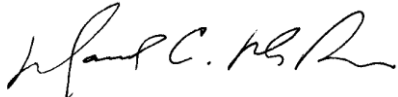
description of each recommendation, followed by a priority ranking of their importance, a specific time line for implementation, the benefits that are anticipated from implementing the recommendations, and then the identification of the individual or the entity that is to be held responsible and accountable for implementing the recommendation. The County will not find a more thorough or user-friendly format to aid implementation of recommendations.

- ◆ Finally, we offer a one-of-a-kind, optional aftermarket follow-up visit. Citygate will provide a high-quality report, and then in six months or one year, at your option, return to Monterey County, meet with your team, and evaluate the progress of the County's implementation recommendations in our report. We offer this option because we are passionate about our work product being used successfully and we are serious about our cause: the "Business of Better Government!"

* * *

As President of the firm, I am authorized to execute a binding contract on behalf of Citygate Associates, LLC. Please feel free to contact me at our headquarters office, located in Folsom, California at (916) 458-5100, extension 101 or via e-mail at dderoos@citygateassociates.com if you wish further information.

Sincerely,



David C. DeRoos, MPA, CMC
President

cc: Project Team

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SECTION 1—PROJECT APPROACH

1.1 PROJECT APPROACH

1.1.1 Project Scope, Overview, and Objectives

The scope of Citygate’s proposed study primarily includes all land use and community development functions in the Resource Management Agency (RMA) of Monterey County. The secondary, contextual scope of this analysis includes a high-level review of public works, administration, and other functions within the RMA that are involved in the County’s permitting and approval process. The objective of the study is to review current conditions, analyze opportunities for organizational changes and process improvements that can further enhance customer service, evaluate future service demands, and develop a Strategic Action Plan with a prioritized implementation schedule. Included in this objective is an emphasis on assessing the adequacy and currency of underlying land use and related policies, the allocation and assignment of long range planners vs. current planners, and how the current situation and practices may compound difficulties in the backlog of application and permit processing, consistency, reliability, timeliness, and overall customer and stakeholder service delivery and satisfaction. Also included is an analysis of the functions included under the current structure of the RMA to determine if there are too many or too few functions given the organizational structure in place.

Central to Citygate’s approach will be an emphasis on the following:

Customer Relations First

As public servants, everything we think, say, and do starts with the customer in mind. The RMA has an array of customers and stakeholders, all of whom have different needs. It is important that the services to all customer groups are recognized, constantly monitored, and continuously improved. To best serve these customers, the **credibility, timeliness, predictability, and sensitivity** of the development, permit center special studies, and environmental review processes must be keenly managed. Early assistance and rapid problem-solving techniques can be institutionalized to ensure applications and projects are not unnecessarily delayed. All of this can be achieved within Monterey County’s highly complex and rigorous regulatory framework through a highly transparent process.

Involvement of Stakeholders

The involvement of stakeholders, both internal and external, is essential for the study to have a successful outcome and to produce tailored recommendations that will address the real issues in the community and in the RMA. We have found that there is often a disconnect between what the jurisdiction’s elected officials and staff perceive to be major issues, and what the broader

stakeholders and public believe to be their important issues and needs. The first principle of customer-centered public service is the essential prerequisite of listening to customers, really hearing them, and then aggressively responding to what you hear, see, and learn. In the private sector, successful companies get close to their customers, overspend on learning what their customers want and value, and involve their customers in almost every aspect of their operations. This same principle works in the public sector. Listening is the first and most important step that local governments can take to become more relevant and more valued by their citizen/customers.

We have designed our Work Plan using a combination of face-to-face interviews, online surveys, and focus groups so we will be able to really listen and learn how people feel about land use permitting processes and procedures and various products and services and, most importantly, why they hold those feelings. Our Work Plan will ensure that stakeholders will have the opportunity to participate in the review process in a constructive and confidential manner; not only in the early phases of the study, but also once our preliminary findings and recommendations have been formed.

Citygate Associates has conducted hundreds of surveys and focus groups for local government agencies since our establishment in 1990. This lengthy organizational experience has given us the unique ability to understand our client's needs in terms of employee, customer, and stakeholder feedback, and to provide them with meaningful answers that can be acted upon. Through collecting data from various sources on our previous projects, Citygate has been able to make findings and recommendations with a broad-based view of how the study impacts all stakeholders and other functions in the RMA, and design solutions that are in alignment with national best practices.

Our recommendations, which will be developed through our highly iterative, transparent, and collaborative approach to analysis, will lay the groundwork for interdepartmental efficiency, effectiveness, and *esprit de corps*.

1.1.2 Study Design

We will first analyze the goals of the County's process and overall philosophy of community development and assess the congruence of these critical guidelines with the orientation of the Board of Supervisors as well as the needs of the public and development community. Once this important step is complete, we will evaluate current service needs and historical workload, including assessing overall service levels, workload trends, and ability of staff to meet customer service demands and regulatory requirements.

We will also review current operations, including organizational structure and management systems, scope of operations within each function of the RMA, organizational relationships, allocation of employees and other resources, performance variables, budgeting and funding

County of Monterey, CA

Proposal to Perform a Review of the Resource Management Agency

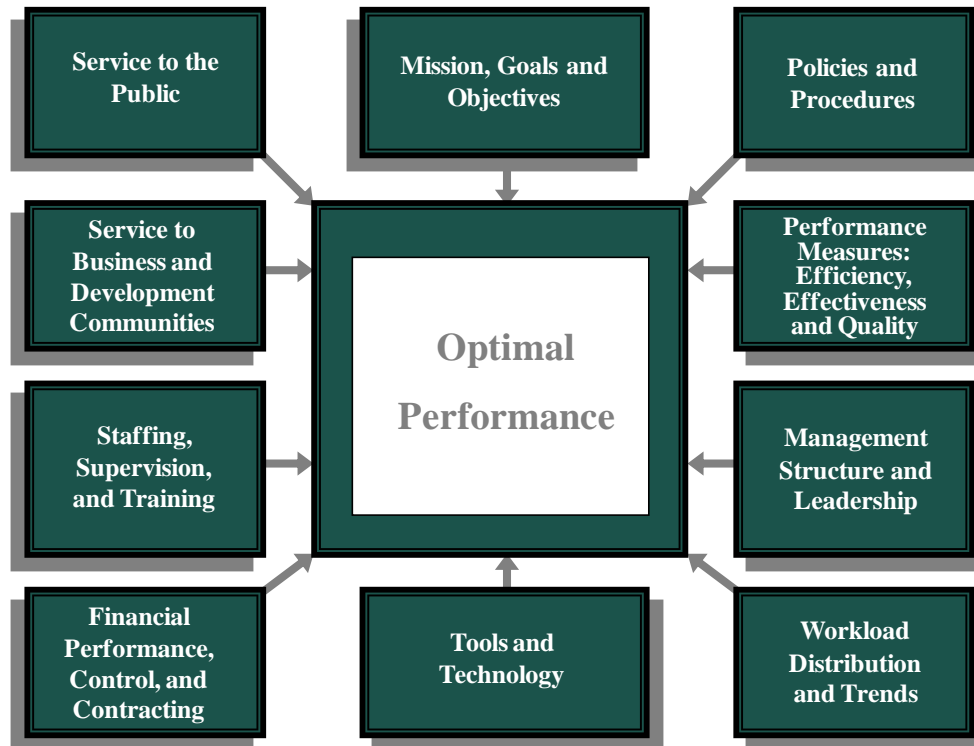
sources, interdepartmental coordination, training, communications, information systems, relationships with citizens, public service inquiries, administration and supervision, job duties, new programs and/or initiatives being considered, opportunities for outsourcing or insourcing, comparability to other local governments, and related aspects to determine if these are in alignment with the RMA's land use and permitting mission and policies.

Our review will next focus on assessing future service demand and determining the most appropriate strategies for enhancing customer service, permit processing standards, interdepartmental coordination, workflow, staffing allocation, technology, and overall organizational design.

We will conclude our review with recommendations that address opportunities for more efficient, timelier, and more accurate processes. Since our assessment is balanced, we will also describe in detail where land use and community development functions are currently operating at peak performance. If our recommendations include restructuring and re-engineering of functions, Citygate will develop a Strategic Action Plan with an implementation strategy for change. This strategy will include an appropriate organizational structure and recommended steps to implement changes.

A profile of our major assessment factors is depicted in the following image.

Profile of Assessment Factors



1.1.3 Mission Statement and Detailed Assessment Factors

Based on our understanding of your environment, Citygate Associates has developed its own mission-oriented questions to guide our efforts in conducting the engagement, as follows:

How best can Citygate Associates deploy the County's investment in this assessment to enhance land use and community development processes when measured by the criteria of efficiency, effectiveness, timeliness, predictability, and transparency?

How can the land use and community development functions maximize organizational performance within a finite resource base?

How can Citygate Associates monitor its own performance so that Monterey County receives an independent, objective, rigorous, and compelling review, while respecting unique local conditions and needs?

Citygate Associates has given considerable thought to these crucial questions and has organized our response accordingly. Our detailed assessment factors are presented on the following page.

Examples of Potential Detailed Assessment Issues

| | | | |
|--|--|--|---|
| MISSION, GOALS AND OBJECTIVES | | | |
| <ul style="list-style-type: none"> ~ Clear definition ~ Current goals & objectives ~ Priorities ~ Decision-making process ~ Relationship to operational policies and procedures ~ Current service level vs. County/Customer needs | | | |
| ORGANIZATIONAL STRUCTURE | | STAFFING LEVELS | |
| <ul style="list-style-type: none"> ~ Effectiveness ~ Assignment of functional responsibilities ~ Decision making authority ~ Spans of control ~ Coordination with other divisions, offices, etc. ~ Coordination with external departments and agencies | | <ul style="list-style-type: none"> ~ Appropriate staffing levels ~ Appropriate allocation of management, supervisors and other personnel ~ Adequate clerical and support staff ~ Full-time, temporary, and contract staff | |
| FINANCIAL CONTROLS | BUSINESS PROCESSES | PERFORMANCE MANAGEMENT | EQUIPMENT AND TECHNOLOGY |
| <ul style="list-style-type: none"> ~ Budget ~ Cost recovery ~ Fee setting methods ~ Effectiveness of accounting system ~ Accuracy and effectiveness of financial information and reports ~ Vendor selection and contract management ~ Liability exposure ~ Outsourcing | <ul style="list-style-type: none"> ~ Efficiency of processes ~ Opportunities for streamlining processes ~ Coordination with other Divisions/Departments ~ Long-term workload forecasting ~ Flexibility of procedures ~ Definition of procedures ~ Internal security | <ul style="list-style-type: none"> ~ Relevance and adequacy of current performance indicators ~ New, innovative performance indicators ~ Timeliness of current performance indicators ~ Relationship of current performance indicators to mission, goals and objectives ~ Efficiency of method of collecting performance data | <ul style="list-style-type: none"> ~ Existing systems capabilities ~ Automation of process, project management, and other programs such as records management ~ Necessity and cost-effectiveness of specialized automated systems ~ Conversion strategies ~ Customization |
| COMMUNICATIONS | PERSONNEL ISSUES | SERVICE DELIVERY | MANAGERIAL EFFECTIVENESS |
| <ul style="list-style-type: none"> ~ Clarity of internal communications between management and staff ~ Clarity of communications between departments ~ Communications between employees ~ Communications between external entities and agencies ~ Communications with public | <ul style="list-style-type: none"> ~ Effective recruitment and selection ~ Appropriate promotion policies and procedures ~ Recruitment and in-service training ~ Turnover ~ Position vacancy rate ~ Background check ~ In-house technical skills | <ul style="list-style-type: none"> ~ Efficiency of workload distribution ~ Accuracy and consistency of information provided to public ~ Timeliness of responses to public inquiries ~ Service responsiveness and accessibility ~ Management controls ~ Health and safety ~ Best practices | <ul style="list-style-type: none"> ~ Management's role and responsibilities ~ Management and supervisory control mechanisms ~ Establishment of service level objectives ~ Accomplishment of strategic and operational planning ~ Effectiveness of budget planning and control ~ Meeting deadlines |

1.2 WORK PLAN

Citygate’s Work Plan to address the scope of work identified is comprised of eight tasks, each with clear task objectives, detailed sub-tasks, and key milestones/deliverables. This Work Plan was designed specifically to address the scope of work focused primarily on the RMA’s land use and community development functions.

Our Work Plan has been developed consistent with our experience in conducting hundreds of organizational assessments and is based on a proven approach used in many similar studies.

Task 1: Initiate and Manage the Project

Task Objectives:

- ◆ To verify the study’s scope and objectives.
- ◆ To finalize the project schedule and Work Plan.
- ◆ To orient employees to our study efforts.
- ◆ To identify key staff and stakeholders who will be involved in the study.
- ◆ To obtain and review documentation to develop an overview of the RMA and its land use and community development functions.
- ◆ To maintain ongoing communications and reporting with the County.

1.1 Meet with the County to Initiate Study:

A key to a successful review is a mutual understanding of the project’s scope and objectives. The members of our team will meet by video conference call with the County representatives to correlate our understanding of the study’s scope and ensure that our Work Plan and project schedule are mutually agreeable. This early effort to clearly define expectations, roles, and lines of communication should result in better focus on substantive issues as the engagement progresses.

For us to be most effective, we will continuously communicate throughout the duration of the study, beginning with our first contact with County staff. Our key message must be that our role is not an adversarial one. Our role is to provide an independent review of the land use and community development functions. We believe our ability to initiate and maintain positive, two-way communication as the study proceeds will result in not only well-supported findings but also a consensus and buy-in among County personnel and

community stakeholders concerning the acceptance of our work and the benefit of implementing our recommendations. It is crucial that the project be viewed by the County as a valuable and worthwhile endeavor.

1.2 Interview Policy Makers and County Management:

To enhance our understanding of the issues at stake in this review, we will meet with and interview representatives as necessary. A goal of the interviews is to orient the consultant team to the history and current context in which the study is taking place. These meetings will also enable us to identify key staff and stakeholders to gain their insights in subsequent tasks.

Due to the County CAO's retirement in mid-September, we believe it will be essential for Citygate to meet with and interview each of the members of the County Board of Supervisors and assigned CAO staff to assure continuity of our firm's client relationship throughout our study duration with Monterey County.

1.3 Conduct Employee Orientation Meeting:

To formally introduce the consultant team to land use and community development employees, we will conduct an Employee Orientation meeting so that they understand the purpose of the study and how we will accomplish that purpose. A second Employee Orientation meeting will be conducted for the remainder of the RMA staff in South County. We will summarize this information in an Orientation Brochure that will be distributed to all employees. This meeting will occur during our first week on site.

We believe our initial meetings with County officials and employees will further reinforce a clear understanding of the project and minimize misconceptions concerning our role, how we plan to accomplish this study, and the potential outcomes of our work. Overall, this approach will help ensure that both the consultant and the County are performing their work in an open, unencumbered, and positive environment.

1.4 Obtain and Review Documentation:

To fully understand land use and community development operations within the context of the RMA, we need to obtain and review a number of documents, including: the mission statement; overall work plan; departmental goals related to staff and applicants; organization charts; process flowcharts; Comprehensive Plan; Zoning Ordinance; budgeted vs. filled vs. assigned positions by work unit; performance targets and measures; position descriptions; plan check procedures; staff training data; inspection scheduling; occupancy permits; staff reports and minutes; applications and forms; operating and work load statistics; fees and charges; expansion design plans; contracts;

specialized reports such as environmental and engineering reports; other policies and procedures; and pertinent County, state, and federal legislation and guidelines.

The initial interviews and document review will help us understand the core workflow processes and procedures of the land use and community development functions. We will also conduct unit walk-throughs, document where processes are functioning well, and where opportunities for improvement exist.

1.5 Monitor Engagement Progress and Completion of Tasks:

We have combined the initial task of starting the project with the ongoing task of monitoring, directing, and administering the project. In addition to ongoing oral progress reports with assigned County staff, we will provide monthly written status reports.

Key Milestones/Deliverables:

- ◆ Orientation Brochure.
- ◆ Monthly written status reports.

Task 2: Communicate with and Involve Internal Stakeholders

Task Objectives:

- ◆ To involve all appropriate employees in the study and provide an opportunity for input.
- ◆ To meet with the key individuals involved in the study, to identify key issues, broad trends, and service delivery goals relevant to the process.
- ◆ To obtain perspective on land use and community development functions and operations from division heads and key employees.
- ◆ To obtain overall employee perspectives through an Employee Survey.

2.1 Conduct Interviews with Key County Personnel:

We will conduct on-site meetings with County personnel identified from land use and community development functions.

2.2 Conduct Interviews with Committee/Commission Members:

We will also meet with members from the Planning Commission, and other advisory boards, commissions, and committees.

Meeting with these key County personnel and committee/commission members will permit us to gain their insights at the start of the review process and provide direction regarding specific issues needing focus.

As necessary, pre-meeting information will be provided to interviewees by email or hard copy to allow for sufficient preparation. Assistance from County staff will be required in scheduling these meetings and providing interview/meeting rooms.

2.3 Conduct Employee Survey:¹

Citygate has found that soliciting the thoughts and opinions of the affected employees early in the study can uncover issues that may need to be explored further in the one-on-one interviews. Citygate will conduct a confidential, internet-based Employee Survey, designed in coordination with County management, to allow all RMA employees the opportunity to participate in the review process in a constructive, confidential manner. The survey will provide opinions and perceptions about mission, goals, objectives, workload, staffing, customer service, training, supervision, technology, etc. To the extent timing makes it possible, Citygate will leverage the results of the County-wide Employee Engagement Survey in the design and analysis of RMA's Employee Survey that Citygate will conduct.

Key Milestones/Deliverables:

- ◆ Employee Survey instrument.
- ◆ Employee Survey findings and analysis (for inclusion in Draft Report).

Task 3: Communicate with and Involve External Stakeholders

Task Objectives:

- ◆ To engage external stakeholders early in the assessment and promote buy-in and co-ownership of the final recommendations.
- ◆ To obtain perceptions of the land use and community development functions from customers and community stakeholders.

¹ The Employee Survey will be internet-based. The County will be responsible for photocopying, distribution, and any other charges relating to hard copy versions of the survey, should that be needed. We assume that the survey will be created and launched in English only. If the County desires the survey to be available in other languages, the extra time necessary to build the additional surveys would be an additional cost.

- ◆ To develop findings and conclusions on service levels.

3.1 Conduct Three Focus Groups of Customer Types:

Citygate will facilitate three focus groups of customers to obtain their concerns and suggestions. The composition of the focus groups will be established in consultation with the County. Focus groups are especially useful in identifying basic issues that can then be asked as part of the broader customer survey process (sub-task 3.2 below). We have found that there is often a disconnect between what the jurisdiction's elected officials and staff perceive to be major issues, and what the broader stakeholders and public believe to be the real issues.

Up to two Citygate consultants will facilitate each focus group. Citygate will require the assistance of County staff to schedule focus groups in coordination with planned on-site trips and to generate address lists and prepare and mail letters of invitation to randomly selected applicants and stakeholders.

3.2 Conduct Customer Survey:²

Citygate will conduct a Customer Survey to provide us with perspectives from the residents and businesses that have used the services provided by the land use and community development functions. Through this survey we will gain an understanding about what services are priorities to the public, what services are meeting expectations, and if there are any gaps between citizen expectations and the delivery of services. The survey will be developed in coordination with the County. Citygate's Customer Survey will use a random sample of customers from the County's Accela data base.

This survey does not require specialized knowledge and can be completed at the convenience of the participant taking the survey. Citygate routinely designs survey instruments and deploys an internet-based survey tool to cost-effectively obtain, analyze, report and present customer, stakeholder, and public perceptions.

Key Milestones/Deliverables:

- ◆ Summary of focus group comments (for inclusion in Draft Report).
- ◆ Customer Survey instrument.

² The Customer Survey is limited to 200 respondents. The Customer Survey will be internet-based and Citygate assumes the County will pay for any necessary postage, photocopying, or data entry. We would require the assistance of the County in providing email addresses (if possible) and developing and mailing invitation letters/postcards and other survey-related materials that may be necessary to encourage survey participation. We assume that the survey will be created and launched in English only. If the County desires the survey to be available in other languages, the extra time necessary to build the additional surveys would be an additional cost.

- ◆ Customer Survey findings and analysis (for inclusion in Draft Report).

Task 4: Conduct Initial Operational and Process Review

Task Objectives:

- ◆ To analyze land use and community development core business processes.
- ◆ To develop an initial understanding of operations, functions, and services related to land use and community development functions.
- ◆ To focus the study on areas where additional analysis is merited.

4.1 Conduct Walk-Throughs and In-Depth Face-to-Face Interviews:

This step includes conducting extensive face-to-face interviews with employees performing the work of the relevant service areas to determine where processes originate and terminate, the lead employees involved, what is done and the work methods employed at each step, how information is routed between and among work units, existing control mechanisms, what forms are used, and the physical layout of the functions and all related support offices.

4.2 Inventory Primary Inputs, Outputs, and Processes:

We will determine where processes originate and terminate, what is done, and the work methods employed at each step. We will look at how information is routed between and among work units, the existing control mechanisms, and the paper documents that support the processes.

4.3 Analyze Case Processing Systems:

Once each major system or case process is identified, an inventory of planning, building, environmental, code enforcement, and other case processing system inputs, outputs and processes used will be developed. This inventory, combined with process flow charts, will enable us to identify bottlenecks, redundant systems, inadequate controls, inefficient procedures, and opportunities for streamlining.

4.4 Assess Operational Issues:

In the course of our process analysis and focus groups, surveys, and interviews, we anticipate developing findings and conclusions on: 1) the amount of focus needed for each phase of the development process; 2) the responsiveness and assistance of County staff; 3) the completeness and accuracy of application review; 4) turn-around times; 5)

the helpfulness of staff in describing needed changes in plans; 6) consistency of information and interpretations by staff; 7) scheduling of plan checks and inspections; and 8) the knowledge level and accuracy of plan checks and inspections.

4.5 Identify Focus for Additional Analysis:

At the conclusion of Task 4, we will have developed our initial understanding of the land use and community development operations, functions, and services provided by the County. In addition, Tasks 2 through 4 serve as our diagnostic effort so that we identify the areas where additional analysis is merited and will offer future returns on the County's investment in the study. This will determine the depth of our focus on operational issues in Task 5.

Key Milestones/Deliverables:

- ◆ Initial operational findings and conclusions.

Task 5: Conduct In-depth Operational Analysis

Task Objectives:

- ◆ To perform detailed operational analyses where the investment appears to have merit.
- ◆ To identify areas where organizational performance and service levels can be enhanced.
- ◆ To assess how technology is currently used and how it might be better utilized.

5.1 Review Organizational and Management Structure from Top to Bottom

- a. Reporting relationships.
- b. Span of control for both managers and line staff.
- c. Staffing levels, including absent or redundant positions, as well as budgeted vs. filled vs. assigned positions by work unit.
- d. Ratio of administrative staff to professional staff.
- e. Challenges with recruitment and retention of staff.
- f. Number of functions in the RMA and whether there are too many or too few given the organizational structure in place.

5.2 Review Operations

- a. Assess the adequacy and currency of existing documented long-range planning policies and determine the extent to which inadequate policy development and/or adoption is compounding the timeliness, consistency, and reliability of application processing and satisfactory service delivery.
- b. Review allocation of County financial resources and Board-assigned priorities for the land use and community development functions and identify areas where the County should focus on increasing or decreasing financial resource allocation. This can be accomplished through benchmarking or other comparative analysis with best practices.
- c. Review the County's service delivery models and recommend alternative service delivery models, as appropriate, that will maintain or increase service levels while lowering cost of service.
- d. Develop criteria for eligibility and structure for "fast tracking" review of development projects. Investigate opportunities for expedited processing with varying fee structures.
- e. Analyze land use permitting processes. Identify any inefficiencies and recommend opportunities to streamline project review and permit issuance. Incorporate consideration of:
 - i. Improving communication with applicants, including requirements for complete applications.
 - ii. Establishing administrative review with clear and robust opportunities for public input when applications meet County policies and design guidelines.
 - iii. Reviewing standard conditions and approval process.
 - iv. Identifying resources to develop and maintain a portfolio of available properties ready for development as an advanced planning tool for property owners, developers, and area residents.
 - v. Evaluating efficiency of existing efforts to provide site selection assistance, business liaison services, pre-application meetings, quick response, and fast track permitting and review.

5.3 Review Outsourcing and Insourcing Opportunities (Optional)

As an option separately costed in Section 4 of this proposal, for Building and Planning only, Citygate will conduct an outsourcing assessment including the:

- a. Identification of key opportunities by function.

- b. Industry comparison.
- c. Inclusion of specific and comprehensive recommendations.

5.4 Review Housing and Economic Development Structural Alignment (Optional)

As an option separately costed in Section 4 of this proposal, Citygate will assess the current organizational alignment of both housing and economic development and identify the pros and cons of realigning those functions within the RMA.

5.5 Evaluate Information Technology

- a. Identify opportunities to leverage technology to improve efficiencies and customer service.
- b. Evaluate existing systems (Accela, project management, etc.) to examine their efficiency and effectiveness. The general evaluations will be conducted from the perspectives of internal staff and external users along with our own knowledge and expertise. We will assess the level at which staff have been trained on these automated platforms. Also, Citygate will evaluate the potential to utilize other e-government technologies and apps for possible use by the County to improve customer service.
- c. Recommend new products or applications that match RMA needs, especially for project management and public outreach.
- d. Propose new equipment/technology that could increase productivity, replacing current equipment/technology or freeing staff to be utilized elsewhere in the organization.

5.6 Identify Best Management Practices (BMPs) and Performance Measures

- a. Identify level of activity and performance metrics for each division.
- b. Assess organizational activity and include benchmarking against accepted standards.

5.7 Evaluate Customer Service

- a. Evaluate communications with internal and external customers, considering the responses to the Customer Survey and the comments and opinions expressed through focus groups.
- b. Evaluate service request response system.
- c. Assess cash management practices.
- d. Identify cost recovery and revenue opportunities.

- e. Review opportunities for cost reductions without reduction in service.
- f. Consider opportunities for increased service levels despite marginal cost increases.
- g. Develop metrics and evaluation of customer satisfaction.
- h. Establish reasonable response times for service requested by the public.

5.8 Evaluate Trend Analysis

- a. Identify relevant opportunities to prepare the organization to meet future industry challenges.
- b. Develop a management and resource approach to prepare and adjust for natural cycles in planning and building applications.

Key Milestones/Deliverables:

- ◆ Findings and recommendations on each Scope of Work area identified by the County.

Task 6: Present Draft Findings and Recommendations and Prepare Draft Report

Task Objectives:

- ◆ To review preliminary findings and recommendations with County staff and stakeholders.
- ◆ To review Draft Report and proposed implementation plan with County staff.

6.1 Review Preliminary Findings with the Staff:

We will present a summary of preliminary findings and recommendations to the County before preparing the Draft Report by involving RMA executives and CAO staff. Since our recommendations may include changes to support and maintain new processes and procedures, it is important to create mutual understanding before writing the Draft Report.

6.2 Present Preliminary Findings to Stakeholders in Two Focus Group Meetings:

We will present a summary of preliminary findings and recommendations to select external stakeholders, allowing them sufficient time to provide input on our preliminary conclusions before we prepare the Draft Report.

6.3 Brief County Board of Supervisors on Draft Findings and Recommendations (Optional)

As an option, the County may wish to ask Citygate's senior Project Team members to present our preliminary findings and recommendations to the County's Board of Supervisors. This separate meeting, scheduled on a day following a week or two after the completion of the sub-tasks immediately above, is costed separately in Section 4 of this proposal. As an alternative for the County's consideration, this presentation can occur after the Draft Report has been completed and delivered.

6.4 Prepare Draft Report and Review with County:

We will then prepare a Draft Report including recommendations and the proposed implementation strategy. This report will be provided to appropriate County personnel, as needed, to allow sufficient time for review and discussion of any areas that require further clarification or amplification. The written report will detail organizational capabilities, challenges, goals, objectives for maintaining and improving services, and development of performance measures to quantify progress.

The report will outline an Action Plan for implementation that addresses each of the areas discussed in our Work Plan, including:

- ◆ Development of departmental/functional goals and target objectives for moving forward.
- ◆ Description of recommended actions to achieve goals and objectives including, organizational changes, relocation or co-location of functions, investments and new or modified laws or regulations.
- ◆ Cost or savings of proposed changes and enhancements to the current system.
- ◆ Establishment of performance measures relative to goals and objectives.
- ◆ Identification of the process needed to implement recommendations including actions needed by the Board of Supervisors and the County CAO.

Our report will emphasize and focus on implementation. Our specific recommendations will be presented as a summarized Strategic Action Plan in tabular form beginning with a description of each proposed recommendation, followed by a priority ranking of their importance, a specific timeline for implementation, the benefits that are anticipated from implementing the recommendations, and then the identification of the individual or the entity that is to be held responsible and accountable for implementing the recommendation.

Citygate Associates does not work off a long list of preconceived recommendations that are recycled from project to project. Each project is unique and approached with a clean slate. Citygate emphasizes the quality and implementability of its recommendations and the ability of our clients to use the recommendations in the report to improve their efficiency and effectiveness and satisfy their customers, citizens, stakeholders, and interest groups.

Key Milestones/Deliverables:

- ◆ Preliminary Findings and Recommendations Report.
- ◆ Draft Report.

Task 7: Prepare and Present Final Report

Task Objectives:

- ◆ To obtain written feedback on the Draft Report from the County.
- ◆ To produce and present the Final Report.

“We work with consultants, obviously, all the time, but the work that Citygate did on this report is some of the best I’ve seen in my tenure here.”

*-Mr. Walt Ekard
Former San Diego County CAO*

7.1 Revise Draft, As Necessary.

Once we receive feedback on the Draft Report from the County (in the form of one compiled document with the County’s written comments), we will make the necessary changes to finalize the report.

7.2 Produce and Optionally Present Final Report:

As an option, we will present the Final Report to the County in a public meeting, identifying proposed process improvements, appropriate organizational structures, and recommended steps to implement change.

Key Milestones/Deliverables:

- ◆ Final Report.

Task 8: Six-Month Implementation Follow-up

Task Objectives:

- ◆ Offer unique, one-of-a-kind aftermarket care and service.
- ◆ Re-evaluate recommendations in Final Report.
- ◆ Monitor the outcomes and results and recommend any needed mid-course corrections.

8.1 Proposal for Aftermarket Service:

In six months or one year, at your option, Citygate would like to meet with the County's staff and appropriate representatives from the community and then re-evaluate each of the recommendations in the report. We can provide this aftermarket service because we have a high degree of confidence in the quality and implementability of the recommendations that we will deliver and we have an outstanding track record for quality, reliability, and dependability with our past clients. However, sometimes there are unintended consequences, misunderstandings about a recommendation, or conditions in the community may have changed. We believe that there is real value in monitoring the outcomes and results and making any needed mid-course corrections.

If the County is not interested in Citygate's proposal for aftermarket service, then all the objectives and sub-tasks in Task 8 will be removed from our proposal.

8.2 Determine What is Working; Provide Solutions for What is Not:

At a cost to be determined, we will evaluate what is and is not working, and what additional efforts may be necessary to produce the desired outcomes for our original recommendations.

8.3 Provide Follow-up Report:

With staff assistance, Citygate will review and evaluate the County's implementation efforts and then prepare a concise written report summarizing the status and progress which has been and is being made toward implementing the recommendations along with the recommended remedial adjustments that we believe to be warranted.

Key Milestones/Deliverables:

- ◆ Follow-up report on recommended mid-course corrections.

1.3 TENTATIVE PROJECT SCHEDULE

Citygate is prepared to start this engagement upon execution of a contract. Based on our experience with similar reviews, we expect this study to take approximately five months to complete. Below, Citygate presents a sample five-month schedule.

Sample Project Schedule

| Task | Month 1 | Month 2 | Month 3 | Month 4 | Month 5 | Month 11 |
|---|---------|---------|---------|---------|---------|----------|
| 1: Initiate and Manage the Project | ■ | ● | | | | |
| 2: Communicate with Internal Stakeholders | ■ | ● | | | | |
| 3: Communicate with External Stakeholders | ■ | | ● | | | |
| 4. Initial Operational and Process Review | | | | ● | | |
| 5: In-Depth Operational Analysis | | | | ■ | | |
| 6: Present Draft Findings and Report | | | | | ● ● ● | |
| 7: Prepare and Present Final Report | | | | | | ● |
| 8: Six-Month Implementation Follow-Up | | | | | | ● |

- On-site visit
- Optional on-site visit

1.4 SUPPORT AND INFORMATION REQUIRED FROM THE COUNTY

We assume the County support staff will assist with obtaining documents (sub-task 1.4), scheduling interviews, obtaining necessary contact addresses, and providing office space for on-site meetings. Citygate will require the assistance of County staff to schedule focus groups (sub-tasks 3.1 and 6.2) and to generate address lists and prepare and mail letters of invitation to randomly selected stakeholders. We will also require the assistance of the County with the employee and customer surveys (sub-tasks 2.3 and 3.2) in distributing invitations, which, for the customer survey, may entail mailing/emailing/posting invitations and other survey-related materials that may be necessary to encourage survey participation.

SECTION 2—PROJECT TEAM

2.1 PROJECT TEAM EXPERIENCE

The qualifications of the Project Team are critical as it is the expertise and the capabilities of the consultants involved in the project that ultimately determine the success of the project. We have carefully assembled the team members to provide the knowledge, depth, judgment, and sensitivity required to perform this engagement. Please note that the role of each team member is described in italics at the end of their biographical paragraph. Citygate’s Project Team members adhere to the Code of Ethics found in **Appendix A**. Resumes can be found in **Appendix B**.

David DeRoos, MPA, CMC, Citygate President



Mr. DeRoos is the President of Citygate Associates, LLC and former Deputy Director of the California Redevelopment Association. He earned his MPA degree from USC. He has over five years of operational experience as a local government administrator in economic development, redevelopment, land use planning, budgeting, and personnel, and 30 years of consulting experience performing operations and management reviews of local government functions. Before joining Citygate in 1991, he was a Senior Manager in the State and Local government consulting division of Ernst & Young. He has directed all Citygate’s community development reviews.

Mr. DeRoos is responsible for ensuring that the project is conducted smoothly and efficiently, within the schedule and budget allocated, conducting high-level interviews, participating in key meetings, reviewing deliverables, and determining that all work products meet Citygate’s and the client’s standard of quality. Mr. DeRoos also conducts a post-engagement survey and phone call to obtain client feedback on their perceptions of the project and the usefulness of the engagement and report going forward!

Evert Palmer, MPA, ICMA-CM, Project Manager



Mr. Palmer served the City of Folsom for 23 years as Assistant Finance Director/Information Technology, Director of Administrative Services, Assistant City Manager, and City Manager, retiring in 2018 after 7 years as the City’s chief executive. Mr. Palmer served Folsom during a time of significant growth, contributing to and completing two annexations that increased the City’s size by more than 3,500 acres and 11,000 housing units. Using alternative service delivery, contracting, efficiency measures, and public/private partnerships, Mr. Palmer successfully led Folsom, a full-

service city, through the Great Recession, guiding the City Council and the community through a strategic restructuring of City operations that not only retained the City's high-quality services and infrastructure, but also improved balance sheets in the general, internal service, retiree health, solid waste, waste water, and water funds. During this same period, Mr. Palmer aided several community organizations through their own restructuring, increasing their self-reliance and reducing their requirements for public funding. Mr. Palmer's work in economic development, in collaboration with the Folsom Chamber of Commerce, led to the location and expansion of several high-technology employers to Folsom, for which he was awarded the Folsom Chamber of Commerce's Chairman's Award in 2014.

Mr. Palmer is an International City/County Management Association Retired Credentialed Manager, having earned and held this designation since 2011. Mr. Palmer earned a Master of Public Administration degree from Golden Gate University, a Bachelor of Arts in Organizational Leadership degree from Chapman University, and a Certificate of Achievement in Municipal Leadership from the University of Southern California School of Policy, Planning, and Development. Before his service to the citizens of Folsom, Mr. Palmer served as an information technology professional in both the public and private sector and worked on many large-scale IT implementations in the banking, corporate, general government, and public safety sectors.

Mr. Palmer will provide day-to-day management of the project, including detailed planning and scheduling of tasks, preparation of work products, and delegation of activities to project consultants. Mr. Palmer will also conduct interviews, perform various high-level and detailed analyses, and make presentations to County leadership.

Jane Chambers, ICMA-CM, MPA, Local Government Specialist / Lead Consultant



Ms. Chambers is a Senior Associate with Citygate Associates. Ms. Chamber's 25 years in local government includes executive leadership as a City Manager, Assistant City Manager, Public Works Director, and Human Resources Director in full-service urban and suburban communities (Burbank, CA; Daly City, CA; San Bruno, CA; and Burnsville, MN). Her current and recent Citygate projects include community development reviews for Goleta, CA, Healdsburg, CA, and Salt Lake City, UT; a line department operational and financial review for Contra Costa County and San Mateo County; and citywide reviews for West Hollywood and Angels Camp, CA.

Ms. Chambers began her local government career with the City of Burbank, where she worked directly with Public Works Engineers, the finance team, streets, fleet, and corporation yard personnel. In addition, she served a two-year term as Interim Public Works Director for the City of San Bruno, CA, where she was responsible for assuring that previously delayed capital

improvement projects totaling \$22 million were completed on time and on budget. These projects included a variety of streets, sidewalks, water, wastewater, and facilities.

Ms. Chambers served as Ukiah, CA City Manager for seven years, retiring in June 2015, and then served as Interim Assistant City Manager for the City of Sunnyvale, CA, and has recently again provided interim support to the City Manager’s office in Sunnyvale during its permanent Assistant City Manager search process. Throughout her career, Ms. Chambers successfully implemented strategic realignment of service delivery systems, including financial resources, to achieve improved and sustainable programs for citizens.

Ms. Chambers has expertise assisting elected officials, city staff, and community stakeholders identify and achieve desired goals in complex financial and operational environments, as well as operational and service delivery experience in economic and community development, public works, parks and recreation, housing, human resources, water, sewer, and solid waste. Ms. Chambers is an ICMA Retired Credentialed Manager, having earned and maintained this recognition annually for more than a decade, and earned a Master of Public Administration Degree from UCLA, and an undergraduate degree in Political Science from California State University, Northridge.

Ms. Chambers will conduct interviews, co-author the report, perform various analyses, and co-facilitate meetings, focus groups, and presentations.

Julee Conway, MBA, CPRP, Parks and Recreation Specialist



Ms. Conway has over 25 years of municipal and county government experience. Her career focus has been the professional management of service-oriented county and municipal recreation, parks, and community service departments. Drawing on her prior career experience in commercial banking and her post-graduate business degree, she has applied knowledge of how to successfully utilize sound operational, customer service delivery, and fiscal management practices in the government setting.

These practical skills proved invaluable during the 2008–11 recession as she, serving as Director, resourcefully guided the City of Reno Parks, Recreation, and Community Services Department, which resulted in a more sustainable service model. In addition, her nationwide involvement and awareness of fitness and wellness trends in the parks and recreation industry led to the City of Reno receiving regional and national recognition for its programs, services, and creative funding and program service initiatives. In 2016–17, she successfully led a citizen-based statewide legislative process through the Nevada Legislature that resulted in the ratification of Assembly Bill 379 and its subsequent signing by the Governor into law on July 1,

2017. The bill authorized, for the first time, the formation of Parks, Trails, and Open Space Special Districts in the State of Nevada.

Having directed numerous local government parks and recreation agencies, she has extensive local, regional, and national exposure and insight related to all facets of community engagement and consensus building associated with creating, developing, managing, and promoting a sustainable and nimble recreation, parks, and community services agency. Ms. Conway earned a master's degree in business administration and a Bachelor of Science degree in park administration. She is a member of the National Parks and Recreation Association and maintains her national certification as a Certified Park and Recreation Professional #35101. Ms. Conway has also been responsible for urban tree programs and was a citizen member of an Urban Forestry Commission appointed by the Mayor.

Ms. Conway will lead the review of Parks and conduct on-site interviews.

John Hester, MCRP, AICP, Planning and Building Specialist / Technical Advisor



Mr. Hester has over 30 years of experience in planning and community development functions within local government, many as an executive. Mr. Hester was the Community Development Director and Redevelopment Agency Administrator for the City of Reno, Nevada. He later served as Assistant City Manager. During his tenure at Reno, he significantly streamlined processes in the Building, Planning, Engineering, and Code Enforcement Divisions. Prior to joining the City of Reno staff in 1998, Mr. Hester served Washoe County, Nevada for over 17 years in various capacities including Community Development Director, Acting Water

Resources Director, and Director of Comprehensive Planning. During his tenure with Washoe County, Mr. Hester was responsible for creation of the first Regional Open Space Plan for the County, as well as drafting and successful approval of State of Nevada open space funding legislation which has now been utilized in additional Nevada counties. He was a founding member of the Nevada Land Trust Board of Trustees and still serves as an Advisory Board member.

Mr. Hester is currently the Chief Operating Officer for the bi-state Tahoe Regional Planning Agency (TRPA). John has a strong track record of process improvement and delivering customer-centric outcomes. At the TRPA, he removed an application review backlog of 150 applications and updated the 25-year-old Lake Tahoe Regional Plan (which won APA awards).

He was named “Planner of the Year” by the Nevada Chapter of the American Planning Association in 1995 and “Public Administrator of the Year” by the Sierra Nevada Chapter of the American Society for Public Administration in 1995.

Mr. Hester will contribute his planning and building expertise as needed throughout the project's duration as an off-site Technical Advisor.

Connie Jackson, Local Government Specialist



Ms. Jackson has over 32 years of local government management experience. She served as City Manager for the City of San Bruno in the San Francisco Bay Area for fifteen years and the City of Fort Bragg in the coastal Mendocino County for four years. She also served for more than a decade in the Office of the City Manager in the City of Hercules, which was at the time one of the fastest growing communities in the state, and served as Assistant City Manager, Parks and Recreation Director, and as manager for the City's Budget, Redevelopment, and Economic Development functions. Ms. Jackson has extensive experience developing and implementing successful fiscal, organizational, and operational strategies to resolve serious financial deficit situations, including the sharing of core municipal services with other local agencies, restructuring of service delivery systems, and development of public engagement strategies and programs.

Ms. Jackson is a member of the International City/County Managers Association (ICMA). She was recognized by the League of California Cities City Manager's Department as the 2012 City Manager of Distinction. She has presented before a wide variety of audiences on the City of San Bruno experience and pipeline safety. Ms. Jackson holds a Bachelor of Arts degree from the University of California at Berkeley in Social and Cultural Anthropology and completed coursework for a Master of Business Administration degree also at UC Berkeley.

Ms. Jackson will review housing and economic development structural alignment if selected.

Dr. Nicholas Pinhey, DPA, Public Works Specialist / Technical Advisor



Dr. Pinhey has over 33 years' experience in the management of public works and municipal utility departments and has served as a Director of Public Works or Assistant Public Works Director for most of his career. He recently served as Interim General Manager for the Stanislaus Regional Water Authority. Dr. Pinhey has managed full-service public works departments in cities serving populations of 45,000 to 215,000. Dr. Pinhey has experience in water and wastewater utility operation and management, direct experience in all aspects of Public Works maintenance activities and has directed engineering functions and major capital projects. He was responsible for reorganizing three municipal public works departments during his career and his responsibilities included analyzing organizational structure and function, the preparation of staff reports with alternatives, presenting the recommendations to city councils, and implementing the

reorganizations. Dr. Pinhey is certified by the State of California as a wastewater treatment plant operator Grade 4, surface water treatment plant operator Grade 3, and a water distribution system operator Grade 3. Dr. Pinhey is also a frequent speaker at water/wastewater conferences and professional training events. He has extensive experience in the training of professional and technical competencies in public utilities. He is also an adjunct faculty member in the Graduate Public Administration Program at California State University, Stanislaus.

Dr. Pinhey will provide public works expertise as needed throughout the project's duration as an off-site Technical Advisor.

Andrew Green, MBA, Fiscal Specialist



Mr. Green has over 35 years of experience in all aspects of municipal finance, including as a professional manager. He has had primary responsibility for the development and monitoring of citywide budgets for four municipalities, with total budgets ranging from \$70 million to \$680 million. He developed and fine-tuned long-range financial plans for multiple municipalities, including playing a lead role in taking the City of Pasadena from a \$10 million General Fund operating deficit to a \$5 million General Fund operating surplus. While serving as Pasadena's Finance Director, he served Paul Arevalo and other board members of the Rose Bowl Operating Company during the Pasadena Rose Bowl renovation project by presenting financing and fiscal analysis. Mr. Green has extensive experience with all aspects of the operations of a municipal finance department including, but not limited to, financial reporting/accounting and analysis, accounts payable/receivable, debt issuance/management, payroll, investments, business licensing, risk management, purchasing, grant management, labor relations, and budgeting. Additionally, Mr. Green has developed and implemented finance department strategic plans in several jurisdictions. He has also served on many government finance organizations including California Society of Municipal Finance Officers Chapter Co-chair, League of California Cities Employee Relations Department representative, and the State of Nevada Committee on Local Government Finance committee member. Mr. Green is currently directing a fee/charges and cost recovery review for Community Development Department activities for Clark County, WA.

Mr. Green will provide financial expertise to Citygate's Project Team members and conduct fee/charge and/or cost recovery analysis, should that be required.

Chief Samuel Mazza, CFC, CFO, EFO, Local Client Coordinator



Chief Mazza is a Senior Fire and Emergency Services Specialist with over 40 years of fire service experience. He is the retired Fire Chief of the City of Monterey, California, where he oversaw a successful consolidation of fire services with the City of Pacific Grove. Prior to his service with Monterey, Chief Mazza spent over 30 years with CAL FIRE in numerous assignments spanning state, county, and fire and special district services. He has extensive collaborative and command experience, including appointment as the Incident Commander of a Statewide Type-1 Incident Management

Team. Chief Mazza is also a California state Certified Fire Chief, CPSE Chief Fire Officer, Executive Fire Officer, and National Fire Academy instructor. Chief Mazza is a skilled project manager for Citygate and directed two previous projects for Monterey County, including the Winter Storm Response Plan Update (2019) and the Office of Emergency Services Tabletop Exercise for Elkhorn Slough (2015).

Chief Mazza will serve as the local client coordinator and be available to attend any urgent on-site meetings throughout the study.

2.2 PROJECT TEAM AT A GLANCE

Citygate’s unmatched Project Team is highlighted below, along with noteworthy positions and years of local government practitioner experience.

David DeRoos, MPA, CMC | 38 Years (Consultant) | 7 Years (Local Government)

Citygate – President; completed 500+ projects

Evert Palmer, MPA, ICMA-CM | 23 Years

Folsom, CA – City Manager, Director of Admin. Services, Asst. Director of Finance/IT

John Hester, MCRP, AICP | 30 Years

Tahoe Regional Planning Agency – COO; Washoe County, NV – Community Development Dir.; Reno, NV – Asst. City Manager, Com. Dev. Director

Dr. Nicholas Pinhey | 33 Years

Modesto, Tracy, and Merced, CA – Public Works Director; Stanislaus Regional Water Authority – Interim GM; CA Certified Grade IV Wastewater Treatment Plant Op.

Jane Chambers, MPA, ICMA-CM | 25 Years

Ukiah, CA – City Manager; Sunnyvale, CA – Interim Asst. City Manager; Other Cities – Public Works Director, HR Director

Julee Conway, MBA, CPRP | 25 Years

Reno, NV – Director of Parks, Recreation, and Community Services Department; Gresham & Corvallis, OR – Parks & Recreation Dir.

Connie Jackson | 32 Years

San Bruno, CA – City Manager; Fort Bragg, CA – City Manager; Hercules, CA – Parks/Recreation Director

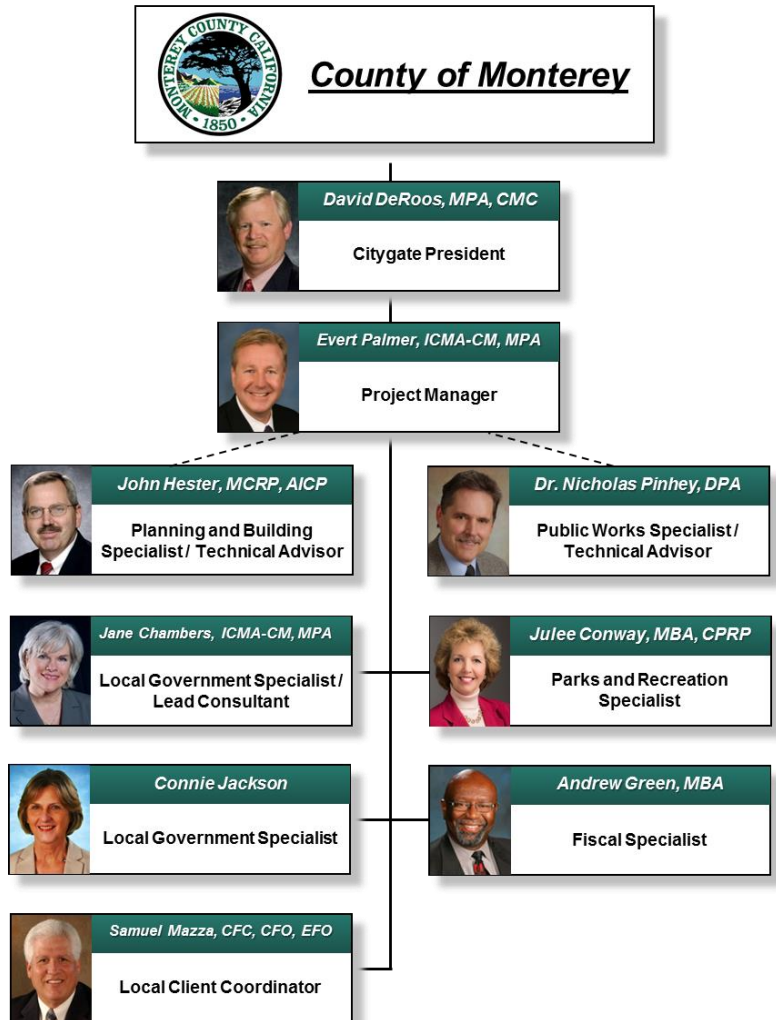
Andrew Green, MBA | 35 Years

Pasadena, Rialto, and San Bernardino, CA – Finance Director; Reno, NV – Finance Director

Chief Samuel Mazza, CFC, CFO, EFO | 40 Years

Monterey, CA – Fire Chief
Directed two prior projects for Monterey County

Project Team Organization Chart



Also joining Citygate’s Project Team, in a non-compensated role as Special Advisor, is Sarah Aghassi, who currently serves as the Deputy Chief Administrative Officer / General Manager for San Diego County’s Land Use and Environment Group (LUEG). Reporting to the County’s Chief Administrative Officer, Ms. Aghassi provides executive leadership of an annual budget of more than \$650 million, with 15 direct reports and a total structure of 1,945 staff across seven departments, including Public Works; Planning and Development Services; Environmental Health; Agriculture, Weights, and Measures; and Parks and Recreation.

SECTION 3—CITYGATE QUALIFICATIONS

3.1 CITYGATE QUALIFICATIONS

Citygate is dedicated to providing consulting and improvement services for public sector agencies. Citygate’s mission is “The Business of Better Government.” Citygate provides land use and community development consulting, and through our “Virtual County Hall” model, also provides consulting services across the full array of local government functions. Citygate Associates is staffed with seasoned consultant-practitioners, the vast majority of whom are recently retired city managers, community development directors, public works directors, and department heads with 25+ years of municipal experience and a masters or doctorate degree.

3.2 CITYGATE’S RELATED PROJECT EXPERIENCE

As indicated in our cover letter, Citygate has conducted over 500 consulting reviews for over 300 government agencies primarily in the West, with a specialization in all aspects of consulting related to land use, community development, and other functions found in an RMA. We have also conducted well over 30 organizational and management studies focused exclusively on land use and/or community development. For purposes of this proposal, we first present our related projects followed by the six projects we have performed for Monterey County.

3.2.1 Related Land Use and Community Development Reviews

City of Salinas, CA – Community Development Organizational Analysis and Strategic Plan

Citygate performed an organizational analysis and developed a strategic action plan for the City of Salinas Community and Economic Development Department, including the Building Division. The objective of this study was to review current conditions, evaluate future service demands, analyze opportunities for organizational changes and process improvements to further enhance customer services, and develop a strategic action plan with a prioritized implementation schedule.

Goleta, CA – Independent Operational and Organizational Assessment for the Planning and Environmental Review Department

Citygate recently performed an Independent Operational and Organizational Assessment for the Planning and Environmental Review (PER) Department of the affluent City of Goleta, CA with an intensely active community involved in all aspects of development projects. The strategic project objective was enhancing organizational operations for current and future needs. Additionally, to help guide the incoming PER Director once that position was filled, the review

County of Monterey, CA

Proposal to Perform a Review of the Resource Management Agency

was also designed to make strategic recommendations that were the most urgent and most achievable given the many pressures and time constraints experienced by the Department and City during that time.

City of San Luis Obispo, CA – Organizational Assessment of the Community Development Department; Technical Assistance for Implementation of the Community Development Department’s Strategic Action Plan; Customer Service Consulting for the Community Development Department’s Building and Safety Division

Citygate completed an organizational assessment of the San Luis Obispo Community Development Department including a review of Building and Safety, Administration, Development Review, Long-Range Planning, and a review of the key elements of the City’s Economic Development Program. The Community Development Department has already implemented 90 percent of the recommendations and credits these efforts to maintaining and achieving high levels of service.

Citygate was also selected to assist the City with a review of the “Road Map for Implementation,” integration of the Public Works Department permitting processes, and identification of opportunities to improve efficiency of the City’s development review permitting process.

Finally, Citygate also provided customer service consulting services for the Community Development Department’s Building and Safety Division, and in so doing Citygate identified opportunities for improvement and ongoing performance management.

County of San Diego, CA – Analysis of Reorganizational Structures; Organizational Analysis of the Dept. of Planning and Land Use

Citygate assisted San Diego County’s newly-formed Planning and Development Services Department with an organizational change management program emphasizing customer-centric service.

Analysis of Reorganizational Structures – Previously, Citygate was retained to develop and analyze reorganizational structures of the departments and functions involved in the County’s development permit review process as they prepared for relocation into a new facility. Our review focused on identifying a customer-friendly and cost-effective approach to organizing the functions and departments around the development permit review process, rather than having the process adapt to the existing and historical multi-departmental operational silos.

Organizational Analysis of the Department of Planning and Land Use – Previously, Citygate performed an organizational and functional analysis of the Department of Planning and Land Use (DPLU) and associated land development services (including Building Services) to: (1)

ensure the most efficient use of staff time and resources; (2) improve customer service; (3) improve the quality and completeness of work; and (4) ensure that the land development process promotes safe and livable communities. To accomplish these objectives, Citygate analyzed the policies, procedures, management and operations of the programs, and designed improvements for the future. Permitting processes included the provision of all utilities, and involved the engineering functions within the Public Works Department and the Land Development Division. As part of Citygate's review, an employee survey was conducted as well as a customer survey, and recommendations were made for improving the Department's existing customer satisfaction survey forms.

Many challenges affected DPLU, including a need to: streamline internal processes and provide seamless processing as permits moved between departments and agencies; create more reliable and predictable regulatory outcomes; improve staff productivity and accountability; and enhance relationships within the development community, local residents, and special interest stakeholders.

Citygate provided nearly 80 recommendations to: improve organizational capacity and clarify strategic direction; provide appropriate performance measurements to monitor customer service delivery, organizational and individual staff productivity; reorganize the structure to better align reporting relationships, decision making, and streamline processes; and identify opportunities to generate more revenue to offset operating costs. Our recommendations enhanced organizational productivity and prepared the Department for significant downsizing.

Sacramento County, CA – Performance Audit of Planning and DERA

Citygate completed a performance audit of Sacramento County's Planning and Environmental Review and Assessment departments. This study provided an independent, objective, rigorously analytical analysis of the policies, procedures, management, and operations of the programs, and designed a constructive, forward-looking, and creative strategy for improvement. This project involved a standard performance audit, including how to support the Municipal Services Agency's goal to decentralize planning functions and empower neighborhood involvement through the expanded use of community planning councils and other methods. Extensive stakeholder, resident, applicant, and employee contact was achieved through interviews, focus groups, and internet-based surveys. We also identified "best practices" in other communities, reviewed performance indicators, and developed recommendations for improvement.

In addition to enhancing applicant and residential services, the streamlining, improved leveraging of available technology, and staff productivity enhancements prepared the departments for improved staff accountability, performance metrics, and reliably/predictably enhancing the quality of customer service goals.

Clark County, WA – Multiple Reviews—Conducted Since 2000

Performance Audit of the Community Development Department – Citygate conducted a Performance Audit of the Community Development Department. The study included the divisions of Long-Range Planning, Customer Service, Development Services, Building, Engineering, Fire and Code Enforcement. Citygate analyzed cost for service and made appropriate recommendations. As part of Citygate’s review, an Employee Survey was conducted as well as a Customer Survey. The goal of the project was to provide recommendations to support increased efficiencies, effectiveness, timeliness, and customer service. The review focused on performance measurement, fee methodologies, staff development, and process streamlining. This study was followed by a strategic planning project using performance information from the first study to create a 5-year strategic plan for the affected Departments.

In September 2002, Citygate was commissioned to re-administer the Customer Survey to determine if customer service and perspectives had improved since the implementation of our recommendations. The results indicated that customer satisfaction had increased as a result of the implementation of recommendations to increase customer service.

Organization Analysis of Permit Services Division – Citygate conducted an organization analysis of Clark County’s Permit Services Division of the Community Development Department. The objective of the study was to analyze the policies, procedures, management, and operations of the Permit Services Division and to make recommendations for improving the development and permitting related services provided by the County to its citizens and stakeholders. To accomplish this objective, we evaluated the Permit Services organizational model and management systems, organizational relationships, allocation of employees and other resources, data management, personnel management and training, records management, communications, information systems, facilities and equipment, fiscal management, relationships with citizens, employee morale, and related aspects to determine if these are in alignment with the departments’ mission and policies.

Evaluation of Permit Center Operations – Citygate recently evaluated the Permit Center Operations of Clark County, WA, a unit of the Community Development Department. Over the past decade, the Community Development Department has dealt with the ebbs and flows of the economy, adjusted to a new form of government, and adapted to changes in County leadership. The Public Works Department is involved in permit processing with building permits and Type III permits. This evaluation included: organizational culture and roles alignment; process definition and documentation; organization; performance measurement and management; physical space; stormwater management; financial management; technology; and staff development and retention.

Fees/Charges and Cost Recovery Review for Community Development Department Activities – Citygate is currently completing a fees/charges and cost recovery review for the following Clark County Community Development Department programs: Building Safety, Permit Center, Development Engineering, Fire Marshal, Land Use Review, Wetland and Habitat Review, and Administration (includes business technology). The goal of this study is for Citygate to review the overall financial operation of Department programs and provide recommendations for revenue enhancement (fees and charges review) and/or cost reduction to help make the Department operation more self-supporting, achieving full cost-recovery if possible. Citygate is assessing the impact and resolution of fee latency (delayed or lost) for receiving revenues (primarily applicable to Wetland and Habitat Review and Land Use Review programs). Citygate is also providing support and involvement toward Council decision and approval through various meetings and work sessions with Council members and external stakeholders, if necessary.

Salt Lake City, UT – *Multiple Reviews—Conducted Since 1985*

Review of the City's Building Services Process – Citygate recently conducted a review of the City's Building Services Process. This in-depth analysis included surveys of both internal and external stakeholders, a comparison of current City practices to best practices, and a detailed Implementation Action Plan designed to make the processes more efficient and effective, in line with the City's desire to be a partner with, and advocate for, building permit applicants that are improving the City and growing the economy.

Performance Audit for the Planning Division – Citygate completed a two-phased study which involved conducting interviews regarding the effectiveness of Salt Lake City's planning program and processes, and based on issues identified in Phase I, performing a detailed analysis of the planning program in Phase II.

Both Citygate's study process and recommendations resulted in immediate improvements in the Planning Department. The study was so successful that Citygate's Project Manager was then hired to provide leadership in implementing the study recommendations over a two-year period. The extensive list of significant recommendations was implemented, almost without exception, within a four-month period.

Management and Performance Audit of the Redevelopment Agency – Citygate conducted a Management and Performance Audit of the Salt Lake City Redevelopment Agency. The principal purpose of the review was to assess the Agency's organization and management structure, staffing levels, workload, management control system, procurement, budgeting, human resource and asset management procedures, program effectiveness, record keeping, customer service/relations, plan, and goals.

Management Audit for the City's Engineering Division – Citygate conducted a Management Audit of the Salt Lake City Engineering Division including Public Services and Utility Departments.

County of Monterey, CA

Proposal to Perform a Review of the Resource Management Agency

The principal purpose of the review was to assess the Division's organization structure, staffing levels, workload, project scheduling, workload prioritization, project management, outsourcing/contracting services, cost allocation formulas, cost allocation methodology, record keeping, customer service/relations, and the internal and external coordination of work.

City Council and Planning Staff Professional Development Training – Citygate facilitated two 1-day workshops with the Salt Lake City Planning staff and Council staff focused on professional development, team building, and strengthening organizational culture.

Solano County, CA – Operational Review of the Development Permit Process

Citygate completed an independent review of the Department of Resource Management's development permit process. Citygate provided recommendations and analysis to help the department to organize its staff and limited resources into a work program and work process to meet increased demands for services related to the development permit process.

City of Grants Pass, OR – Operations Plan for the Community Development Programs including Public Works

Citygate recently performed an operations plan for Community Development Programs for the City of Grants Pass, OR with a scope of work nearly identical to Menlo Park's contemplated study. The study focused on the operations of the Grants Pass Community Development functions (Planning Services, Building Services, and Parks and Community Development Management divisions), an organizational structure review of the Public Works Department, and customer feedback, culminating in an Operations Plan for Community Development functions.

City of Healdsburg, CA – Assessment of the Community Development Center

Citygate performed an assessment of the Community Development Center's organizational structure, staff capacity, policies, processes, practices, and documentation. Citygate will identify findings and formulate recommendations to enhance the capacity of the CDC to deliver its complex array of services in a high-workload environment.

City of Albany, CA – Public Works Department Operational and Organizational Assessment

Citygate Associates conducted an Operational and Organizational Assessment of the Public Works Department for the City of Albany, CA. The assessment recommended operational efficiencies, organizational structures, and performance measures to ensure the Department functions at a high level of efficiency and effectiveness.

City of Modesto, CA – Management Audit of the Community Development Department, Interim Planning Director

Citygate conducted a comprehensive review of the Community Development Department of this Central Valley city. The Department consists of the Building and Development Services Division, Planning Division, and Business Development. The Planning Division was hit by a “perfect storm” of challenges including budget reductions, unstable leadership, red-hot housing market, shortage of planners, and organizational setting. As part of its review, Citygate conducted separate surveys of Building customers and Planning Department customers. Citygate focused on the dynamics of rapid growth that can cause the workload of a community development department to increase dramatically, thereby challenging the existing departmental resources, management systems, and service levels.

The City Council enthusiastically embraced the findings and recommendations in Citygate’s report. The City formed a dynamic Development Review Team. This resulted in increased interdepartmental cooperation and coordination. Duties were re-assigned so that planners could focus on planning rather than administrative tasks. The City fully implemented their electronic permit tracking system (Accela) in both the Building Division and Planning Division. Citygate also provided an Interim Planning Director for the City of Modesto and prepared an organizational assessment report.

City of Ogden, UT – Rotating Management Audits including Public Works and Community Development

Citygate has performed general management and operations studies for eight City of Ogden departments, including: Community Development, Public Works, Code Enforcement, Community Services, Redevelopment Agency, Police Department, Animal Services, and Fire. Each study analyzed the performance measurement, policies, procedures, management, and operations of the departments. We examined issues related to the philosophy and mission; organizational structure and management systems; organizational relationships; relationships with citizens; allocation of employees and other resources; personnel management and training; data management; records management, communications and information systems; facilities and equipment; management methodologies; maintenance functions; and fiscal management of each Department.

City of Carlsbad, CA – Performance Audit of the Development Services Review Process

Citygate conducted a Development Review Process Audit of the City of Carlsbad. The scope of the study included the program areas of Building, Planning, Development Services Engineering, and Fire Prevention, Environmental Quality, the Permit Counter, and Housing and Redevelopment, as well as the Department’s use of Accela.

City of Vista, CA – Performance Audit of the Development Review Process

Citygate was also asked to conduct a performance audit of the City of Vista’s Development Review Process. The scope of the study included the program areas of Building, Planning, Engineering, Inspection Services, Fire Prevention, and other functions that relate to the Development Review Process, as well as the Department’s use of Accela.

City of Ojai, CA – Independent Management Audit of the Community Development Department

Citygate performed an Independent Management Audit of the Community Development Department for the City of Ojai. The City had several objectives for this audit. First, Citygate assessed Department perceptions from internal and external stakeholders. Next, Citygate evaluated Department practices and performance against best practices, and evaluated the Department’s organizational structure, staffing, and workload. Finally, Citygate developed key findings and recommendations to improve Department processes and customer service.

Citygate has also performed the following studies related to land use and community development:

- ◆ City of Beaverton, OR – Business Process Audit and Re-Engineering, Development Services and Building Inspection Services
- ◆ Calaveras County, CA – Performance Review of Planning and Building Departments
- ◆ City of San Clemente, CA – Management Review of CDD
- ◆ City of Pittsburg, CA – Efficiency Review of Development Permitting Programs
- ◆ Lee County, FL – Technology Review of the CDD
- ◆ City of Dana Point, CA – Management Review of the Planning, Building, and Public Works Counter Operations, Strategic and Tactical Guidance for Technology Support
- ◆ City of West Linn, OR – Analysis of Building Revenues and Expenditures
- ◆ City of Atwater, CA – Interim Community Development Director and Org. Assessment
- ◆ City of Santa Rosa, CA – Comparative Research on the EDDs in Eight California Cities
- ◆ City of Reno, NV – Performance Audit of CDD
- ◆ Placer County, CA – Review of Major Development Agreement Orders
- ◆ City of Fresno, CA – Assistance to Fresno Redevelopment Agency to Provide Project Management Services
- ◆ City of Los Altos – Performance Audit of CDD
- ◆ City of Corona, CA – Performance Review of Planning, Building, Housing, and Development Departments
- ◆ City of Dana Point, CA – Management Review of Planning, Building, and Public Works Operation Counter
- ◆ County of Madera, CA – Fee Assessment Study for New Development.

3.2.2 Local Project Experience

Our local project expertise is extensive, having served Monterey County six times since 2013. These projects are listed below:

Monterey and Santa Cruz Counties, CA – Winter Storm Response Plan Update

Citygate performed an update to the 2010 Monterey County Winter Storm Response Plan and developed a similar Plan for Santa Cruz County consistent with the requirements of California Water Code Section 9650 and applicable California Department of Water Resources guidelines.

Monterey County, CA – Comprehensive Services Delivery and Staffing Review of the Sheriff's Department

Citygate performed a comprehensive services delivery and staffing review of the Monterey County Sheriff's Department. This study addressed all facets of field, command, and support operations, including, but not limited to: Enforcement Operations (patrol), Corrections Operations (jail), Administration, Investigations, Internal Affairs, professional standards, training, records, support services, civil services, coroner services, and other specialty services.

Monterey County, CA – EMS Agency Ambulance System Issues Review and Analysis of Options

Citygate conducted a review of issues in the ambulance transport system relating to the County's contracted provider and the local government stakeholders. Citygate used focused listening and documentation review to substantiate issues identified and work separately and jointly with system partners to forge improved relations and operational agreements.

Monterey County, CA – Healthcare Preparedness Partnership Training, Education, and Exercise Analysis

Citygate conducted a healthcare preparedness partnership training, education, and exercise analysis for Monterey County. Citygate audited current emergency plans and training schedules and conducted a gap analysis and closure to identify short- and long-term vulnerabilities that may prevent a rapid, definitive, and effective response to an emergency in Monterey County. The plan is scalable and modifiable, with recommendations for training sources.

Monterey County, CA – Update of the Monterey County EMS Communications Plan

Citygate reviewed the Monterey County Emergency Medical Services System Communications Plan to integrate the upcoming radio system improvements. In addition, Citygate advised the EMS agency and hospitals regarding best-fit equipment needed to update capabilities. Once completed, the project will also consider all regional policies and state-mandated Incident Command System regulations.

County of Monterey, CA

Proposal to Perform a Review of the Resource Management Agency

Monterey County, CA – Office of Emergency Services Tabletop Exercise for Elkhorn Slough

Citygate developed and facilitated a tabletop exercise to test the understanding of roles and responsibilities of first responders, government executives, jurisdictional authorities, and private industry in the event of a maritime hazardous materials spill into the Elkhorn Slough National Reserve. Additional objectives included strengthening core capabilities by examining the recovery and rehabilitation process on environmental impacts and testing operational coordination and response procedures for a maritime hazardous materials spill.

SECTION 4—COST

4.1 PROPOSED COSTS

Our charges are based on *actual time* spent by our consultants at their established billing rates, plus reimbursable expenses. We will undertake this study for a “not-to-exceed” total cost based on our *core* Work Plan and Scope of Work, outlined below:

| Consulting Fees of Project Team | Reimbursable Expenses | Administration (5% of Hourly Fees) | Total ³ |
|---------------------------------|-----------------------|------------------------------------|-------------------------|
| \$144,320 (766 hours) | \$13,066 | \$7,216 | <u>\$164,602</u> |

The County may find that our proposed Work Plan consists of tasks that are not desired. Citygate always wants to meet or exceed our client’s expectations. Therefore, if we have “missed the mark” on our pricing or scoping of this project, we will remain flexible to make reductions to tasks, levels of service, and the budget as needed to achieve the County’s desired outcomes.

Below, Citygate presents the costs for *optional* Work Plan items.

| Element of Cost | Cost Amount |
|---|------------------|
| Review Outsourcing and Insourcing Opportunities (Sub-Task 5.3) | \$7,896 |
| Review Housing and Economic Development Structural Alignment (Sub-Task 5.4) | \$8,600 |
| Brief County Board of Supervisors on Draft Results (Sub-Task 6.3) | \$6,296 |
| Final Report Presentation (Sub-Task 7.2) | \$3,879 |
| 6- or 12-Month Follow-up (Task 8) | \$8,424 |
| Options Sub-Total: | \$35,094 |
| Total Project Cost with All Options: | \$199,696 |

³ This total cost includes the following assumptions:

Employee and Customer Surveys (Sub-Tasks 2.3 and 3.2) – Our budget assumes that the surveys will be Internet-based and does not include postage, photocopying, or data entry, and would require the assistance of the County in emailing/ mailing/posting invitations and other survey-related materials that may be necessary to encourage survey participation. Our cost bid also assumes that the surveys will be created and launched in English only.

Three Focus Group Meetings (Sub-Task 3.1) – Our budget assumes the three focus group meetings occur over a two-day period and are facilitated by two consultants.

Two Stakeholder Presentations (Sub-Task 6.3) – Our budget assumes the two stakeholder meetings to discuss findings and recommendations both happen on the same day and are facilitated by two consultants.

County of Monterey, CA

Proposal to Perform a Review of the Resource Management Agency

The price quoted is effective for 90 days from the date of receipt of this proposal and includes one (1) draft review cycle to be completed by Citygate and the County within two weeks. Additional Draft Report cycles or processing delays requested by the County would be billed in addition to the contracted amount at our time and materials rates, and will result in automatic project deadline extensions. The Draft Report will be considered to be the Final Report if there are no suggested changes within thirty (30) days of the delivery of the Draft Report.

If the County decides to delay the final presentation in Task 7 after acceptance of the final work product, Citygate will accommodate such a request, but will charge two administrative hours per month to keep the project in suspense until the presentation is delivered.

4.1.1 Hourly Rates

| Classification | Rate | Consultant |
|--|----------------|-----------------|
| Citygate President | \$250 per hour | David DeRoos |
| Project Manager | \$195 per hour | Evert Palmer |
| Local Government Specialist / Lead Consultant | \$195 per hour | Jane Chambers |
| Parks and Recreation Specialist | \$195 per hour | Julee Conway |
| Planning and Building Specialist / Technical Advisor | \$225 per hour | John Hester |
| Local Government Specialist | \$195 per hour | Connie Jackson |
| Public Works Specialist / Technical Advisor | \$210 per hour | Nicholas Pinhey |
| Fiscal Specialist | \$195 per hour | Andrew Green |
| Local Client Coordinator | \$225 per hour | Samuel Mazza |
| Survey Administrator | \$125 per hour | Various |
| Report Project Administrator | \$125 per hour | Various |
| Administrative Support | \$95 per hour | Various |

4.1.2 Billing Schedule

We will bill monthly for time and reimbursable expenses incurred at actual costs (travel). Our invoices are payable within thirty (30) days. Citygate’s billing terms are net thirty (30) days plus two percent (2%) for day thirty-one (31) and two percent (2%) per month thereafter. Our practice is to send both our monthly status report and invoice electronically. Once we are selected for this project, we will request the email for the appropriate recipients of the electronic documents. Hard copies of these documents will be provided only upon request. We prefer to receive payment by direct deposit, if available.

County of Monterey, CA

Proposal to Perform a Review of the Resource Management Agency

We request that ten percent (10%) of the project cost be advanced at the execution of the contract, to be used to offset our start-up costs. This advance would be credited to our last invoice.

APPENDIX A

CODE OF ETHICS

CODE OF ETHICS

CLIENTS

1. We will serve our clients with integrity, competence, and objectivity.
2. We will keep client information and records of client engagements confidential and will use proprietary client information only with the client's permission.
3. We will not take advantage of confidential client information for ourselves or our firms.
4. We will not allow conflicts of interest which provide a competitive advantage to one client through our use of confidential information from another client who is a direct competitor without that competitor's permission.

ENGAGEMENTS

5. We will accept only engagements for which we are qualified by our experience and competence.
6. We will assign staff to client engagements in accord with their experience, knowledge, and expertise.
7. We will immediately acknowledge any influences on our objectivity to our clients and will offer to withdraw from a consulting engagement when our objectivity or integrity may be impaired.

FEES

8. We will agree independently and in advance on the basis for our fees and expenses and will charge fees and expenses that are reasonable, legitimate, and commensurate with the services we deliver and the responsibility we accept.
9. We will disclose to our clients in advance any fees or commissions that we will receive for equipment, supplies or services we recommend to our clients.

PROFESSION

10. We will respect the intellectual property rights of our clients, other consulting firms, and sole practitioners and will not use proprietary information or methodologies without permission.
11. We will not advertise our services in a deceptive manner and will not misrepresent the consulting profession, consulting firms, or sole practitioners.
12. We will report violations of this Code of Ethics.

The Council of Consulting Organizations, Inc. Board of Directors approved this Code of Ethics on January 8, 1991. The Institute of Management Consultants (IMC) is a division of the Council of Consulting Organizations, Inc.

APPENDIX B

PROJECT TEAM RESUMES

Mr. DeRoos is the President of Citygate Associates, LLC and former Deputy Director of the California Redevelopment Association. He earned his undergraduate degree in political science / public service (Phi Beta Kappa) from the University of California, Davis, and he holds a master's degree in public administration from the University of Southern California. Mr. DeRoos has over five years of operational experience as a local government administrator in land use planning, budgeting, and personnel and 30 years of consulting experience performing operations and management reviews of local government functions. Prior to joining Citygate in 1991, he was a Senior Manager in the State and Local government consulting division of Ernst & Young in its Los Angeles Office. Mr. DeRoos has led over 500 consulting engagements, including every land use study Citygate has performed.

Relevant Experience Includes:

- ◆ For all Citygate projects, Mr. DeRoos reviews work products and is responsible for ensuring that each project is conducted smoothly and efficiently within the schedule and budget allocated and that the project deliverables are in conformance to Citygate's quality standards.
- ◆ Served in an oversight capacity for an organizational analysis and strategic plan for the Community and Economic Development Department for the City of Salinas, CA.
- ◆ Served in an oversight capacity to perform an organizational and operational review of Goleta's Planning and Environmental Review Department, with the strategic objective of enhancing organizational operations for current and future needs.
- ◆ Served in an oversight capacity for an organizational assessment of the City of San Luis Obispo Community Development Department.
- ◆ Served in an oversight capacity for Citygate's organizational and functional analysis of the Department of Planning and Land Use and associated land development services for San Diego County.
- ◆ Served in an oversight capacity for Citygate's performance audit of the Planning and Environmental Review and Assessment Departments for the County of Sacramento, CA.
- ◆ Served in an oversight capacity as Project Director for a performance audit of the Community Development Department for Clark County, Washington. The study included the divisions of Planning, Customer Service, Development Services, Building, Engineering, Code Enforcement, and Fire.
- ◆ Served in an oversight capacity to perform an evaluation of Permit Center operations for Clark County, Washington, reviewing service levels and standards, performance measures, performance reporting, and the employee performance management system for alignment with stakeholder and customer expectations. Citygate previously performed a very similar a project to analyze the Permit Center operations and service delivery.

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- ◆ Served in an oversight capacity to conduct a fees/charges and cost recovery review for Community Development Department activities for Clark County, Washington.
 - ◆ Served in an oversight capacity to perform a review of Building Services processes for Salt Lake City, UT.
 - ◆ Served as Project Director for a two-phased study in which Citygate conducted extensive interviews regarding the effectiveness of Salt Lake City's planning program and processes, and based on issues identified in Phase I, performed a detailed analysis of the planning program in Phase II.
 - ◆ Served in an oversight capacity for a Winter Storm Response Plan update for Monterey County and Response Plan development for Santa Cruz County.
 - ◆ Served in an oversight capacity for an ambulance system issues review and analysis of options for the County of Monterey EMS Agency. Citygate used focused listening and documentation review as necessary to substantiate issues identified and then worked separately and jointly with system partners to forge improved relations and operational agreements.
 - ◆ Served in an oversight capacity for healthcare preparedness partnership training, education, and exercise analysis for Monterey County. Citygate conducted an audit of current emergency plans and training schedules and conducted a gap analysis and closure to identify short- and long-term vulnerabilities that may prevent a rapid, definitive, and effective response to an emergency in Monterey County. The plan is scalable and modifiable, with recommendations for training sources.
 - ◆ Served in an oversight capacity for the County of Monterey EMS Agency to update the Monterey County EMS Communications Plan.
 - ◆ Served in an oversight capacity for a tabletop exercise for the Monterey County Office of Emergency Services.
 - ◆ Served in an oversight capacity to perform a comprehensive services delivery and staffing review of the Monterey County Sheriff's Department.
 - ◆ Served in an oversight capacity as Project Director for a project that assessed critical land development processes, including environmental review, improvement plan check, building plan check, and final map approval plan check for Placer County's Land Development Departments.
 - ◆ Served in an oversight capacity for an independent review of the Department of Resource Management's development permit process for Solano County.
 - ◆ Recently served in an oversight capacity to perform an operations plan for community development programs for the City of Grants Pass, Oregon. The study focused on the operations of the Grants Pass Community Development functions (Planning Services, Building Services, and Parks and Community Development Management divisions), an organizational structure review of the Public Works Department, and customer feedback, culminating in an Operations Plan for Community Development functions.

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- ◆ Served in an oversight capacity as Project Director for Citygate’s performance review of the Community Development Department for the City of Los Altos, California.
 - ◆ Served in an oversight capacity to perform an assessment of the Community Development Center and review the Building functions for the City of Healdsburg.
 - ◆ Served as Project Director for the assessment of the City of Albany Public Works Department.
 - ◆ Served in an oversight capacity for Citygate’s operational review of the Public Works Department for the Town of Windsor, California. The project included an assessment of the Operations and Maintenance Division, including Utilities and Streets; and the Engineering Division, including Development Engineering, Utility Engineering, and Transportation Engineering.
 - ◆ Served as Project Director for Citygate’s Development Review Process audit of the City of Carlsbad. The scope of the study included the program areas of Planning, Environmental Quality, Building, Housing and Redevelopment, Development Services Engineering, Code Enforcement, and Fire Prevention. Part of this study included an in-depth analysis of Carlsbad’s Development Services Counter.
 - ◆ Served as Project Director for Citygate’s performance audit of the City of Vista’s Development Review Process, including the program areas of Building, Planning, Engineering, Inspection Services, and other municipal functions that relate to the Development Review Process.
 - ◆ Served as Project Director for Citygate’s performance audit of the Community Development Department of the City of Reno, NV. The scope of the study included the program areas of Planning, Engineering, Building Inspections, Code Enforcement, and Property Management.
 - ◆ Performed eight General Management and Operations Studies for the City of Ogden’s Public Works, Community Development, Redevelopment Agency, Community Services, Police, Animal Control, Fire, and Code Enforcement as Project Director. The studies included numerous tasks such as analyzing existing programs and service levels in terms of performance measures, evaluating the current operations, assessing the adequacy of organizational structure and management staffing levels, identifying and documenting the attitudes of employees, and identifying modifications.
 - ◆ Served as the Project Director for a citywide management audit for the City of Glendora, California. The following departments were included in the study: Public Works; Planning; Community Services; Administration; City Clerk; Finance; Public Library; and Police. The study culminated with recommended ways in which the City structure can better serve the community and be more “user friendly.” The study further determined the extent to which the members of the City employee structure take advantage of appropriate training, equipment, and technology, and whether there might be more efficient implementation of

technological advances. The study also recommended cost savings and restructuring to permit funding of capital requirements.

- ◆ Served as the Project Director for a citywide management audit for the City of Pinole, California. The project was conducted at the initiative of the City Council, and emphasized the establishment of performance measures for each Department and division of the City, including Public Works, Community Development, Planning, Building, Redevelopment, Administration, Finance, Personnel, Police, Fire, and Sewer Treatment. Citygate also formulated recommendations to improve the efficiency and effectiveness of the City. Included in the project was the evaluation of the City's financial stability, and measures to improve the health and vigor of the City's finances. As part of this analysis, Citygate also reviewed the adequacy of the City's cost recovery methodology.
- ◆ Served as the Project Director for a citywide management assessment of the non-safety departments of the City of Covina, California. The municipal departments included in this assessment were: Development Services; Parks and Recreation; the City Manager's office; Public Works; Finance; the City Clerk office; Personnel and Risk Management; Redevelopment and Housing; and the City Library.
- ◆ Performed eight General Management and Operations Studies for the City of Corona's Public Works Department, Planning and Building Departments, Utility Services Department, Public Library, Housing and Development Department, Police Department, Fire Department and the Management Services Department. These studies examined such crucial factors as performance measures, organizational structure, human resource management and allocation, department policies and procedures, strategy and planning, leadership, operations, resource allocation, training, and management information systems.

Mr. DeRoos is a member of several professional and civic associations. He has taught for the UC Davis Extension College and for graduate classes in public administration, administrative theory, and labor relations for Golden Gate University and non-profit and association management for the University of Southern California. He speaks and trains frequently on the topic of Leadership, Character, and Values and has also been a speaker for the American Planning Association (APA), written for the California APA newsletter and the California Redevelopment Journal, and has been a speaker on redevelopment, base closures, and related issues across the US. Mr. DeRoos holds a certificate in public sector labor management relations from UC Davis and is a Certified Management Consultant (CMC).

Mr. Palmer is a Senior Associate with Citygate Associates. Mr. Palmer served the City of Folsom for 23 years as Assistant Finance Director/Information Technology, Director of Administrative Services, Assistant City Manager, and City Manager, retiring in 2018 after 7 years as the City's chief executive. Mr. Palmer served Folsom during a time of significant growth, contributing to and completing two annexations that increased the City's size by more than 3,500 acres and 11,000 housing units. Using alternative service delivery, contracting, efficiency measures, and public/private partnerships, Mr. Palmer successfully led Folsom, a full-service city, through the Great Recession, guiding the City Council and the community through a strategic restructuring of City operations that not only retained the City's high-quality services and infrastructure, but also improved balance sheets in the general, internal service, retiree health, solid waste, waste water, and water funds. During this same period, Mr. Palmer aided several community organizations through their own restructuring, increasing their self-reliance and reducing their requirements for public funding. Mr. Palmer's work in economic development, in collaboration with the Folsom Chamber of Commerce, led to the location and expansion of several high-technology employers to Folsom, for which he was awarded the Folsom Chamber of Commerce's Chairman's Award in 2014.

Mr. Palmer is an International City/County Management Association Retired Credentialed Manager, having earned and held this designation since 2011. Mr. Palmer earned a Master of Public Administration degree from Golden Gate University, a Bachelor of Arts in Organizational Leadership degree from Chapman University, and a Certificate of Achievement in Municipal Leadership from the University of Southern California School of Policy, Planning and Development. Before his service to the citizens of Folsom, Mr. Palmer served as an information technology professional in both the public and private sector, and worked on a number of large-scale IT implementations in the banking, corporate, general government, and public safety sectors.

Related Experience Includes:

- ◆ Currently serving as Project Manager for a staffing analysis and optimization plan for the City of West Hollywood, California.
- ◆ Provided guidance to the City of Angels Camp on increasing the effectiveness of public-private partnerships while reducing the local agency funding burden for local non-profit operations as part of Citygate's organizational review and budget stabilization assessment.
- ◆ Assisted the City of Goleta in evaluating its information technology strategy and operations as part of Citygate's organizational and operational review of the City Manager and Neighborhood Services and Public Safety Departments.
- ◆ As Assistant City Manager, Mr. Palmer played a key role in the City of Folsom's 2008 strategic planning process that set the ambitious goal of making significant investments in the community and becoming recognized as one of the most desirable communities to build one's future. In 2018, the accolades for Folsom continued, including Wallet Hub's "Best Place to Raise a Family in California" and Smart Asset's "2nd Best West Coast City to Raise a Family."

- ◆ As Folsom’s City Manager, led the City through the Great Recession and retained the City’s high-quality services and infrastructure by investing tens of millions of dollars in infrastructure improvements, and also improved the General Fund undesignated reserve fund from \$3,993,214 to 16,552,680.
- ◆ Developed significant investments in personnel, equipment, and facilities, including construction of a fifth fire station, resulting the Insurance Service Office (ISO) upgrading the City of Folsom Fire Department’s ISO Rating from 3/3X to 2/2X, among the upper three percent of the 46,000 fire departments in the nation rated by ISO.
- ◆ Made investments in the City of Folsom’s Community Development Department operations, resulting the Insurance Service Office (ISO) upgrading the City’s Build Safety ISO rating from 3 to 2.
- ◆ Assisted several community organizations through their own restructuring, increasing their self-reliance and reducing their requirements for public funding.
- ◆ Negotiated development agreements for various projects that balanced private property interests and community desires.
- ◆ In collaboration with the Folsom Chamber of Commerce, led to the location and expansion of several high-technology employers to Folsom, for which he was awarded the Folsom Chamber of Commerce’s Chairman’s Award in 2014.
- ◆ Served as project manager for the City of Folsom’s Historic District revitalization and Historic Folsom Station Plaza projects totaling nearly \$20M.
- ◆ Served as project manager for the City of Folsom’s Public Library modernization plan, including construction of the City’s new Georgia Murray Library building and the joint-use Norm Siefkin Public Library facility on the Vista del Lago High School campus totaling more the \$15M.

Career Experience Includes:

Adjunct Professor, Golden Gate University, San Francisco, CA October 2010–Present

- ◆ Design and teach graduate level public administration courses in creating high-performing organizations through strategic planning, performance management, human resources management, and alternative service delivery methodologies.

City Manager, City of Folsom October 2011–July 2018

- ◆ Led a full-service, charter city with over 78,000 residents, 466 employees, and \$206 million all-funds budget that provides a full range of services, including fire, police, garbage collection, parks/recreation, public library, and water treatment. During Mr. Palmer’s tenure as City Manager, Folsom was rated as the #1 Place to Raise a Family by WalletHub. Mr. Palmer was appointed to the California Law Enforcement Telecommunications System Advisory Committee by the California Attorney General.

Assistant City Manager, City of Folsom June 2006–October 2011

- ◆ Assisted the City Manager in a general leadership role, and served as chief operating officer. Played a key role in analyzing service delivery models,

developing budgets, resolving employee grievances, negotiating labor agreements, negotiating development and tax-sharing agreements, representing Folsom on regional issues, and resolving community conflicts.

Director of Administrative Services, City of Folsom

July 2002–June 2006

- ◆ Managed staff of 30, an operating budget of \$6 million, and a capital improvement budget of \$15.5 million in delivering animal control, central purchasing and reception, facility management and maintenance, information technology, public library, and public relations services. Developed the City's first facility maintenance master plan. Served as project manager for development and construction of Folsom's two new library facilities. Served as EOC Manager.

Assistant Director of Finance/IT Manager, City of Folsom

February 1996–June 2002

- ◆ Created the City of Folsom's first information technology organization and developed computer technology, geographic information, and telecommunications master plans. Managed and completed large-scale technology upgrades in financial, equipment maintenance, facility maintenance, human resources, payroll, police dispatch, police records, road maintenance, and telephone systems.

Education and Certifications:

- ◆ Master of Public Administration, with Highest Honors, Golden Gate University, San Francisco, CA
- ◆ Bachelor of Arts in Organizational Leadership, Magna Cum Laude, Chapman University, Orange, CA
- ◆ Certificate of Achievement in Municipal Leadership, University of Southern California School of Public Policy and Planning, Sacramento, CA

Affiliations:

- ◆ Retired Member, International City/County Managers Association
- ◆ Member, Folsom Chamber of Commerce

Ms. Chambers is a Senior Associate with Citygate Associates. Ms. Chamber's 25 years in local government includes executive leadership as a City Manager, Assistant City Manager, Public Works Director, and Human Resources Director in full-service urban and suburban communities (Burbank, CA; Daly City, CA; San Bruno, CA; and Burnsville, MN). Her current and recent Citygate projects include community development reviews for Goleta, CA, Healdsburg, CA, and Salt Lake City, UT; a line department operational and financial review for Contra Costa County and San Mateo County; and citywide reviews for West Hollywood and Angels Camp, CA.

Ms. Chambers began her local government career with the City of Burbank, where she worked directly with Public Works Engineers, the finance team, and streets, fleet, and corporation yard personnel. In addition, she served a two-year term as Interim Public Works Director for the City of San Bruno, where she was responsible for ensuring that previously delayed capital improvement projects totaling \$22 million were completed on time and on budget. These projects included a variety of streets, sidewalks, water, wastewater, and facilities.

Ms. Chambers served as Ukiah, CA City Manager for seven years, retiring in June 2015, and then served as Interim Assistant City Manager for the City of Sunnyvale, CA, and has recently again provided interim support to the City Manager's office in Sunnyvale during its permanent Assistant City Manager search process. Throughout her career, Ms. Chambers successfully implemented strategic realignment of service delivery systems, including financial resources, to achieve improved and sustainable programs for citizens.

Ms. Chambers has expertise assisting elected officials, city staff, and community stakeholders identify and achieve desired goals in complex financial and operational environments, as well as operational and service delivery experience in economic and community development, public works, parks and recreation, housing, human resources, water, sewer, and solid waste. Ms. Chambers is an ICMA Retired Credentialed Manager, having earned and maintained this recognition annually for more than a decade, and earned a Master of Public Administration Degree from UCLA, and an undergraduate degree in Political Science from California State University, Northridge.

Related Experience Includes:

- ◆ Served as Project Manager and Lead Consultant to perform an organizational and operational review of Goleta's Planning and Environmental Review Department, with the strategic objective of enhancing organizational operations for current and future needs.
- ◆ Served as Project Manager and Lead Consultant for organizational and operational review of Goleta's City Manager and Neighborhood Services and Public Safety Departments for the City of Goleta, California.
- ◆ Served as Stakeholder Outreach Consultant to perform a review of the Salt Lake City's building services process.
- ◆ Served as Project Manager for an assessment of the Community Development Center and review the building functions for the City of Healdsburg.
- ◆ Currently serving as Local Government Specialist for a staffing analysis and optimization plan for the City of West Hollywood, California.

- ◆ Currently serving as Local Government Management Specialist for a service level assessment of the Orange County Fire Authority's Executive Leadership Team and Human Resources functions to ascertain the efficiency and effectiveness of leadership and personnel operations and ensure compliance with policies/procedures, best practices, and regulatory agencies. This was one of five as-needed organizational service level assessments of operations for Orange County Fire Authority as part of a Master Services Agreement.
- ◆ Currently serving as Project Manager and Local Client Coordinator to evaluate the performance of the Peninsula Humane Society and Society for the Prevention of Cruelty to Animals in San Mateo County, California, to examine contractual compliance, as well as whether the necessary animal shelter operational elements exist to increase performance and transparency.
- ◆ Served as Local Coordinator to provide technical consulting support for the County's efforts to prepare a Request for Proposals (RFP) for the upcoming contract period for a vendor(s) to provide animal services for San Mateo County, California, and its member cities.
- ◆ Served as Project Manager and Lead Consultant for an organizational review and budget stabilization assessment for the City of Angels Camp, California, with the purpose of developing a strategic, goal-focused, sustainable budget strategy.
- ◆ Served as Senior Associate and Fiscal Specialist for an emergency services Master Plan for the Aptos/La Selva Fire Protection District.
- ◆ Served as Project Manager to perform a high-level field operations and sheltering practices cost analysis for the Contra Costa County Animal Services Department.
- ◆ Served as Human Resources Specialist to conduct a fire services reorganization study for the City of Greenfield and the Greenfield Fire Protection District.
- ◆ Served as Project Manager and Lead Consultant for an organizational review of the Planning Department for the Midpeninsula Regional Open Space District in the Bay Area.
- ◆ Served as Senior Associate and Fiscal Specialist to perform a review of the City of Victorville's fire services options.
- ◆ Interacted with West Hollywood staff on California legislative initiatives led by the City, and on the League of California Cities Revenue and Taxation committee before her retirement in 2015.
- ◆ Beginning in 2008, as City Manager of Ukiah, successfully addressed subsequent years of multi-million-dollar general fund deficits, including additional \$1 million loss of redevelopment funds, to achieve a balanced \$15 million General Fund in 2014–15.
- ◆ Implemented annual five-year revenue forecasting and improved fiscal report transparency in budget document as City Manager in Ukiah.
- ◆ Led business process reengineering efforts throughout her career, improving performance in information systems, finance, building and planning, and human resources, as well as administrative services delivery for both internal and

external customers. Examples include resolving operations issues such as fleet management and police staffing for public events in Daly City, California and reducing costs and increasing profit margins for two City-operated enterprises: a \$3.3 million liquor enterprise and a \$3.8 million events center in Brooklyn Center, Minnesota.

- ◆ Facilitated efforts toward an eventual fire agency merger, improving advanced life support services regionally and their cost-effectiveness in \$3 million combination of service delivery between City of Ukiah and the Ukiah Valley Fire District.
- ◆ Secured opportunity for over 100 new jobs and \$1 million new sales tax revenues as part of economic development activities as City Manager in Ukiah.
- ◆ Secured opportunity for the State Administrative Office of Courts to build a new \$123 million Mendocino County Courthouse and assembled the site through public/private collaboration with multiple agencies, including the County, the State Water Board, the Administrative Office of the Courts, and a local developer.
- ◆ Instituted proactive business liaison efforts to facilitate expansion of local industries, such as local food movement, tourism, retail sales, and manufacturing. Occupancy tax revenues rose more than 10 percent in subsequent years.
- ◆ Corrected course and department service delivery systems in the Cities of San Bruno and Ukiah, resulting in completion of engineering, bidding, and construction activities in excess of \$38 million, including long-awaited infrastructure and street improvement projects.
- ◆ Oversaw completion of a \$56 million wastewater treatment plant in Ukiah and a \$7.9 million fire, jail, and police facilities program for the City of Brooklyn Center.
- ◆ Initiated and guided development of capital improvement budgets ranging from \$50 to \$100 million to address long-deferred infrastructure projects in electric, water, and sewer utilities, including equipment purchases for public safety, as well as planning for repairs and replacement of City parks and facilities in the Cities of Ukiah and San Bruno.

Ms. Conway has over 25 years of municipal and county government experience in Oregon and Nevada. Her career focus has been the professional management of service-oriented municipal and county parks, as well as recreation and community service departments. Her application of strategic thinking and outcome-based results has been the hallmark of her leadership. Drawing on her prior career experience in commercial banking and her post-graduate business degree, she has applied knowledge of how to successfully utilize sound fiscal management practices in the government setting.

These practical skills proved invaluable during the 2008–2011 recession as she, serving as Director, resourcefully guided the City of Reno Parks, Recreation and Community Services Department, which resulted in a more sustainable service model. In addition, her nationwide involvement and awareness of fitness and wellness trends in the parks and recreation industry led to the City of Reno receiving regional and national recognition for its programs, services, and creative funding initiatives.

Having worked for the Cities of Corvallis and Gresham in Oregon and Washoe County and the City of Reno in Nevada, Ms. Conway has extensive exposure and insight related to all facets of community engagement and consensus building associated with creating, developing, managing, and promoting sustainable and nimble parks, recreation, and community services agencies.

Building on her lifetime work as a successful administrator and leader in the field of parks, recreation, and leisure services, she now actively serves on the Advisory Board of the Truckee Meadows Parks Foundation. Ms. Conway earned a master's degree in business administration and a bachelor's degree in park administration. She is a member of the National Parks and Recreation Association and holds national certification as a Certified Park and Recreation Professional-#35101.

Citygate Project Experience Includes:

- ◆ Currently serving as Parks and Recreation Specialist for a staffing analysis and optimization plan for the City of West Hollywood, California.
- ◆ Served as Parks and Recreation Specialist for organizational and operational review of Goleta's City Manager and Neighborhood Services and Public Safety Departments for the City of Goleta, California.
- ◆ Served as Parks and Recreation Specialist to perform an operations plan for community development programs for the City of Grants Pass, Oregon.
- ◆ Served as Parks and Recreation Specialist for an organizational review of the Planning Department for the Midpeninsula Regional Open Space District in the Bay Area.

Other Related Experience Includes:

**Director, Parks, Recreation & Community Services Department (Retired),
City of Reno, Nevada**

2008–2015

- ◆ Responsible to manage, supervise, and administer a full-service, customer-oriented municipal leisure service department that provides a diverse and broad range of parks, recreation, and community services to the agency's constituents. Includes aquatic and community recreation facilities, golf course, ski area,

whitewater park, nature center, arts and culture programs, senior center, special events, 85 parks, and extensive open space and trails system.

- Managed up to a \$20 million operating budget, a \$15 million capital improvement program, and the associated full-time and part-time staffing levels of up to 300 people.
- Oversaw the development of eight park improvements, the initiation and completion of the golf course redevelopment plan known as Sierra Vista Park Master Plan, and the development and implementation of the Department's Park Maintenance Division's first Citywide Water Conservation Plan.
- Initiated and completed the Department's first Core Services Implementation Plan: a strategy to create and utilize realistic performance metrics to monitor and improve core operational functions.
- Developed and updated Department services' pricing models and fee procedures to meet organizational financial and service objectives.
- Initiated, monitored, and enhanced over 40 partnership and contractual agreements with area non-governmental organizations and businesses to advance the agency's core mission.
- Initiated system evaluation and began implementation of the automation of recreation program and activity registrations using ACTIVE software.
- Established an internal system to routinely review and modify financial and budgetary processes, achieving additional operational efficiencies while meeting security and fiscal compliance guidelines.

Director, Parks & Recreation Department, City of Corvallis, Oregon

2000–2008

- ◆ Responsible to manage, supervise, and administer a customer-oriented municipal parks and recreation department for a core population of approximately 55,000 people, providing a diverse and broad range of parks, recreation, and community services.
 - Managed 48 full-time and over 200 part-time employees with an operating budget of approximately \$5.3 million and a \$10 million capital improvement program budget.
 - Implemented a progressive open space property acquisition program with proceeds from a \$7.9 million citizen-approved bond measure.
 - Managed multiple community facilities, including Chintimini Senior Center, Corvallis Art Center, Osborn Aquatic Center, Riverfront Park, and Crystal Lake Sports Field Complex.
 - Initiated and completed the Park & Recreation Master Plan document.
 - Enlarged the park system to approximately 2,000 acres of open space and trails and enhanced the urban forestry program.
 - Administered robust all-age recreation services, a youth employment program, and special events.

Director, Parks & Recreation Division, City of Gresham, Oregon**1989–2000**

- ◆ Responsible for the creation and administration of a new parks, recreation, open space, trails, and park maintenance service organization for the fourth largest city in Oregon.
 - Supported the citizen passage of a \$10.285 million bond measure for acquisition of open space and natural areas.
 - Directed the successful implementation of the acquisition of nearly 500 acres of open space with bond proceeds.
 - Oversaw and directed the development of the agency’s first Park and Open Space Master Plan, guiding the further creation of services, park improvements, and open space enhancements.
 - Developed the first 4.5-mile segment of the nationally recognized Springwater Trail Corridor, a rails-to-trails conversion project.
 - Managed \$3.5 million operating budget and up to \$15 million capital improvement budget.
 - Responsible for management of the City’s 400,000 square footage of municipal building facilities.
 - Developed partnership management agreement with the Police Activities League non-governmental organization to provide youth services at City-owned recreation centers.

**Account Associate, Commercial Lending Division,
Union Bank, Fresno, California****1987–1989**

- ◆ Directly responsible for a \$4.5 million commercial loan portfolio and responsible for meeting aggressive marketing goals to support the organization’s mission; ongoing management of existing customer relationship accounts within a team environment; and preparing and presenting detailed financial analysis of selected clients to support credit service decisions.

Park Planner III, Washoe County, Nevada**1981–1985**

- ◆ Responsible for contract administration and execution of complex park acquisition and development projects. Implemented all phases of park planning, recreation programming, and administrative planning support for the Department Director and Senior Planning Manager. Supported the planning and development of the recreation and open space plan, Rancho San Rafael Regional Park, and Truckee River Master Plan.
 - Responsible to provide in-house marketing and Department-wide promotional program material preparation. Directed public relation programs related to park development, grand openings, and special events for the Department. Acted as Department liaison to community organizations, citizen advisory boards, and other governmental organizations related to park acquisition, development, and improvements.

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- Researched, prepared, administered, and monitored Bureau of Land Management land lease applications, land use planning, state water right appropriation submittals, and grant applications.
 - Coordinated and provided skilled advice to regional park ranger staff on completion of in-house renovation projects.

Education and Certification:

- ◆ Bachelor of Science in Park Administration
California State Polytechnic University, Pomona, California
- ◆ Master of Business Administration
California State University, Fresno, California
- ◆ Certified Park and Recreation Professional #35101
National Recreation and Parks Association

Select Professional Awards:

- ◆ 2015 Nevada Recreation and Park Society: Honorary Membership Award
- ◆ 2008 National Recreation and Parks Association Pacific Northwest Regional Council: Professional Award
- ◆ 1996 Oregon Recreation and Park Association: Special Citation Award
- ◆ 1995 Oregon Recreation and Park Association: Leadership Award
- ◆ 1995 Oregon Youth Sports Coaches Association: Outstanding Service Award
- ◆ 1994 Oregon Recreation and Park Association: New Professional of the Year
- ◆ 1987 Fresno State University Graduate Department: Graduate Dean's Medalist
- ◆ 1979 California State Polytechnic University, Pomona: Outstanding Park Administration Graduate

John Hester has over 30 years of experience in planning and community development functions within local government, many as an executive. Mr. Hester was the Community Development Director and Redevelopment Agency Administrator for the City of Reno, Nevada. He later served as Assistant City Manager. During his tenure at Reno, he significantly streamlined processes in the Building, Planning, Engineering, and Code Enforcement Divisions. Prior to joining the City of Reno staff in 1998, Mr. Hester served Washoe County, Nevada for over 17 years in various capacities including Community Development Director, Acting Water Resources Director, and Director of Comprehensive Planning. During his tenure with Washoe County, Mr. Hester was responsible for creation of the first Regional Open Space Plan for the County, as well as drafting and successful approval of State of Nevada open space funding legislation which has now been utilized in additional Nevada counties. He was a founding member of the Nevada Land Trust Board of Trustees and still serves as an Advisory Board member.

Mr. Hester is currently the Chief Operating Officer for the bi-state Tahoe Regional Planning Agency (TRPA). John has a strong track record of process improvement and delivering customer-centric outcomes. At the TRPA, he removed an application review backlog of 150 applications and updated the 25-year-old Lake Tahoe Regional Plan (which won APA awards).

He was named “Planner of the Year” by the Nevada Chapter of the American Planning Association in 1995 and “Public Administrator of the Year” by the Sierra Nevada Chapter of the American Society for Public Administration in 1995. He has presented at various national conferences and been a guest speaker and lecturer at a number of universities, and he and his staff have received numerous awards, including an American Planning Association National Planning Award in 1990. He has served as a member of the Nevada Small Business Development Center State Advisory Board, the State Land Use Planning Advisory Council, State Advisory Board on Water Resource Planning and Development, and as an officer for the Nevada Chapter of the American Planning Association.

Mr. Hester has a master’s degree in city and regional planning and a bachelor of science degree in architecture from the University of Texas at Arlington. He is a member of the American Institute of Certified Planners.

Relevant Consulting Experience:

- ◆ Served as Technical Resource to perform an organizational and operational review of the City of Goleta’s Planning and Environmental Review Department, with the strategic objective of enhancing organizational operations for current and future needs.
- ◆ Served as Project Director to perform an evaluation of Permit Center operations in Clark County, Washington, reviewing service levels and standards, performance measures, performance reporting, and the employee performance management system for alignment with stakeholder and customer expectations.
- ◆ Serving as Community Development Specialist to conduct a fees/charges and cost recovery review for Community Development Department activities for Clark County, Washington.

- ◆ Served as Project Manager to perform an operations plan for community development programs for the City of Grants Pass, Oregon.
- ◆ Served as Senior Associate for an assessment of the Community Development Center and review the building functions for the City of Healdsburg, California.
- ◆ Served as Planning and Community Development Specialist for an organizational review of the Planning Department for the Midpeninsula Regional Open Space District in the Bay Area.
- ◆ Served as Project Manager for an independent management audit of the Community Development Department for the City of Ojai, California.
- ◆ Served as Project Manager to perform a review of Salt Lake City's building services process.

Related Experience:

2011–Present

Tahoe Regional Planning Agency

July 2011–Present (Series of Annual Contracts)

Chief Operating Officer

- ◆ At the Agency level, responsible for establishing an annual Governing Board priority-setting workshop and department-level annual performance measures that link directly to individual employee performance appraisals. At the Planning Department level, responsible for creating a Planning Department that combined Long Range Planning, Transportation Planning (including Metropolitan Planning Organization function), Current Planning, and Code Enforcement. Planning Department accomplishments include updating a 25-year-old Regional Plan, Code, and Water Quality Management Plan (Long Range Planning Division); maintaining the Metropolitan Planning Organization designation, updating the Regional Transportation Plan, creating one of the first Sustainable Communities Strategies to be certified by the State of California, and obtaining approximately \$900,000 and managing approximately \$2 million in California Strategic Growth Council grants (Transportation Planning Division); and eliminating a backlog of 145 cases that were beyond the 120 day Bi-State Compact designated period for review (Current Planning Division).

1998–2011

City of Reno, Nevada

September 2010–June 2011

Assistant City Manager/Redevelopment Administrator

- ◆ Responsible for the business license program that issues over 20,000 licenses to businesses, with gross receipts of \$35 billion per year; legislative relations; and acting as City Manager when necessary.

August 2009–August 2010

Community Development Director/Redevelopment Administrator

- ◆ Responsible for a Redevelopment Agency that had a budget exceeding \$10 million annually, a staff of six, two property tax increment districts, two sales tax increment districts, a parking garage, and a public market.

2003–2009 *Community Development Director*

1998–2002 *Community Development Manager*

- ◆ Responsible for planning, engineering, building and safety, and code enforcement functions in a City serving approximately 225,000 residents. At peak levels, these functions represented an annual budget exceeding \$14 million, staff of more than 140 full-time equivalents, a planning caseload of over 50 cases per month, annual review and acceptance of over \$100 million in new infrastructure, processing of over 12,000 building permits with valuation of more than \$1.1 billion per year, and management of 4,000 code enforcement cases per year.

1981–1998 **Washoe County, Nevada**

1996–1998 *Community Development Director*

- ◆ Responsible for planning, building and safety, code enforcement, and business license functions for the County, with an unincorporated area population of approximately 100,000.

1996–1997 *Acting Director of Water Resources*

- ◆ While serving as Community Development Director, also responsible for regional water planning, including new legislation (NRS 540A), preparation of first Regional Water Management Plan, and presentation of the Plan to the Nevada Legislature, as well as provision of water and wastewater utility services to approximately 12,000 customers. One of two negotiators representing the Cities of Reno and Sparks and the County of Washoe at Truckee Carson Settlement Negotiations sponsored by U.S. Senator Reid. Appointed by Governor to represent Washoe County on State Advisory Board on Water Resources Planning and Development.

1990–1996 *Director of Comprehensive Planning*

- ◆ Responsible for full range of Countywide and unincorporated planning functions, including information systems (Countywide geographic information systems, population estimates, and forecasts), Countywide strategic planning (annual priority setting process, “Washoe Works–Even Better” continuous improvement program, and issue management system), natural resources planning (water, wastewater, and flood management), and growth management, including the Comprehensive Plan, Development Code, and Capital Improvements Program. Personally represented Washoe County in regional planning activities, including plan updates, preparing regional open space planning and funding legislation (NRS 376A), preparation of the first Regional Open Space Program and Plan and formation of the Nevada Land Conservancy. Appointed by Governor to represent Washoe County on State Land Use Planning Advisory Council.

1983–1990 *Assistant Director of Comprehensive Planning*

1981–1983 *Assistant Director of Regional Planning Commission of Reno, Sparks and Washoe County*

- ◆ Responsible for countywide and unincorporated planning functions including information systems (Countywide geographic information systems, population

estimates and forecasts), natural resources planning (air quality, water, wastewater, and flood management), and growth management (County Comprehensive Plan and Capital Improvements Program). Personally involved in preparation of Comprehensive Regional Plan (predecessor to current Truckee Meadows Regional Plan) and legislation (NRS 278.026-029) that created the Truckee Meadows Regional Planning Agency.

1979–1980 Ohio-Kentucky-Indiana Regional Council of Governments, Cincinnati, Ohio

Regional Planner

- ◆ Responsible for population estimates, population and economic forecasts, and fiscal impact analyses and served as lead planner for a HUD-funded regional plan (including land use, economic development, energy, infrastructure, and fiscal elements) for regional council of governments that is the designated metropolitan planning (transportation), air quality planning, and water quality planning organization for an eight-County tri-state area with a population of approximately 1.6 million.

1977–1979 North Central Texas Council of Governments, Dallas / Fort Worth, Texas

Planning Associate

- ◆ In the Research and Planning Coordination Department, prepared population, employment, and land use forecasts for agency-wide use in council of governments that is the designated metropolitan planning (transportation), air quality planning, and water quality planning organization for a 16-County area, with a population of approximately 3.8 million.

1981–Present

Consultant

Ohio-Kentucky-Indiana Regional Council of Governments

- ◆ Updated and calibrated regional econometric forecasting model for the Cincinnati, Ohio, region.

Dunkin Sefko Urban Planners

- ◆ Prepared and presented fiscal impact analysis models for municipalities, including Garland and Sugarland, Texas, as part of planning studies on development and annexation of large unincorporated areas.

Environmental Systems Research Institute

- ◆ Prepared recommendations for Thailand Department of Town and Country Planning on decentralization of planning from the national level to regions (Changwats), use of geographic information systems, and on organization-wide procedures.

Facilitator

- ◆ Facilitated strategic planning, continuous improvement, and related workshops on both a paid and pro bono basis for the Children’s Cabinet, the Reno-Sparks Chamber of Commerce, the National Committee on Libraries and Information Systems, and various Washoe County and City of Reno departments.

Education and Certification

- ◆ Bachelor of Science in Architecture – University of Texas at Arlington
- ◆ Master of City and Regional Planning – University of Texas at Arlington
- ◆ American Institute of Certified Planners #4799

Select Professional Awards and Honors

- ◆ Environmental Systems Research Institute – 1989 President’s Award
- ◆ American Planning Association 1990 National Planning Award for the Washoe County Capital Improvements Program Pilot Study
- ◆ Nevada Chapter, American Planning Association – 1995 Planner of the Year
- ◆ Sierra Nevada Chapter, American Society of Public Administration – 1995 Public Administrator of the Year
- ◆ National Association of Counties Achievement Award – Multiple Awards
- ◆ Nevada Chapter, American Planning Association Outstanding Project – Multiple Awards

Ms. Jackson has over 32 years of local government management experience. She served as City Manager for the City of San Bruno in the San Francisco Bay Area for fifteen years and the City of Fort Bragg in the coastal Mendocino County for four years. She also served for more than a decade in the Office of the City Manager in the City of Hercules, which was at the time one of the fastest growing communities in the state, and served as Assistant City Manager, Parks and Recreation Director, and as manager for the City's Budget, Redevelopment, and Economic Development functions. Ms. Jackson has extensive experience developing and implementing successful fiscal, organizational, and operational strategies to resolve serious financial deficit situations, including the sharing of core municipal services with other local agencies, restructuring of service delivery systems, and development of public engagement strategies and programs.

Throughout her career, Ms. Jackson established agreements and worked with public and private sector partners to assure community interests in the completion of major development and redevelopment projects including acquisition of prime ocean bluffs property for public open space, planning for redevelopment of a 400-acre oceanfront property following closure of a lumber mill, development of a new train station, redevelopment of a regional mall and a former navy base, and establishment of a multi-agency regional groundwater storage and recovery program.

As Director of Emergency Services for the City of San Bruno, Ms. Jackson led the City's acclaimed response to the devastating 2010 PG&E high pressure gas pipeline explosion and resulting fire that killed eight residents and destroyed 38 homes. That response included negotiation of a \$70 million community restitution fund and establishment of the San Bruno Community Foundation to administer the funds for the long-term benefit of the community. Over the course of several years following the explosion, Ms. Jackson and her team developed and successfully pursued advocacy for pipeline safety and utility regulation improvements that ultimately resulted in major legislative, regulatory, and operational reform at the state and national levels.

Ms. Jackson is a member of the International City/County Managers Association (ICMA). She was recognized by the League of California Cities City Manager's Department as the 2012 City Manager of Distinction. She has presented before a wide variety of audiences on the City of San Bruno experience and pipeline safety. Ms. Jackson holds a Bachelor of Arts degree from the University of California at Berkeley in Social and Cultural Anthropology and completed coursework for a Master of Business Administration degree also at UC Berkeley.

Related Experience Includes:

- ◆ Currently serving as Local Government Specialist for a staffing analysis and optimization plan for the City of West Hollywood, California.
- ◆ Served as Local Government Specialist for an organizational review of the Planning Department for the Midpeninsula Regional Open Space District in the Bay Area.

Career Experience Includes:

City Manager, City of San Bruno, California

2003–2018

- ◆ Managed municipal operations and support development and implementation of City Council policy for this full-service urban community adjacent to San Francisco International Airport with a residential population of 43,000; oversaw 250 full-time employees, a \$43 million General Fund annual operating budget, and over \$150 million all funds budget, including City operations that entailed water production/distribution and wastewater enterprises and a full-service incumbent cable television / internet technology enterprise.
- ◆ Managed City response to catastrophic September 2010 Pacific Gas & Electric Co. high-pressure gas transmission line explosion that devastated a neighborhood, destroying 38 homes, seriously damaging 17, and killing eight persons.
 - Represented the City and led its participation in the comprehensive year-long National Transportation Safety Board investigation and three subsequent investigative proceedings before the California Public Utilities Commission, of which the City's initiative and advocacy were instrumental in bringing about extensive reform of the State utility regulatory system and safety improvements at PG&E.
 - Negotiated a \$50 million trust fund to cover City costs for community rebuilding and recovery; developed strategy and managed team that negotiated a separate \$70 million community restitution fund.
 - Provided oversight and leadership to the City's comprehensive program of support services to assist affected residents and the City's capital program to replace all public infrastructure in the 375-unit neighborhood.
 - Represented the City and presented at numerous government and industry conferences, legislative hearings, and other events on pipeline safety, utility/regulatory reform, and disaster response.
- ◆ Led development and implementation of fiscal and operational strategies that resulted in the City weathering the multi-year recession that began in 2008, with limited service reductions, balanced annual budgets, and establishment of new reserve funds totaling over \$15 million.
- ◆ Provided leadership in County-wide review of shared service options and instituted one of the County's first shared service arrangements by fully integrating Fire Department command staff with an adjacent city.
- ◆ Established the San Bruno Community Foundation to administer the \$70 million community restitution funds from PG&E and completed comprehensive community visioning and planning process for development of a new recreation center and swimming pool.
- ◆ Ensured successful redevelopment of 20-acre former U.S. Navy site to 1090 new transit-oriented apartments and a commercial center with the City's first full-service fine dining restaurant; ensured redevelopment/transformation of the

former aged Tanforan Mall to The Shops at Tanforan, a modern regional shopping destination.

- ◆ Coordinated the City's role with Caltrain in planning, design development and delivery of the San Bruno Caltrain grade separation and new station in San Bruno's downtown.
- ◆ Coordinated with the San Francisco Public Utilities Commission and two other local water producers to negotiate and implement a Regional Groundwater Storage and Recovery Agreement to ensure cooperative management of the regional groundwater supply and drought response.
- ◆ Completed comprehensive General Plan update.
- ◆ Completed development of master plans for the City's water, wastewater and stormwater utilities; established utility rate programs; developed a comprehensive 20-year capital improvements work program to replace and rehabilitate the City's entire aging utility infrastructure; and successfully completed over \$20 million of necessary improvements in the first several years of the program.
- ◆ Ensured successful municipal operation of the San Bruno Cable Television enterprise (established in 1972) in an era of rapid technology change and intense competitive pressure, adding high-speed internet and other technology services to ensure the enterprise maintained a majority market share.
- ◆ Coordinated with YouTube to initiate preparation of a Specific Plan to guide redevelopment of the 90-acre Bayhill Office Park to expand YouTube's headquarters campus.

City Manager, City of Fort Bragg, California

2000–2003

- ◆ Supported City Council and managed municipal operations for oceanfront tourist destination community of 7,500 residents and 25,000 service population in a full-service city with an all-funds budget of \$9 million, including water production, wastewater treatment, public safety, community development, and administrative services.
 - Initiated master planning for 400-acre oceanfront property following closure of former lumber mill.
 - Completed strategic planning and initiated implementation of downtown revitalization program.
 - Established fiscal stability with elimination of over \$600,000 General Fund deficit; established reserves and paid off \$1 million inter-fund debt.
 - Developed and initiated the City's first long-term capital improvements program; initiated comprehensive \$3.8 million grant-funded street improvement program and water system upgrade.
 - Coordinated community volunteer playground renovation project.
 - Negotiated acquisition of prime ocean bluffs property for public open space in coordination with the California State Coastal Conservancy.

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- Facilitated long-range strategic planning for transition of community economy from traditional industries with completion of eight-year process for comprehensive General Plan, Local Coastal Plan, and Housing Element Update.

City of Hercules, California

1986–1999

- ◆ Served in various roles in tenure at the City, which includes:
 - Assistant City Manager, August 1997–December 1999
 - Interim City Manager, December 1996–August 1997
 - Deputy City Manager, July 1991–November 1996
 - Assistant to the City Manager, July 1988–June 1991
 - Administrative Analyst, July 1986–June 1988
- ◆ Managed Citywide annual budget development process.
- ◆ Negotiated development agreements for a \$20 million expansion of the community’s largest business and a \$220 million refinery site remediation project and redevelopment to a new residential neighborhood.
- ◆ Managed year-long process to establish new 280-acre redevelopment project area.
- ◆ Coordinated planning for redevelopment of downtown shopping center, the community’s first hotel, train station, and transit-oriented business district.
- ◆ Managed wastewater capacity expansion project, including facilitating regional coordination with two adjacent communities and evaluation of public/private partnership for a design/build/operate solution.
- ◆ Marketed business park properties and negotiated purchase agreement to resolve pending redevelopment agency assessment foreclosure.
- ◆ Maintained proactive regional involvement to plan and initiate construction of Highway 4 west parkway improvements, design of Hercules High School, and completion of a joint use City and school district park project.
- ◆ Negotiated cable television franchise agreement and transfer agreements.
- ◆ Developed and implemented strategy for full cost recovery of recreation programs.
- ◆ Provided operations and project support to the City Manager in all areas of City operations, including economic development, emergency preparedness, and solid waste management.

Education and Certification:

- ◆ Bachelor of Arts in Social and Cultural Anthropology from University of California, Berkeley
- ◆ Master of Business Administration from the Haas School of Business at the University of California, Berkeley

Dr. Nicholas Pinhey has over 33 years' experience in the management of municipal utility and public works departments, and he has served as a Director of Public Works or Assistant Public Works Director for the majority of his career. He recently served as Interim General Manager for the Stanislaus Regional Water Authority. Dr. Pinhey has managed full-service public works departments in cities serving populations ranging in size from 45,000 to 215,000. Dr. Pinhey has experience in water and wastewater utility operation and management, has direct experience in all aspects of public works maintenance activities, and has directed engineering functions and major capital projects. He is certified by the State of California as a wastewater treatment plant operator Grade IV, surface water treatment plant operator Grade 3, and a water distribution system operator Grade 3. He is also certified as a wastewater collection systems maintenance technician Grade 3 and an environmental compliance inspector Grade 1 by the California Water Environment Association. Dr. Pinhey is also a frequent speaker at water/wastewater conferences and professional training events. He has extensive experience in the training of professional and technical competencies in public utilities. He is also an adjunct teacher in the Graduate Public Administration Program at California State University, Stanislaus.

Related Experience Includes:

- ◆ Served as Public Works Technical Resource on the assessment of the Public Work Department for the City of Albany, California.
- ◆ Served as Technical Advisor to provide wastewater, collection, and plan operations for the City of Pacifica, California.
- ◆ Served as Public Works Specialist and Technical Resource to develop a report identifying all City-owned real property for the City of Tracy, California.
- ◆ Performed a water supply alternatives study for Shoreline Environmental Engineering on behalf of the City of Waterford, California.
- ◆ Served as Senior Associate for Citygate Associates' assessment of the workload, processes, and staffing needs for the Public Works Department in the Town of Windsor, California.
- ◆ Designed and implemented three extensive reorganizations of municipal public works departments to improve efficiency and effectiveness in the delivery of services and to ensure alignment with City goals and strategic initiatives.
- ◆ As the Director of Utility Planning and Projects for the City of Modesto, California, was responsible for regional water, wastewater, recycled water, and stormwater utility planning; capital improvement project development, funding, and implementation; water resources development; water resources strategic development; and multi-agency coordination.
 - Led efforts to regionalize recycled water treatment and delivery, regionalization of surface water treatment and delivery, and the regionalization of wastewater treatment for multiple public agencies.
- ◆ As the Director of Public Works for the City of Modesto, California, provided leadership to a full-service department that includes water, wastewater, airport, transit, fleet, street maintenance, capital projects, and engineering

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- Led a department of 365 employees with a \$100 million operating budget and a \$500 million capital budget.
 - Initiated and implemented two reorganizations of the Modesto Public Works Department to create a mission-driven focus and develop a one-stop shop for development projects.
 - Served as the lead staff person responsible for the development of a wastewater treatment capacity banking program to support economic development; also led the efforts to regionalize water and wastewater services for the City.
 - ◆ As Director of Public Works for the City of Tracy, California, during his 10-year tenure, directed a full-service public works department for a rapidly growing city.
 - Was responsible for supporting the planning, financing, and provision of infrastructure and water supplies as the City grew from a population of 45,000 to 80,000.
 - Was also responsible for master planning, specifically for utilities and public facilities, and participated in the development of surface water treatment and tertiary wastewater treatment facilities for the City.
 - Also initiated and implemented a reorganization of public works and community development to streamline the development process and provide a better focus for public works operations and utilities.
 - ◆ As Director of Public Works and Assistant Director of Public Works for the City of Merced, California, provided over ten years of leadership for a full-service public works department for a city with a population of 55,000.
 - In addition to the utilities, traffic, and streets/roads services, also directed a full-service municipal solid waste operation service providing residential, commercial, and industrial service.
 - Served as the Chair of the Merced County Integrated Waste Management Task Force for four years.
 - Participated in a major reorganization of the Public Works Department, during which he implemented the principles of Total Quality Management, as well as self-directed work teams and expenditure control budgeting.
 - ◆ Served as General Manager of a community services district (wastewater) while Director of Public Works for the City of Merced, California.
 - Responsibilities included managing the operations, budgets, and rate setting process for the district.
 - ◆ Served as the Director of Public Works in charge of a full-service public works department for Patterson, California, a City with a population of 5,000.
 - Developed departmental strategic plans, organizational strategic plans, and participated in community visioning processes.

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- ◆ Teaches public agency budgeting and strategic planning at the graduate level for the MPA program at California State University, Stanislaus.
 - ◆ Served as a researcher for the Natural Heritage Institute, performing institutional analyses of conjunctive use water supply programs in California.
 - ◆ Certified by the State of California as a wastewater treatment plant operator Grade IV, surface water treatment plant operator Grade 3, and a water distribution system operator Grade 3.
 - ◆ Certified as a wastewater collection systems maintenance technician Grade 3 and an environmental compliance inspector Grade 1 by the California Water Environment Association.

Professional Accomplishments:

- ◆ Currently serving on the Central Valley Salinity Coalition leadership group.
- ◆ Currently Chair of the State committee for the implementation of Statewide waste discharge requirements.
- ◆ Served a 10-year tenure as a board member and president for the California Water Environment Association.
- ◆ Served as a board member for the Water Environment Federation, an international utility organization.
- ◆ Served on the League of California Cities Environmental Quality Committee.
- ◆ Published researcher with the Natural Heritage Institute and the Groundwater Resources Association of California regarding California water supply issues.

Mr. Green has over 35 years of experience in all aspects of municipal finance, including as a professional manager. He has had primary responsibility for the development and monitoring of citywide budgets for four municipalities, with total budgets ranging from \$70 million to \$680 million. He developed and fine-tuned long-range financial plans for multiple municipalities, including playing a lead role in taking the City of Pasadena from a \$10 million General Fund operating deficit to a \$5 million General Fund operating surplus. Mr. Green has extensive experience with all aspects of the operations of a municipal finance department including, but not limited to, financial reporting/accounting and analysis, accounts payable/receivable, debt issuance/management, payroll, investments, business licensing, risk management, purchasing, grant management, labor relations, and budgeting. Additionally, Mr. Green has developed and implemented finance department strategic plans in several jurisdictions. He has also served on many government finance organizations including California Society of Municipal Finance Officers Chapter Co-chair, League of California Cities Employee Relations Department representative, and the State of Nevada Committee on Local Government Finance committee member.

Related Experience Includes:

- ◆ Serving as Fiscal Specialist and Lead Consultant to conduct a fees/charges and cost recovery review for Community Development Department activities for Clark County, Washington.
- ◆ Served as Local Government Finance Specialist for an organizational review and budget stabilization assessment for the City of Angels Camp, California, with the purpose of developing a strategic, goal-focused, sustainable budget strategy.
- ◆ Served as Financial Analyst for an organizational review of the Finance Department for the City of South Pasadena, California, including reviewing the Department's operational functions and workflow processes.
- ◆ Serving as Fiscal Specialist to assist the Groveland Community Service District in updating its Fire Master Plan and evaluating impacts of planned new developments outside the current District boundaries.
- ◆ Currently serving as Fiscal Specialist to conduct an analytical fire department service utilization and staffing patterns review for the Marin County Fire Department.
- ◆ Currently serving as Local Government Fiscal Specialist for a deployment study and assessment of the City of Redlands Fire Department.
- ◆ Served as Project Manager to provide technical consulting support for the County's efforts to prepare a request for proposals for the upcoming contract period for a vendor(s) to provide animal services for San Mateo County, California, and its member cities.
- ◆ Currently serving as Local Government Finance Specialist to evaluate the performance of the Peninsula Humane Society and Society for the Prevention of Cruelty to Animals in San Mateo County, California, to examine contractual compliance, as well as whether the necessary animal shelter operational elements exist to increase performance and transparency.

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- ◆ Currently serving as Senior Fire Services Specialist for an operational enhancements study for the County of Santa Barbara Fire Department, an update to the fire service deployment and departmental performance audit study Citygate previously performed for the Department.
 - ◆ Currently serving as Fiscal Specialist for a staffing analysis and optimization plan for the City of West Hollywood, California.
 - ◆ Currently serving as Fiscal Specialist for a deployment analysis, with fiscal/governance options analysis, for the County of Solano Local Agency Formation Commission, which includes the Cordelia Fire Protection District, the Vacaville Fire Protection District, the Suisun Fire Protection District, and the Montezuma Fire Protection District.
 - ◆ Served as Project Manager and Local Government Finance Specialist to provide an operational review of the Animal Care Services Division for the City of Sacramento, California, including a workload and staffing analysis.
 - ◆ Serving as Fiscal Specialist to assist the City of San Luis Obispo, California, and its partners to study the opportunities and constraints in merging some of the County's police and fire dispatch centers into one shared center located at the San Luis Obispo Police Department dispatch center.
 - ◆ Served as Fiscal Specialist for a Standards of Coverage and headquarters services assessment for the Fire Department in the City of Milpitas, California.
 - ◆ Served as Financial Analyst for a high-level field operations and sheltering practices cost analysis for the Contra Costa County Animal Services Department.
 - ◆ Served as Fiscal Specialist for a performance and fiscal audit of the Department of Fire and Public Safety in Maui, Hawaii, specifically designed to analyze the County's current budgeted resource capacity and the utilization and allocation of those resources.
 - ◆ While serving as Pasadena's Finance Director, served Paul Arevalo and other board members of the Rose Bowl Operating Company during the Pasadena Rose Bowl renovation project by presenting financing and fiscal analysis.
 - ◆ Completed the Comprehensive Annual Financial Report on time and with clean audit opinions for four municipalities during more than 30 years of being primarily responsible for developing and monitoring the citywide budgets, with total budgets ranging from \$70 million to \$680 million.
 - ◆ Developed and fine-tuned long-range financial plans for multiple municipalities, including playing a lead role in taking the City of Pasadena from a \$10 million General Fund operating deficit to a \$5 million General Fund operating surplus.
 - ◆ Served as financing team lead for numerous multi-million debt issuances, including the \$282 million ReTRAC, a \$108 million event center, and \$35 million in Cabela's projects in Reno, Nevada; and the \$156 million Rose Bowl renovation in Pasadena, California.
 - ◆ Appointed to the Employee Relations Committee by the League of California Cities' Fiscal Officers Department and voted in as the second Vice President of

the League's Executive Committee. (Change of employment prevented serving in this role).

- ◆ Served as Chief Negotiator for the Cities of Rialto, California, and Reno, Nevada for various police and fire labor units, achieving successful multi-year agreements in both Cities.
- ◆ Developed a strategic action plan to improve the motor pool operation of the City of Rialto.
- ◆ Developed a review, monitoring, and evaluation process for the worker's compensation program for the City of Rialto, which resulted in a 15 percent savings in costs.
- ◆ Served in the lead role in four different, successful financial system conversions.
- ◆ Appointed by the League of Nevada Cities to be a member of the Committee on Local Government Finance, which monitors and makes recommendations on Statewide operations of local governments.
- ◆ Served as a board member and executive committee member of risk-sharing pool for the City of Rialto's liability function.
- ◆ Developed and implemented a cross-functional work-team concept in the finance departments of the Cities of Rialto and Reno, which improved operational efficiency and effectiveness, as well as department morale.
- ◆ Successfully motivated and directed staff to implement the various internal audit recommendations given to the finance departments for the Cities of Reno and Pasadena.
- ◆ Significantly increased the level of professionalism and education among the senior management staff of the finance departments of the Cities of Reno and Pasadena.
- ◆ Developed the first vision statements for the finance departments for the Cities of Reno and Pasadena to maintain departmental focus on achieving the citywide vision.
- ◆ Developed and implemented annual senior management staff retreats to ensure that department senior managers remain focused on the department and the Citywide vision.

Employment

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| <i>Director of Finance, City of Pasadena, CA</i> | 2009–2015 |
| <i>Finance Director, City of Reno, NV</i> | 2001–2009 |
| <i>Director of Finance / Director of Administrative Services, City of Rialto, CA</i> | 1992–2001 |
| <i>Director of Finance, City of San Bernardino, CA</i> | 1986–1992 |
| <i>Assistant Director of Finance, City of San Bernardino, CA</i> | 1985–1986 |
| <i>Internal Auditor / Budget Officer, City of San Bernardino, CA</i> | 1984–1985 |

Honors and Awards

- ◆ Pasadena NAACP Government Sector Honoree
- ◆ San Bernardino Management Association Manager of the Year
- ◆ San Bernardino NAACP Pioneer Award
- ◆ Government Finance Officer Association Certificate of Achievement in Outstanding Financial Reporting: eight years in Reno, nine years in Rialto, and six years in Pasadena
- ◆ Government Finance Officer Association Distinguished Budgeting Award: eight years in Reno and six years in Pasadena
- ◆ Fontana Branch Derby Club Outstanding Achievement Award

Mr. Mazza retired as the Fire Chief for the City of Monterey, California, where he engineered and facilitated the consolidation of the Monterey and Pacific Grove fire departments in 2008. His fire service career spans 38 years with city, county, special district, and state fire agencies and includes administration, operations, air operations, training, dispatch, disaster planning and management, fire prevention, and law enforcement experience. He served as the Incident Commander on a statewide Incident Command Team and continues to serve as a member of the Monterey City and Monterey County Emergency Operations Center staffs. Mr. Mazza holds a bachelor's degree from California State University, Fresno, and an associate degree in fire science from Fresno City College, and he is a graduate of the Executive Fire Officer Program.

Mr. Mazza has extensive collaborative experience, having served elected and appointed positions in numerous professional organizations and on regional committees and initiatives. He has served as the Fire and Rescue Coordinator and chaired the California Incident Command Certification System Peer Review Committee for the California Emergency Management Agency Monterey County Operational Area, and he also served on the Monterey County Operational Area Grant Approval Authority for the California Department of Homeland Security. He has served as President of the Monterey County Fire Chiefs Association and represented county fire agencies on committees providing governance and policy oversight of the Monterey County voice and data emergency communications and dispatch systems. He obtained grant funding and facilitated implementation of a mobile data communications system for Monterey County fire agencies in 2010 and initiated and led the continuing effort to develop a regional shared governance fire agency for the Monterey Peninsula.

Memberships Held Include:

- ◆ International Association of Fire Chiefs, Fairfax, VA
- ◆ California Fire Chiefs Association, Rio Linda, CA

Consulting Experience Includes:

The following is a selection of Mr. Mazza's consulting experience since joining Citygate:

- ◆ Served as Senior Fire Services Specialist and Project Manager for a Winter Storm Response Plan update for Monterey County and Response Plan development for Santa Cruz County.
- ◆ Served as the Senior Fire Services Specialist and Project Manager for a tabletop exercise for the Monterey County Office of Emergency Services.
- ◆ Served as Senior Fire Services Specialist for a comprehensive fiscal feasibility analysis and to facilitate the development of a governance and Joint Powers Authority (JPA) agreement for the formation of a 9-1-1 emergency communications JPA for the Monterey County public safety agencies.
- ◆ Served as Senior Fire and Emergency Services Specialist to conduct a Standards of Coverage update for the City of San Diego Fire-Rescue Department.
- ◆ Served as Senior Fire Services Specialist and Project Manager to conduct a Standards of Coverage assessment and Master Plan update for the Chino Valley Independent Fire District.

- ◆ Served as Senior Fire Services Specialist and Project Manager for a Standards of Coverage Study and Master Plan for the City of South San Francisco, California.
- ◆ Served as Senior Fire Services and Risk Assessment Specialist for a comprehensive community risk assessment, Standards of Coverage study, and station location and deployment study for the City of Sunnyvale, California.
- ◆ Served as Senior Fire Services Specialist for a fire and emergency medical service needs assessment in the Sweetwater area of the San Antonio Valley for the Santa Clara County, California.
- ◆ Served as Senior Fire and Emergency Services Specialist for a Fire Department organizational review for the City of San Jose Fire Department.
- ◆ Served as Senior Fire Services Specialist for a Standards of Coverage and headquarters services assessment for the Fire Department in the City of Milpitas, California.
- ◆ Currently serving as Senior Fire Services Specialist for a Standards of Coverage assessment for the City of Fremont, California.
- ◆ Served as Senior Fire and Emergency Services Specialist for a fire services Standards of Coverage analysis for the Alameda County Fire Department.
- ◆ Currently serving as Senior Fire Services Specialist and Project Manager to conduct a Standards of Coverage assessment for the City of Morgan Hill, California, and the partner Departments in South Santa Clara County.
- ◆ Served as Fire Service Specialist to conduct a fire services alternatives study for the Cities of Newark and Union City, California.
- ◆ Currently serving as Senior Fire Services Specialist for a service level assessment of the Orange County Fire Authority's Fleet Services Division to ascertain the efficiency and effectiveness of Fleet Services' operations and ensure compliance with policies/procedures, best practices, and regulatory agencies. This was one of five as-needed organizational service level assessments of operations for Orange County Fire Authority as part of a Master Services Agreement.
- ◆ Currently serving as Senior Fire Services Specialist for a service level assessment of the Orange County Fire Authority's Field Deployment services utilizing the Standards of Coverage methodology. This was one of five as-needed organizational service level assessments of operations for Orange County Fire Authority as part of a Master Services Agreement.

Significant Programs/Projects:

- ◆ Coordinated rewrite of the Monterey City Emergency Operations Plan in 2010 in conformance with federal and state all-hazard guidelines.
- ◆ Authored Damage Assessment Plan annex to the Monterey City Emergency Operations Plan.
- ◆ Authored Critical Infrastructure and Key Resources Plan annex to the Monterey City Emergency Operations Plan.

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- ◆ Authored Pandemic Influenza Preparedness and Response Plan annex to the Monterey City Emergency Operations Plan.
 - ◆ Developed and administered multiple fire service contracts.
 - ◆ Coordinated annual Proposition 172 allocation for Monterey County fire agencies with the Monterey County Administrative Office.
 - ◆ Served on the Board of Directors – Fire Agency Insurance Risk Authority.
 - ◆ Served on the Monterey County Emergency Medical Services Agency Task Force, evaluating and recommending enhancements to the Monterey County EMS system.
 - ◆ Represented Monterey County fire agencies on the Monterey County Emergency Medical System Committee.
 - ◆ Coordinated fire agencies' recommendations and comments to the Monterey County General Plan update.
 - ◆ Coordinated implementation of the California Incident Command Certification System within the Monterey County Operational Area.
 - ◆ Participated in the National Fallen Firefighters Foundation Wildland Fire Symposium to develop initiatives to reduce firefighter line-of-duty-fatalities.
 - ◆ Developed and implemented capital facilities and equipment replacement and maintenance plans.
 - ◆ Facilitated development and implementation of multiple Strategic Plans.
 - ◆ Facilitated implementation of the reorganization of Monterey County Service Area #61 into the South Monterey County Fire Protection District.
 - ◆ Coordinated development and implementation of a Fire District Illness and Injury Prevention Plan.
 - ◆ Coordinated development and implementation of fire suppression assessment and mitigation fee ordinances.
 - ◆ Co-facilitated development and implementation of multi-agency engine and truck company performance standards.